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Corporate Curriculum: Instructional Designer Practices for Professional Adult Learning

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Walden University

College of Education and Human Sciences

This is to certify that the doctoral study by

Zoa-Gay Bonofiglio

has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

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Walden University
2024

Abstract

Corporate Curriculum: Instructional Designer Practices for Professional Adult Learning

by

Zoa-Gay Bonofiglio

MS, Walden University, 2015

MA, Michigan State University, 2008

BS, Michigan State University, 2004

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Education

Walden University

February 2024

Abstract

Using self-efficacy (SE), andragogical, and pedagogical frameworks, the goal for this study was to explore instructional designer (IDer) narratives in response to questions focused on their perceptions of instructional design (ID) practices for creation of workplace education and training assets, specifically intentionality in the use of transfer of learning (ToL) methods. A total of 15 volunteer IDers engaged in conversation about their perceptions, experiences, and practices for designing professional development. ToL is defined as successful application of newly acquired knowledge and skills that inform new behavior and ideation as a direct outcome from specific learning assets and curriculum content. Inquiry for this study was framed to better understand how IDers perceptions of adult learning competency skills building as well as how IDers describe their practices in relation to adult learners' acquisition of professional development and ToL in response to workplace training. After conducting 12 one-on-one interviews and one focus-group of three volunteers, coding and thematic analysis was conducted resulting in the following two themes: (a) Divergences in expectations of IDer competencies who are tasked with creating workplace education and training for adult learners; and (b) misalignment in organization goals for workforce and IDer pedagogical acumen preparedness for the intentional design of workplace curriculum to promote ToL. Results from this study provide a glimpse into the misalignment of the professionalization of the ID industry and the intentional need for established competencies to promote high levels of SE, competencies, and professional identities for IDers.

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Dedication

This work is dedicated to my daughter and best friend, Chelsea-Ann Bonofiglio. Her consistent belief in me gives me breath. Her ability to know when to push or when to sit beside me is truly the life energy of my existence. Our hours of talking, laughing, screaming as we worked through our individual assignments and hours toiling over words and projects… kept me grounded. Through her eyes, I found faith in my ability to climb over hurdles to make this dissertation dream a defended reality. I love you sweet baby girl. And, to my mother, Carol Ferris, who taught me resilience and advocacy. My mother's grace and honesty showed me to see things through the eyes of others. Her love and support have always been, and will continue to be, unconditional. I am a better person because of the lessons she taught to and modeled for me. Finally, to my furry kitties, Jeff/Zoey/Shadow. Through purrs and persistency, they made me slow down and appreciate all the purrs life has to offer. I miss them eternally. There is more to life than endless reading and writing. I am blessed to be surrounded by a circle of amazing friends and family (chosen and birthright), all of whom supported me emotionally, intellectually, and made sure I laughed, slept, stayed connected, and drank water when I overindulged the caffeine! I love you all…Alonz-y!

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The completion of this document could not have come to fruition without Dr. Crissie Jameson's expertise, compassion, cheerleading, and genuine faith in me. The doctoral journey is paved with moments of joy and absolute despair. Dr. Jameson was an answer to a moment of despair. The immediate interest and active participation, Dr. Jameson provided allowed me to see my work through new eyes. I was provided the opportunity to discuss findings with a mentor who read the mountain of data and pages of ideas. Dr. Jameson reminded that I was a writer and that I had (and have) the skills to do this thing called a dissertation. We did it, Dr. Jameson, just like you always knew we would.

Included in this acknowledgement is a thank you to Dr. Sunddip Aguilar. During the proposal phase, Dr. Aguilar advocated for my research topic, a topic outside the norm for this program. It was Dr. Aguilar's voice I heard telling me to "just write." So, I did and here we are. Dr. Aguilar, your faith in my study quietly and diligently guided this journey.

Finally, to The Richard W. Riley College of Education and Human Sciences leadership and advisory team. I give thanks for your patience and support in my pursuit of this doctorate degree, especially to my advisor, Lindsay Gilbertson.

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Chapter 1: Introduction to the Study

The purpose for this exploratory case study was to gather first account experiences and conversations with instructional designers (IDers) as well as their perceptions of how they create workplace education and training assets in support of adult learners' competencies and transfer of learning (ToL) in the workplace. Self-efficacy (SE), andrological, and pedagogical lenses were used to explore IDers' perceptions about their practices and insights as designers of learning initiatives for adult learners' consumption of workplace education and training assets.

Thorndike (2013), who has been attributed as the originator for the ToL theory, established three laws: the law of readiness, the law of exercise and the law of effect. Essentially, the act of learning is bound by specific needs in support of instinctual survival skills and responds in a cause and effect way with learning being the catalyst of a desired goal. Learning is timely, active, and purposeful/intentional (covertly and overtly).

Similarly, Knowles (1980, 1990), attributed as the originator of adult learning theories (andragogy), posited four assumptions necessary for adult learners: adults need to be informed as to the need of the learning; learning context needs to be experiential; adult learning assets need to be problem-solution bound; and the learning must provide immediate importance to the learner. Both Thorndike and Knowles concluded that ToL took place when new knowledge connected with already formed understandings and was applied to new behavior. Furthermore, Bates et al. (2012) suggested ToL can be measurable when new skills are applied in a sustained way after a training event. In relation to these understandings, I define ToL as sustained application of newly acquired

knowledge and skills that inform behavioral change and ideation as a direct outcome from learning experiences.

Information culled from interviews and review of online document resources were analyzed to amplify conversations, research, and insight informing IDer SE and practices in workplace education and training. Focusing this study on the perceptions of the actual IDer provided new considerations about ways to align instructional design (ID) competencies as well as the perceived professionalization of the ID industry, including required IDer competencies for optimal ideation and creation of workplace education and training material. In addition, it was hoped that conversations in response to this study will promote IDer professional identities as critical creators of workplace education and training initiatives and programs.

There was consensus among all participants regarding the criticalness for workplace education and training that effectively promoted ToL for workplace sustainability, growth, and human resource (HR) satisfaction. A skilled workforce is paramount to corporate success and economic growth (Greenan, 2022; Yunus et al., 2022). Therefore, it was reasonable to argue the importance of workplace education and training and gain an understanding of IDer abilities and competencies in their creation of workplace education and training assets was an important consideration for research, especially considering the lack of studies from IDer perspectives.

Understanding processes and challenges faced by IDers will help to better understand realistic insider competencies necessary for the professional IDer role versus unrealistic outsider assumptions. Therefore, research focused on the outcomes of

workplace education and training will benefit from the exploration of competencies and perspectives of those tasked with creating training programs for employee professional development assets and programs (Honebein, 2022; Kraiger & Ford, 2021; Renta-Davids et al., 2014). ID processes and best practices, grounded in empirical research, are critical components in ensuring workplace education and training initiatives promote outcomes aligned for ToL (Renta-Davids et al., 2014). Focusing on IDers from a qualitative perspective, participants in this study were asked to reflect on their practices thus expanding workplace education and training conversations grounded in quantitative studies, which typically focuses on likeability level assessments from survey data examining learner outcomes and participation satisfaction (Nafukho et al., 2022; Nafukho et al., 2017).

In Chapter 1, the background of the study was explained as well as the problem statement, purpose, research questions, conceptual framework, and nature of the study as well as information to support specific definitions, assumptions, scope of delimitations, limitations, and study significance. Chapter 2 provides a review of literature including strategies used to ground this study as related to key variables and concepts. Research methods along with a discussion on design and rationale are the focus for Chapter 3, along with an explanation of my role as researcher along with methodological information. Results of this study are provided in Chapter 4, including information about setting, data collection, and data analysis. Chapter 5 contains a full discussion on findings, limitations, and recommendations as well as suggestions for future studies.

Background

In the United States, corporate education and training budgets for employee skill building and professional development is costly. Workplace professional journals and survey data reported training budgets reaching well into the billion-dollar range (Lancaster et al., 2013; LinkedIn 2023 Workplace Learning Report; Moore et al., 2022; Salas et al., 2012; Statista Research Department, 2023). Professional learning and development (L&D) programs are expected to provide positive returns on investment (ROI) as well as promote ToL in support of competent professionals skilled in necessary cognitive and performative outcomes.

Based on a review of multiple sources including workplace education and training literature, ToL and ID literature as well as professional adult education literature, researchers have primarily focused on how higher education curriculum prepares the workforce from a learner perspective and not of those creating training and/or how they themselves are trained (Masalimova et al., 2016). Reviewable research available for this case study were typically quantitative measuring levels of learner perceptions and engagement in regards a learning event. Research concerning workplace education and training was typically less represented (Renta-Davids et al., 2014). However, workplace education and training initiatives are expected to provide curricula and learning assets in support of professional development and skills/trade building for adults.

Researchers have expressed a need for more studies focused on the ID and curriculum development from the perspective of the trainer and designer to better understand the needs of adult learners and the ToL problem (Bates et al., 2012; Hutchins,

2009; Nafukho et al., 2017; Renta-Davids et al., 2014). It was not enough to focus only on mechanical aspects of workplace education and training asset development and application tools. An intentional design using pedagogical best practices was also an important consideration in the pursuit of ToL (Renta-Davids et al., 2014).

Andragogy, the study of adult learning, provides principles specifically developed based on foundational research of how adult learners engage learning, for what purposes, and what seems to be effective processes. Andragogical principles support the establishment of highly effective curricula, and it can be argued that IDers tasked with curriculum development for adult learners should be skilled in the application of andragogical principles alongside pedagogical best practices. Adult learning through the lens of corporate curriculum development, instruction, and assessment has a history grounded in performance improvement (Abaci & Pershing, 2016). Throughout an adult's professional career, learning continues to be highly relevant as they maneuver professional goals and necessary skills to perform expect workplace tasks and application of knowledge (MacDermott & Ortiz, 2017; Merriam & Bierema, 2014). The relevancy of adult education in corporate settings suggests curriculum and ID are foundational aspect for effective workplace education and training.

Kolb and Kolb (2009) established an accepted theory regarding the importance of experiential learning and posit that learning should be active, relevant, and viewed as a process. ToL requires instruction beyond bulleted lists of information given to a learner or lectured at a learner. Learning, from a constructivist perspective, promotes learner-centric ID versus content-centric (Botma et al., 2015). This could also be applied as viable for

adult learners (Knowles, 1980; Merriam & Bierema, 2014; Pavlova, & Sanger, 2015; Zepeda et al., 2014). Little has been empirically researched about how corporate curriculum development might best support ToL as well as what an IDer would need to include for the goal of ToL. Additionally, even less research has been conducted from IDer professional and personal experiences and practices.

Pappas (2014) posited research was focused on the integration of technology and eLearning initiatives as well as generational concerns. The typical corporate L&D model continues to be content-centric or teacher-centric (sage on the stage) focused on providing information versus relevant, authentic experiential learning. Little attention has been given to cognitive load and effective curriculum design leaving a gap in knowledge about IDer intentionality around processes for corporate curriculum development and the use of adult learning principles and pedagogical best practices.

Problem Statement

The problem was low ToL outcomes and limited skill-set sustainability despite a growth in ID practices for professional adult learning. During a personal conversation with Wendy Kirkpatrick (personal communication, February 13, 2018), co-creator of the Kirkpatrick model[1], an established four level model for training program evaluation, posited that while real-world evaluation for adult training programs was widely used, most workplace education and training fails to effectively engage learners in sustained learning. Researchers put forward their concerns regarding inconsistencies with ToL in workplace education and learning programs (Honebein, 2022; Kraiger & Ford, 2021;

[1] The Kirkpatrick Model is https://kirkpatrickpartners.com/the-kirkpatrick-model/

Seeg et al., 2022). The ID process used to create education and training assets was important for effective ToL outcomes and supports the argument on the importance of exploring gaps in research on this subject to better understand how IDers perceive ToL and engage andragogical best practices in alignment with their ID practices (Knowles et al., 2015; Zawacki-Richter et al., 2014).

Research about IDer practices and corporate curriculum development was mostly limited to industry vendor generated white papers with even fewer empirical studies exploring ID industry intentionality and defined IDer competencies in relation to ToL. Recent research has focused on ID as a support for university faculty conducting on-line courses (Halupa, 2019; Jung et al., 2022). ID, as a topic of interest and research, has seen an uptick since the COVID-19 pandemic and the instant need for distance learning. Historically, ID was a systems approach utilized by the U.S. military and has only recently been a topic of research outside of that venue.

Industry reports on the state of workplace education and training was focused on outcomes in relation to human capital and ROI with minimal, if any, focus on the processes and competencies of those creating the actual learning (Arnold, 2006; Brassey et al., 2018; Freifeld, 2021; Nafukho et al., 2017; Pappas, 2019; Statista Research Department, 2023; LinkedIn 2023 Workplace Learning Report, 2023). Other researchers have argued that for professional adults to apply learning from training opportunities, there must be intentional ID practices promoting ToL (Baldwin & Ford, 1988; Kirkpatrick & Kayser Kirkpatrick, 2016; Knowles et al., 2015; Nafukho et al., 2017; Renta-Davids et al., 2014). Furthermore, some researchers suggest a need for studies

focused on adult learning to better understand and evaluate problems associated with ToL (Kirkpatrick & Kayser Kirkpatrick, 2016; Nafukho et al., 2017; Zawacki-Richter et al., 2014).

Purpose of the Study

The purpose for this exploratory case study was to gather first account experiences and conversations with IDers as well as their perceptions of how they create educational and training assets in support of adult learners' competencies and ToL in the workplace. Research suggests more thoughtfully planned curricula promote higher ToL as well as being aligned with andragogical best practices (Kirkpatrick & Kayser Kirkpatrick, 2016; Knowles et al., 2015). Incorporating adult learning best practices into professional training curricula has the potential benefit of promoting workplace happiness and increase equitable practices in support of inclusive workplace culture by embracing adult learner diversities. Learner success, engagement, and gratification help promote SE and in turn influence success for adults engaged in their own professional goals, self-regulation, and emotional intelligences (Komarraju & Nadler, 2013).

Participants for this study included 11 IDers; instructional developers; training and education leadership members. Interviews, focus group discussions, and document analysis supported the exploration of research questions. Data from such information could add to current research investigating adult learner motivation, learner participation barriers, and professional identity development (Alsubaie, 2016).

Research Questions (Qualitative)

The following research questions supported this qualitative exploratory case study:

RQ1: How do IDers support adult learning competencies in the workplace education and training contexts they design?

RQ2: How do IDers describe how they support adult learners' acquisition and transfer of material during corporate training?

Conceptual Framework (Qualitative)

The conceptual framework for this study included Bandura's (1997, 2012) theoretical perspective of SE and Knowles's (1980, 1990) theory of adult learning (AL). Asking research questions about how IDers describe their specific behaviors, insights, and understandings required an exploration of agency. Bandura (1997) stated that "agency refers to acts done intentionally" (p.3). Therefore, it was reasonable to view participant IDers' narratives through the lens of SE. Using Knowles's andragogical assumptions provided an established framework of best-practices for understanding the adult learner. Using Knowles' five assumptions (a need to know; learners' self-concept; role of the learners' experience; readiness to learn; and orientation to learning) further uncovered IDer narrative in tandem with Bandura's theories of SE. Kirkpatrick and Kayser Kirkpatrick's (2016) theories on ToL levels and the intentionality of program analysis and design also helped to explore IDer intentionality. By exploring the ID narrative form these theoretical perspectives, intentionality for ToL was reflected through

participant experiences and behaviors when designing content for workplace education and training.

Andragogy (the study of adult learning) and ToL theories relate to the problem of this study by providing consistency and theoretical grounding of best practices for adult learning (Knowles et al., 2015; Pavlova & Sanger, 2015; Green et al., 2015). These theories have the potential to highlight areas where there are gaps in curriculum development and ID while also providing a lens to consider how these gaps may impact ToL in workplace education and training.

Since the earliest recorded philosophers like Plato and Aristotle, adults have had instructional needs be it for basic skills building or questioning larger more abstract concepts (Flinders & Thronton, 2004; Lytovchenko, 2015). However, it was not until the very early concept of andragogy that researchers truly considered the adult brain as something malleable enough to have the capacity to learn through the years of adulthood (Knowles et al., 2015).

The term andragogy was introduced to the United States through the work of Malcom Knowles in the early 1970s who saw andragogy in two different conceptual frameworks: Learner-centric education focused on the need and disposition of the learner alongside processes necessary to create optimal opportunity to consume content for ToL (Knowles et al., 2015; Merriam & Bierema, 2014).

In Europe, the discussions and research on andragogy often met with controversy as a theoretical framework up until the mid-twentieth century, at which time researchers were more open to the acceptance of conceptual frameworks like those grounding adult

learning, which engaged qualitative descriptive methods versus more quantifiable methods associated with traditional theoretical works (Knowles et al. 2015). Researchers interested in the continuation of adults' learning began to discuss the unique needs of this age group outside the scope of pedagogy (traditionally referring to the education of the young) with the understanding that adults potentially had unique needs beyond teacher-centric instructional practices typical of the brick-and-mortar educational practices for youth (Knowles et al., 2015).

It was important to first define what was meant by *adult*, a term hosting a variety of meanings and factors. By the 1960s, andragogy was explored by various disciplines including social psychology, developmental psychology, sociology, and philosophy (Knowles et al., 2015). This has had a great impact on the development of the conceptual framework of andragogy and how the term *adult* was defined as well as how andragogy influences their education. It was not enough to simply categorize children and adults chronologically when it comes to education. It was determined that considerations, or assumptions, regarding an adult's (or any learner's, for that matter) experiences and motivations was important for ToL (Knowles et al., 2015; Merriam & Bierema, 2014).

Research from the social science perspective considering the responsibilities of adulthood including jobs and specific needs of adults who are fully engaged in building their lives including marriage, parenthood, household responsibilities and the need for security led to learner-centric methods in practice for ID and how curriculum content was thought to better motivate adult learners (Knowles et al., 2015; Merriam & Bierema, 2014). Other research camps, like developmental psychology, look at how adults learn as

well as under what circumstances and for what purposes. The focus of this study was to explore adult learning not from the perspective of the learner, but from the perspective of the IDer and what aspect of these foundational concepts and assumptions are used in educating professional adults.

Nature of the Study

This qualitative exploratory case study was situated in the discipline of curriculum and instruction as well as adult learning. Exploring IDer processes and knowledge provides an authentic foundation for descriptive, holistic, and evaluation coding (Saldana, 2016). Data were collected using open-ended interviews of 11 IDers; instructional developers; as well as training and education leadership members. Document analysis of curriculum development processes and analysis of online documentation include, but not limited to, scope and sequence reports, project management documentation, online job descriptions, and online portfolios.

Creswell and Creswell (2018) wrote that qualitative researchers identify a problem and use exploration processes to gain knowledge and insight about the questions they are asking. To expand on the aspect of exploration and interpretative aspect to coding, research questions framed by the pronoun *what* benefit from exploratory case study (Adu, 2019; Yin, 2014). Using a qualitative approach like exploratory case study will help to understand how IDers incorporate adult learning principles specifically and what their level of understanding was regarding pedagogical best practices in general.

Through understanding the perception and experiences of IDers directly using interviews and participant experiences, a holistic understanding of this case study a

deeper understanding about the uniqueness of the individual has been heard (Stake, 1995). Focusing on the practices of IDers adds voice and authenticity to understandings about these topics from an epistemological perspective. An authentic perspective adds to the conversation giving a real-world foundational look at how to best prepare IDers in their curriculum development practices for adult learners as well as how corporate curricula can better be implemented in support of individual career satisfaction and growth.

Definitions

The following definitions and terms were used throughout this study. Several of these terms are often used interchangeably or fall just outside how the term was used in a traditional K-12 educative context. Because the focus of this study was on workplace education and training but could not ignore corporate curricula from the perspective of IDers the following terms needed clarification.

Adult education (AE): AE is concerned with systems in which adults learn as well as the ways in which and reasons why adults engage in continuing education. AE was the predecessor to andragogy and focuses on the organization of assets (lessons, tasks, resources, etc.) for achieving a set of learning objectives as well as content scope and sequence. AE refers to the actions engaged in how adult learners' approach and consume learning opportunities and for what purpose (Houle, 1962; Knowles et al., 2015; Merriam & Bierema, 2014; Tough, 1979).

There are many ways to design, deliver, and consume AE, which encompasses a myriad of modalities adults are exposed to for the purpose of lifelong learning (Knowles

et al., 2015). AE is socio-cultural in nature and has the intention of providing the opportunity through organized learning systems and programs produced to provide adults with optimal opportunities to grow socially, culturally, professionally, emotionally, intellectually and to build their own knowledge and skills reservoirs for overall societal advancement (Houle, 1962; Knowles et al. 2015; Merriam & Bierema, 2014; Tough, 1979).

Andragogy: Andragogy situates the theoretical foundations and methodologies associated with AE as well as how the practice of AE is transferred cognitively (Houle, 1962; Knowles et al. 2015; Merriam & Bierema, 2014; Tough, 1979). However, andragogy is not fully recognized as a theoretical framework, but instead is an approach that supports knowing relevancies and traits for ToL (Knowles et al. 2015).

Benchmarks: Benchmarks are defined performance outcomes based on measurable and observable learner competencies (skills and/or cognitive levels of knowledge) necessary for effective job performance. Benchmarking is part of the ordering of knowledge and curriculum mapping and knowledge construction plans (Wiles & Bondi, 2015).

Corporate curriculum: A corporation's intentional specified plan (goals, methods, assets, assessment) for the learning of competencies necessary for an employee to fulfill a defined job profile and grow within their career (Kessels, 200; Wiles & Bondi, 2015).

eLearning: eLearning refers to self-paced learning modules accessed by learners via a learning management platform for learning and practicing new skills, information,

and knowledge as well as being assessed on level of proficiency based on benchmarks and competency expectations.

Corporate: The term corporate refers to an organized and systematic entity within a specific industry with the purpose of being profitable as well as employment of human capital to produce a product and/or provide a specific service.

Corporate education: Corporate education is the intentional systems approach to support employee knowledge and skills building for specific organizational goals and expectations of employee outcomes. Corporate education takes on many forms and is often tasked with ensuring appropriate compliance training is available for corporate associates to be certified to do their jobs as well as to provide learning opportunities based on learning needs and skills gaps. Corporate education is often the responsibility of HR departments and/or learning and development (L&D) within the organization. Skilled individuals with experience in ID and/or have expertise in the trade are often responsible for the design and development of learning systems and program evaluation. These learning programs may often engage a variety of platforms and designs including, but not limited to instructor lead, eLearning, webinars, workshops, professional development seminars, etc.

Instructional design (ID): ID is the process of taking content and/or information and organizing it in a way that a learner can access, consume, and engage with it for the purposes of gaining knowledge and achieve a desired goal or outcome. The ID process provides a foundation of best practices to determine how to organize the content and/or information using appropriate methods, assets, resources, and stakeholders to ensure an

end learning product that is beneficial for the ToL and information (Piskurich, 2015). It is very similar to curriculum development but is more typical for adult educational situations.

Instructional designer (IDer): An IDer is an individual tasked with doing the actual work of creating the structure/system of learning (teacher, facilitator, developer, IDer) using models of best practice for learning and ID to scaffold and create the system of learning based on a required situation. This occupation suggests its own set of competencies and set of credentials; it is often not inclusive of all that an IDer does when considering the project management aspect of this profession (Williams van Rooij, 2013).

Learning: This study considers Gagne's (1985) definition of learning which argues that learning is transformative in how a person behaves and is consistent over time as seen through knowledge in action. Learning is actionable not just for growth in a body of content, but for the ability to sustain compounding levels of knowledge, skills, and actionable behaviors (Merriam & Bierema, 2014). Additionally, learning will be understood to be a socially constructed purposeful endeavor on the part of the learner involving and affecting how we think, behave and approach daily life and relationships (Merriam & Bierema, 2014, p. 25). Essentially, Kolb's (2015) working definition for learning as conceived through the lens of experiential learning, which posits that learning is a transformative based on life experiences and choices. Learning is an intentional, continuous social and reflective process.

Self-efficacy (SE): Using Bandura's (2012) social cognitive theory of SE, people's sense of self is both self-reflective and self-influenced. This is in opposition to theory that

the self is divided between the physical and social constructs of self. Instead, the self is melded as "simultaneously agent and object" (p.5). Who humans perceive themselves to be and how they interact in social constructs is an action of self all of which are socially constructed.

Transfer of learning: ToL is the actual application of cognitive knowledge and skills training and the ability to apply that knowledge in new situations (Kirkpatrick & Kayser Kirkpatrick, 2016; Perkins, 1992).

Work place learning: Work place learning is the intentional and planned system of presenting workplace education and training to employees. It includes, but is not limited to, processes and methods used to support optimal skill implementation for specific organization job profiles (Lewis, 2017; Singh, 2016).

Assumptions

For this research study, it was assumed that IDer participants were active in their field using tools to design and develop workplace education and training assets for professional adult learners. It was also assumed that they were familiar with curriculum development and have experience in planning learning opportunities using an assortment of tools and strategies to transform skills/knowledge content into developed workplace education and training modules/programs/deliverables for the use of professional adult learners. IDer participants were specifically required to have created instruction for any of the following platforms to design and develop training content for professional adult learners' skills growth and content knowledge for job performance expectations:

Instructor-led training; eLearning; simulation/scenario training; hands-on training; distance learning educational programs (webinars); manuals and information text.

Participants for this study volunteered to answer interview questions factually and honestly and are assumed to be active in this topic and career path. In addition, it was assumed each of the participants had experience in the skills required for their jobs. While it was assumed that many participant credentials were achieved through an academic institution, these credentials may also come from other professional organizations, associations, experiences, and/or memberships.

Scope and Delimitations

Being intentional with the selection of participants for this study was important to control the scope of this study. All participants, except for two, were from Midwestern corporate settings and were tasked with creating curriculum for professional adults in the workplace. IDers can be found in many industries. However, for the purposes of this study, the scope was chosen because the objective was to gain a deeper understanding about the knowledge and skills as well as ToL perceptions as understood by IDers for professional adult learning and training initiatives.

This scope and delimitations were chosen out of an interest to better understand an untapped research area. Being able to learn more about experiences and perceptions of IDers gives an authentic insight that could be used to facilitate building a foundation in support of more effective adult learning opportunities.

Limitations

Purposeful sampling was used in support of the generalizability of this study as well as the use of a smaller sample sizes (Creswell & Poth, 2018). Both were relevant to this study, which required a smaller number of participants to allow for more lengthy narrative in support of deep description and coding. However, this did present limitations to the study and the ability for random generalization as was common in larger participant studies. To address these limitations, each collected data source were carefully documented and reviewed. Under different circumstances, researchers and participant outcomes may have different biases and analysis outcomes. To not diminish the study, attention to the intentionality in sample choices was a key aspect to promote validity, which also helped address limitation concerns (Creswell & Poth, 2018). Through thick descriptive language the analysis of participant interview responses as well as researcher rationale, issues concerning transferability, and transparency of limitations were reviewed, analyzed, and discussed.

Significance

Many private and public learning entities in the United States offer courses in support of adult learning and professional growth. Yet, these training tracks typically are not focused on engaging the theories and best practices of human capital development and its potential for negative global impacts and how citizens will effectively respond to current and new industries (Tsatsaroni & Evans, 2014). Human capital, while controversial as an institutionalized term, has an established foundation as being an

important financial marker, making education and training a budgetary line item of which to take notice (Becker, 1994).

Study Contributions That Advance Knowledge and Practice

It has been common for academia to study learning and curriculum development through a qualitative lens. However, based on literature reviewed for this study, this was not the case for research focused on workplace education and training. Research methodologies used for workplace education and training has been dominated by quantitative studies focused on participation outcomes and levels of learner reaction (Kirkpatrick & Kayser Kirkpatrick, 2016; Lancaster et al., 2013). Researchers have posited the need for studies that move the canon of knowledge in the direction of the trainer and design perspective and practices to move beyond mere measurement of ToL and adult learning towards solutionary interventions and protocols (Baisya & Semolic, 2013; Bates et al., 2012; Green et al., 2015; Nafukho et al., 2017; Renta-Davids et al., 2014).

The intention for the exploration of this topic through a qualitative study was to add new voices and perspectives to curriculum, instruction, and assessment, to include IDers of workplace education and training. Specifically, findings from this study have the potential to advance the practice of IDers and those responsible for ensuring ToL in professional adult learners by exploring the transfer problem through a different lens and methodology. This supports new understandings about concepts of ToL in support of filling gaps indicative of the transfer problem (Nafukho et al. 2017; Renta-Davids et al.,

2014) and in support of adult learning assumptions (Knowles et al., 2014; Merriam & Bierema, 2014; Pavlova & Sanger, 2015; Zepeda et al., 2014).

There are benefits to exploring the processes and theoretical grounding of those tasked with instructional and curriculum design and development. Having a deeper understanding about how IDers themselves actively engage best practices as well as defining what best practices are necessary for creating workplace education and training assets in support of professional and skills-based growth in adult learners. It was relevant to focus this study on how IDers engage andragogical principles for designing workplace education and training including corporate curriculum to better support the known ToL problem (Baldwin & Ford, 1988; Nafukho et al., 2017; Renta-Davids et al., 2014). Findings from this study add to current conversations suggesting the need for more research that explores the processes of adult education in workplace education and training and the ToL. This includes research that allows for a stronger understanding about corporate educational programs (methods, assets, evaluation) and the design of learning programs and how they are accessed by adult learners (Renta-Davids et al., 2014).

Implications for Positive Social Change

For this study, adult learning theories and models were explored, including andragogy and transformative learning/ToL. As an active member in the design and development of corporate curriculum as well as having a personal stake in grounding programs to promote professional adult growth in sound pedagogical and andragogical practices, this study was important to understanding ways to shed light on an untapped

area of deep academic study in the support of lifelong learning and promotion of professional SE and fulfillment lending itself to positive cultural capital.

For this study, it was assumed that employment was an essential life reality in the United States and provided opportunity for not only cultural capital, but also promoted a sustainable lifestyle for survival, happiness, and personal self-worth. A professional adult is required to have understanding around general and specific content of topics in relation to their workplace. Professional growth was understood to often be contingent on lifelong learning (Gordon, 2018; Milhem et al., 2014).

Because employment has such a critical impact on an individual's circumstance and life, it could be argued that knowing how to provide workplace education and training through ID and continuity in practice is an important research subject. There are no agreed upon standards within the ID industry for IDer competencies, leaving professional adult learners as well as IDers, who themselves are lifelong learners, in muddy, uncertain waters, thus threatening professional growth. Inequities in employment are problematic for all stakeholders, at all levels. Equally inequitable is not having a basic framework of understanding about competencies for ID programs to ensure those certified as such have some commonality and foundational practices. The lack of this suggests a gap in pedagogical ethical practices.

Summary

Emerging research focused on how IDers apply their knowledge has become a growing focus of research as more IDers are graduating with degrees in this content area. The training industry has experienced a growth equating to higher budgetary spending for

workplace education and training (Training Magazine, 2017). A review of literature also revealed a potential knowing-doing gap in workplace education and training suggesting a link to the ToL problem (Pfeffer & Sutton, 2000). Professional adult workplace success has proven to be contingent on SE and the ability to engage in consistent and sustained learning (Gordon, 2018). Based on this, it was reasonable to posit the importance for IDers to effectively prepare workplace education and training/corporate curricula in support of lifelong learners' professional education that supports ToL (Milhem et al., 2014).

In Chapter 2, research literature exploring theories and case studies relevant to the IDer profession, andragogical theoretical grounding, and learning theories indicative of and for ToL was reviewed.

Chapter 2: Literature Review

In 1913, Thorndike began to speak on and identify what he termed the ToL problem while engaging in research specifically focused on ToL and behavior (Baldwin & Ford, 1988; Burke-Smalley & Hutchins, 2007; Ford & Weissbein, 1997; Hutchins, 2009). Figure 1 (Ford & Weissbein, 1997) below provides a visual representation of the structure required for ToL.

Figure 1

Model of Training Transfer (Ford & Weissbein, 1997)

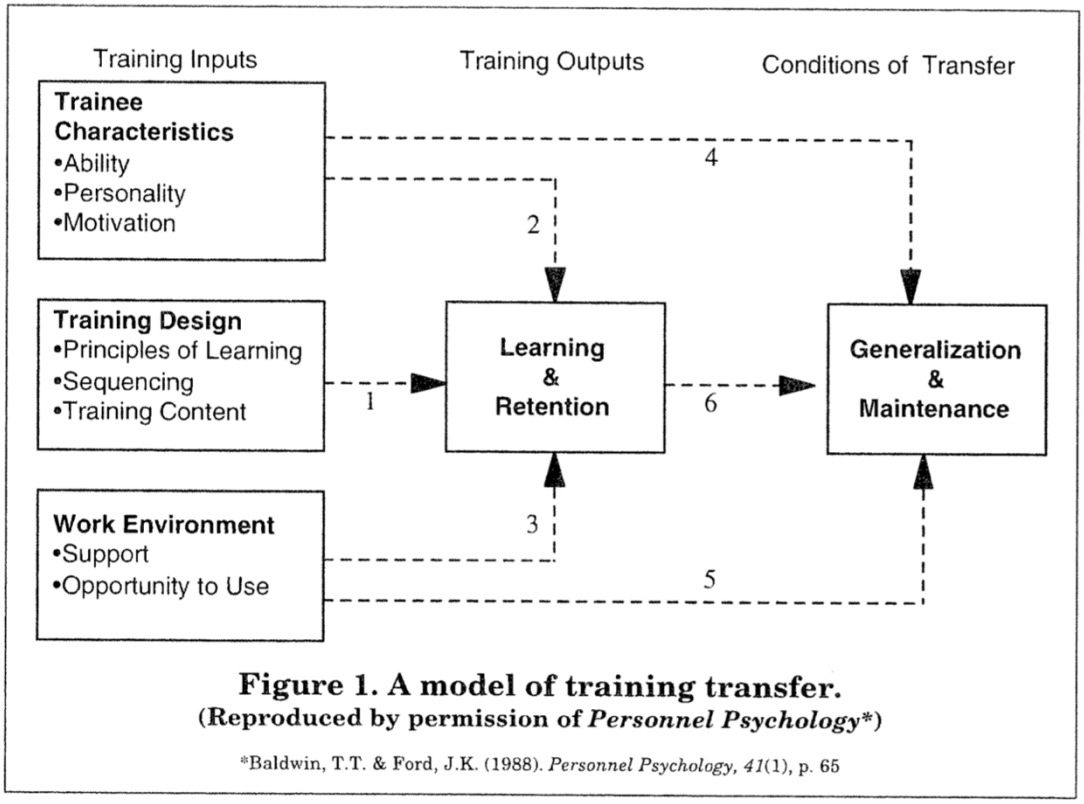


Figure 1. A model of training transfer.
(Reproduced by permission of *Personnel Psychology)**

*Baldwin, T.T. & Ford, J.K. (1988). *Personnel Psychology, 41*(1), p. 65

As seen in Figure 1, many factors play into the transfer problem including the design of learning assets (Ford & Weissbein, 1997). The model presented by Baldwin and Ford (1988) provided a framework to examine ToL research. In this model, Baldwin and

Ford posit there are three training inputs foundational to learning and retention, which along with generalization and define the conditions for ToL. For this study, the Baldwin and Ford model provides a way to examine the connection between training design and work environments as discussed by active IDers as well as highlighting the silence of those voices due to a lack in studies considering the variable of who was doing the training design, even though the training design itself was an important factor of ToL.

This study explored the problem of low ToL outcomes and limited skill-set sustainability despite a growth in ID practices for professional adult learning. Workplace education and training has proven to be costly for business (Blume et al., 2010; Gurchiek, 2022; Moore et al., 2022; Nafukho et al., 2017). According to one recent study on the state of the training and development industry reported that in 2021 corporations with 10,000 or more employees spent $1,656 per employee for training. Yet, there was a drop in the number of hours employees engaged in professional workplace education and training, which was down from 35 in 2020 to 32.9 in 2021 (Moore et al., 2022). This shows a potential gap in dollars spent on developing workplace education and training versus professional adult engagement in professional development within corporate L&D initiatives.

In addition, ineffective ToL impacts employees and has the potential to create inequitable and stagnant professional growth, all of which implicates personal happiness and economic growth for both the workplace and employee (Gurchiek, 2022; Hutchins, 2009; LinkedIn 2023 Workplace Learning Report, 2023; Moore et al., 2022). According to the LinkedIn 2023 Workplace Learning Report (2023), workforce skills building has a

direct influence on employee retention and stated that 75% retention rate of employees who were provided skills building that afforded them the opportunity to grow in the company versus 56% who did not receive this benefit and opportunity.

The purpose for this exploratory case study was to gather first account experiences and conversations with IDers as well as their perceptions of how they create educational and training assets in support of adult learners' competencies and ToL in the workplace.

In this chapter, available literature relevant for this study was reviewed. A description of search strategies used has been included to identify current research relevant to this study as well as conceptual frameworks. Discussion of literature focused on workplace training, ID theories, and research focused on IDer judgments and values has also been included. In addition, a brief overview of literature around the topic of competencies research, workplace education, IDer research as well as foundational research on andragogy and TOL was included. Finally, this chapter concludes with an overview of emerging major themes and gaps in support of the relevance for this study.

Literature Search Strategy

The search for literature was grounded in peer-reviewed journals identified through Google Scholar searches as well as through data bases accessed through Walden University's library Education Source and Thoreau Multi-Database. Research was also conducted on EBSCO Host, ERIC, ProQuest, and SAGE Journals, especially when specific articles were sought out based on snowball methods applied to article resource pages. Branching out from an educational pool and considering many articles were

grounded in academic settings, it was decided to also search the Business Source Complete and PsycINFO data bases. Over 324 articles were located using the following Boolean/phrase approach: Corporate curriculum, instructional designer, workplace training, corporate education, human capital, instructional design theory, instructional designer/corporate, instructional designer/adult learning, adult learning/andragogy, curriculum development/adult learning, instructional designer/curriculum development, ToL/training. Further, the following restrictions were also applied: (a) only studies between 2014-2019; (b) journals had to be peer-reviewed.

Abstracts were reviewed using the following delimiters: (a) it was a study done in the U.S. (this was loosened based on the lack of U.S. studies found); (b) participants were IDers or in some capacity designed curricula for adult learners; (c) focused on instructional design/curriculum development/workplace training/training. Originally, it was intended to only review articles focused on workplace training in corporate settings. However, many studies were grounded in academic settings but held value for review of theory and current trends as well as discussions of further research needs.

Conceptual Framework/Theoretical Foundation

The conceptual framework for this study includes Knowles' (1980, 1990) theory of adult learning (AL), which puts forward five assumptions for adult learning as being: (a) a need to know; (b) the learners' self-concept; (c) the role of the learners' experience; (d) readiness to learn; and (e) orientation to learning. Using Knowles' andragogical assumptions provides an established consistency of best practices for curriculum development, which will help to see potential inconsistencies of instruction and to locate

gaps that could be at the root of low ToL among adults active in workplace education and training. Research questions posed for this study were developed to explore how IDers consider, discuss, and apply ID concepts in support of ToL.

Andragogy and ToL theories help to highlight researched and accepted theories as well as practices attuned to the needs of professional adult learners. Understanding grounding theories and principles that have been researched and established as theoretical frameworks are an important foundation on which to establish this study. By providing real experiences and in-depth insight from those responsible for the planning and design of professional adult learning assets, expert voices are added to the conversation on issues of ToL in workplace education and training. Theoretical camps on learning contain a wealth of research from which to gain knowledge. However, missing voices and perspectives still exists in the pedagogical canon. There is a need for more studies to better understand why there continues to be a gap between corporate curricula and ToL despite increased initiatives as seen in the uptick of L&D budgets for workplace education and training (2017 Training industry report, 2017; Giacumo & Breman, 2015; Moore et al., 2022; Nafukho et al., 2017). Current conceptual frameworks can provide a foundation on which to expound IDer practices, experiences, and perceptions about what they do and how that may influence ToL.

Literature Review Related to Key Concepts and Variable

Andragogy/Adult Learning

Research on andragogical models and processes has historically focused on academic perspectives concerning emerging learners between the ages of eighteen and

twenty-five versus non-traditional learning environments like corporate training and those identified as mature adult learners (Dachner & Polin, 2015; Knowles et al., 2015). Adult and continued education (ACE) studies was the research focus of Zawacki-Richter et al. (2014), who conducted a quantitative study to better categorize and pin-point critical areas of ACE and to identify areas where research has yet to be conducted.

In their article, Watkins and Marsick (2014) explained the historical foundation of adult education as being grounded in a varied canon of research theories all of which suggest all learners come into their understanding about the world through their experiences and the construction of knowledge. Humans learn by doing and building bridges between that which is known and that which is explored and transferred as new understanding. For this to happen specifically for adults, there must be relevancy, choice, self-actualization, and learning must be timely (Knowles et al. 2015). It was interesting to fathom that it was not until research done by Thorndike et al. in 1928 that it was considered that adults had the capacity to learn and the realization that age did not mean an automatic cognitive decline (Merriam & Bierema, 2014).

Understanding that adults have the capacity to learn is no longer a question but an understood reality that holds lasting implications for workplace education and training and L&D departments tasked with educating and training employees in promotion of organizational growth and sustainability. To compete globally, corporations must maintain and invest in their human capital by developing qualified professionals capable of carrying out required skills and foundational knowledge (Becker, 1993; Green et al., 2015; Senjur & Acar, 2013). Adult learning is a corporate concern and major budgetary

factor for L&D departments tasked with creating learning opportunities in a myriad of venues using a diverse set of assets via in-house instructional development or utilizing costly professional training consulting agencies in support of adult learners' professional growth (Green et al., 2015).

The purpose for this exploratory case study was to gather first account experiences and conversations with IDers as well as their perceptions of how they create educational and training assets in support of adult learners' competencies and ToL in the workplace. Using a qualitative case study methodology, I was able to explore the perceptions of the IDer through a humanistic and behavioral lens, which adds a different perspective to the current body of research. By considering this perspective, research questions were created that focused on engaging conversations about how the constructs of training design influence professional adult learners. Results from conversations in response to the posed questions provided insight into ID practices implemented for adult learners. It was important to remember that all adult learners have unique instructional needs, reasons for learning, and goals including the IDer creating learning for others (Dachner & Polin, 2016; Knowles 1977; Knowles et al., 2015; Pavlova & Sanger, 2015).

In his historical foundational work around adult learning, Knowles (1980, 1990) stated that what he proposed was a set of assumptions that, while different from the pedagogical model, in fact encompassed the pedagogical model but from the perspective of what adult learners require. He went on to posit the need for further research to answer questions regarding andragogy and its appropriateness as a model for the ways in which adults are trained and educated (Knowles, 1980, 1990). The complexity around adult

learning and andragogy is reasonably due to the reality that there are many forms of learning and can be categorized as formal and informal (Merriam & Bierema, 2014). Workplace education and training is an informal form of learning, taking on a variety of forms and modalities (Merriam & Bierema, 2014). Because of the suggested informality of employee knowledge and skills acquisition, there is a risk for workplace education and training to live outside intentionality. A lack of intentionality is in danger of being the catalyst for learning goals founded on assumptions longtime at play in a corporate culture or the this is how it has always been done, folklore. The IDer has the potential to provide the grounding inherent with intentionality and is worthy of deeper study to understand how ToL could benefit.

Adult learning theories involve complex models of practice that are important to understand to fully appreciate the nuances of the andragogical perspectives and the differences between strategies, assumptions, and models of practice (Gagne et al., 1992; Honebein, 2017; Knowles et al., 2015; Merriam & Bierema, 2014; Piskurich, 2015; Zawacki-Richter et al., 2014). IDers can utilize these strategies, assumptions, and models of practice to better perform their tasks as designers of instructional programs that effectively and consistently provide adult learners with what they need for professional growth (Knowles et al., 2015).

Andragogy, at is core, consists of six assumptions regarding the adult learner, of which those designing instruction for professional adult learners should consider. These principles define adult learners as…

- having an innate capacity for self-directed learning due their ability for self-concept;
- coming to their learning with previous experiences (life, work, relational), which can be tapped into to support bridging new learning, but may also be a source of contention and resistance to learning;
- learning best when content is relevant in supporting a specific requirement and/or interest;
- wanting timely and immediately available learning;
- needing to be involved in the development of learning to support their need to know how, why, and what they will learn; which in turn helps with the final principle;
- intrinsically motivated to learn when presented curriculum is purposeful and provides a means to a specific end directly impacting the professional adult learner's life (Dachner & Polin, 2016; Knowles et al., 2015; Merriam & Bierema, 2014; Pavlova & Sanger, 2015; Zepeda et al., 2014).

These principles also align with ToL theories, discussed later in this review of literature, and relate to the problem of this study by providing a consistent way in which to consider effective development of any variety of curricula for professional adults' workplace education and training.

Experiential Learning

Experiential learning has its foundations well established in the historical canon of educational research and the following theories: William James's radical empiricism;

Kurt Lewin's action research; Carl Rogers's self-actualization through the process of experiencing; Carl Jung's development from specialization to integration; John Dewey's experiential education; Jean Piaget's constructivism; Lev Vygotsky's proximal zone of development, Paulo Freire's naming experience in dialogue; and Mary Parker Follett's learning relationship creative experience (Kolb, 2015).

Adult learners come to their education and training with an already established foundation of knowledge and learning experiences including what they have experienced in everyday life and work (Dachner & Polin, 2016; Knowles et al., 2012; Merriam & Bierema, 2014). Experiential learning puts a learner's experience as a central construct for learning, which differs from other learning theories like behaviorism and those focused on cognitive manipulation as it involves an understanding about the assumptions surrounding the processes for learning over outcomes of learning (Kolb, 2015). This would seem to not align with Knowles's assertion that implicates adults are focused on end goals, or outcomes, and the assumption that adult learners are intrinsic learners who are self-directed and only focused on obtaining specific goals (Zepeda et al., 2014, p. 300). However, as stated, an adult's experiences are important as a vehicle to bridge old knowledge with new knowledge transferred to new behavior and/or cognition all of which implicates a process would be necessary for learning transfer to take place and could be evaluated.

Poore, Cullen, and Schaar (2014) conducted research in a nursing training program and discuss Kolb's experiential learning theories to explore the need for more effective ways to support adult learners by engaging a simulation based instructional

platform. Poore, Cullen, and Schaar (2014) posit authentic experience supports higher gains in required professional tenants through experiential learning practices and the use of simulations.

When considering transformative learning, authentic experiences are important as this is the junction where the learner questions an assumption, or perceived understanding about something requiring them to reevaluate and enter the learning spiral to reflect (Kolb, 2015). This implies active learning is important for the adult learner to transfer knowledge and suggests a necessary process for the design of instruction, which aligns with andragogical assumptions (Knowles et al., 2015).

ToL

ToL, sometimes referred to as transfer of training, continues to be a challenge for the workplace and HR development goals for optimal returns of investment around skills training. IDers are trained to seek out gaps between employee performance and corporate expectations and to then create learning opportunities using learning theories as well as curriculum design methodologies to promote high levels of training transfer. However, if research suggests a ToL problem and low returns on training investments it is reasonable to explore how ToL methodologies and theories are being engaged in practice. Knowledge is argued to be a commodity in the 21st century and "education and skills of the workforce…a key competitive weapon" for corporations' competitive profiles (Senjur & Acar, 2013, p. 22).

Because of this urgency, training has become a focus for HR and development and workplace education and training has seen an increase in the need for training, but

struggles persist with ToL and being able to account for the return of investment required of training an entire workforce (Ahmad, 2014). Research around ToL points to the training design as the most influential component on how a learner will turn training into a cognitive understanding and mastered skill (Ahmad, 2014; Dirani, 2017; Lim, 2000; Poell, 2017). Because workplace education and training are often pointed to as the culprit in problems associated with ToL, how IDers engage their practice is, at the very least, a causational factor in the ToL problem (Nafukho, Alfred, Chakraborty, Johnson and Cherrstrom, 2017).

ToL research typically focuses on the need for holistic ID that allows for authentic practices of a skill and/or process, which require behavioral changes (Kolb, 2009; Poell, 2017). Focusing only on the skill, or task, and providing information about how to perform that task is not enough to promote ToL and behavioral changes indicative of ToL (Kirkpatrick & Kirkpatrick, 2005).

Curriculum Theory and Development

In Latin, the word curriculum means a race-course (Flinders & Thornton, 2004; Wiles & Bondi, 2015). Curriculum is complex as it encompasses the intentional planned collection of activities a learner would be exposed to for the intent of transforming educative experiences into new knowledge and/or skills (Flinders & Thornton, 2004; Tyler, 2013; Wiles & Bondi, 2015). From this perspective, curriculum is the planned learning in an educational process or system. For the purposes of this study, education has been considered as a process whereby an individual is in some way, behaviorally or cognitively, changed or transformed as they engage new knowledge through a determined

process (Flinders & Thornton, 2004; Langendyk et al., 2016; Tyler, 2013; Wheelahan, 2015; Wiles & Bondi, 2015).

There are a variety of methods in which curricula can be developed including linear designs and those that are more intuitive to the learner's needs and use a more iterative design (Wiles & Bondi, 2015). Some curriculum designers begin with the end in mind and consider the learner's journey as the core factor in what approach will be most effective (Wiggins & McTighe, 2005). This is a learner-centric design (Cullen, Harris, & Hill, 2012). IDers developing learner-centric curricula put the learner's experiences as a starting point for engaging activities as well as a resource so a learner can be an active member in their own learning thus promote ToL through choice making engagements (Cullen, Harris, & Hill, 2012). As previously discussed, this aligns with adult learning theories and the assumption that adults prefer choices and active participation in their learning.

A political subjectivity inherent in curriculum development has to do with the reality that it is humans who design and plan content for learning and humans bring with them their own beliefs and ideologies about the purposes of education, including hegemonic norms (Apple, 2008; Cullen, Harris, & Hill, 2012; Wheeler-Bell, 2017). These beliefs, assumptions, values, and hegemonic norms can covertly, and sometimes overtly, seep into the curriculum. This is certainly true for workplace education and training where a curriculum is directly impacted by corporate goals and objectives. The institution of education, specifically in a K-12 context, often holds the purpose of assimilating young learners into citizens in support of social order and contribution

including being active in the workforce (Apple, 2008; Wheelahan, 2015; Wiles & Bondi, 2015). Equally true, social-cultural changes as well as a solidified local culture, including a corporation's culture, inevitable guides the local curriculum. This is true when looking at the history of curricula, which reveals a society's curriculum to be indicative of values and norms (Cullen, Harris, & Hill, 2012).

Educational theories provide frameworks from which purposes of education are often defined as well as foundational ideologies guiding their principles. Because of the philosophical and theoretical complexity of education, curriculum development is most effective when an expert with a deep understanding of learning theories, curriculum theory, and ID methods oversee aligning content with the stance of the institution regarding intent and purpose of and for education (Wiles & Bondi, 2015).

Traditional curriculum development has been criticized as being rote and lacking intentionality, often leaving little room for individuality of specific learner needs (Wiggins & McTighe, 2005). Curriculum designs are influenced by hegemonic norms, overtly and covertly. Either way, curriculum should promote alignment with democratic values, but often are subjective to hidden-curriculum due to a lack of transparency of the status-que and hegemonic norm (Wheeler-Bell, 2017; Wiles & Bondi, 2015).

By engaging a more constructivist approach, and being more learner-centric in ID processes, there is a chance to diffuse inequities of hidden curricula within a corporate L&D culture. This could be done by creating curricula that considers learner experiences, needs, and knowledge gaps in relation to where a learner needs or wants to be at the end of a learning event. Through intentional planning and back-tracking to build the unique

scaffold necessary to reach specified learning outcomes a more transparent and relevant learning experience could prove to have more effective ToL (Cullen, Harris, & Hill, 2012; Wiggins & McTighe, 2005; Wheeler-Bell, 2017; Wiles & Bondi, 2015).

IDers philosophical beliefs about the purposes of education and the need for intentional curriculum planning will impact workplace education and training and much like the importance of the teacher in a K-12 setting is equally viable for professional adult learners (McEdwards, 2014). Defined purposes of education are generally those of the institution and may or may not align with IDer philosophical beliefs, or those of a learner (Apple, 2008; Wheeler-Bell, 2017; Wiles & Bondi, 2015). Exploring these dynamics has the potential to provide a deeper understanding about where there are tensions and what that means for the ToL problem.

Instructional Design Principles

The organization of learning events is an important step for optimal learning. Gagne, Briggs, and Wager (1992) provide foundational research in the study of ID and learning situations. ID is a method, practice, and process used to organize content and information for the purposes of facilitating learning (Dachner & Polin, 2016; Gagne, Briggs, & Wager, 1992; Honebein, 2017). By engaging an intentional and systematic design of instruction, using models and methods of best practices, ID could ensure learning programs are produced in a way that promotes optimal impact and outcomes for those who engage and consume the final product (Dachner & Polin, 2016; Gagne, Briggs, & Wager, 1992; Honebein, 2017). This requires a specific set of competencies of those tasked with the doing of ID, typically referred to as IDers.

Due to the increased use of ID methods for workplace education and training as well as the growth of available online learning in K-12 and higher education, there has been a growth in interest in the ID profession and methodology as well as research around IDer competencies (Goksu et al., 2017; Klein & Jun, 2014). IDer competency research posit that various ID professional associations have identified and promote specific performance competencies that are understood to be important including making them requirements for certifications (Magruder, O., 2019; Richey et al., 2001. These same researchers also argue the importance of ID professionals having these competencies as the ID of a learning situation is critical to the success of learners' cognitive outcomes (Klein & Jun, 2014; Magruder et al., 2019; Richey et al., 2001).

Because of the importance in design of instruction including all aspects of the design (where, what, how, who and why) for adult learners, researchers are conducting studies to learn more about the systems and methodologies being used as well as asking about methods of practice and the proficiencies they bring with them. Qualitative case-studies using interviews and questionnaires for data collection have shown to be the most popular research methods with results positioning ADDIE; ARCS; Dick and Carey; and Gagne and Briggs as the preferred ID models in use. Each of these designs provide a systems approach to ID as well as posing learner-centric ideologies grounded in constructivists theoretical camps (Gagne, Briggs, &Wager, 1992; Goksu et al., 2017; Klein & Jun, 2014; Williams van Rooij, 2013).

It is the job of the IDer to develop curriculum and instruction for supporting adults through corporate education situations for competency and cognitive development

(Goksu et al., 2017). However, standardization in the public education sector has proven to be full of contentions from all stakeholders and it makes sense this would be the outcome in workplace education and training as well. The questions being asked in this study are focused on the actual doing aspect of IDers and their application of ID theories and support for adult learners. Gagne et al. (1992) posit, "instruction for the support of learning must be planned rather than haphazard. The learning it aids should bring all individuals closer to the goals of optimal use of their talents, enjoyment of life, and adjustment to the physical and social environment" (p. 4). This study was designed to engage the perspective of ID professionals to better understand their role and impact on used ID systems and methods.

Workplace Education and Training

Singh (2016) considers corporate training to be that which an organization does to create defined instructional programs to present content for employee skills and competencies building. Some corporations design their workplace education and training in house, while others outsource to professional ID firms. Workplace education and training for professional adult learning is typically in answer to some skills or knowledge gap and has the expected outcome of specific ToL (Milhem et al., 2014). Because there is such a need to apply appropriate methodologies for ID, it is important for IDers to understand training theories to best be able to engage intentionality in how they apply appropriate needs assessments and content analysis to develop training that is appropriate for the defined need and/or gap (Milhem et al., 2014).

Developing employee skill-sets, competencies, and knowledge are critical focal points in corporate industries as well as grassroots skill trades relying on human capital for sustainability. Professional development promotes professional confidence thus solidifying positive professional identities and overall happiness and success in the home-work life balancing act. Experts in the field of adult education as well as learning and development suggest there is a negative trend pointing to ineffective workplace education and training, which typically does not support sustained knowledge, skill, and competencies (Nafukho et al., 2017; Singh, 2016). The idea of a standardized set of ID and IDer competencies, for workplace education and training, is an area of debate and argued to be too complex an idea based on workplace differences and the wide array of skill and knowledge needs (Botma et al., 2015; Garavan & McGuire, 2001). This argument works as an undercurrent to ID research and ID industry norm evolvement as well as provided merit to this study.

Roth et al. (2014) suggest a theory-practice gap exists around knowing-that vs knowing-how and is a natural consequence due to the division between academic institutions and the workplace. Bridging the gap between academia and other learning situations like workplace education and training supports the praxis of learning and authentic engagement. This aligns very well with current research focused on IDers themselves and studies being conducted to learn more about how judgment and values as well as personal philosophies impact the choices made by IDers (Boling et al., 2017; Campbell et al., 2015; Honebein & Honebein, 2015; Honebein, 2017).

The cost of workplace education and training has grown exponentially requiring corporations to find more cost-effective ways to engage their employees in workplace education and training. This has resulted in a growth in eLearning versus face-to-face course offerings and what Nafukho et al. (2017) refer to as a transfer problem due to "training investments continue[d] deficient results" (p. 349). It is suggested that there is a need for more studies focused on transfer of training and workplace education and training.

Human Capital

For decades now returns on investment (ROI) have measured low for workplace education and training outcomes (Gordon 2012). In fact, Gordon (2012) argued "considerable doubt prevails across the American business community that employee education is in any way a driver of business profit" (p. 53). Human capital is most impactful when employees can perform as expected for specific outcomes. Training employees is a necessary system for optimal sustainability and growth of an organization and knowing how to best engage learning theories will better support human capital ROI (Gordon, 2012; Kraiger & Ford, 2021; 2022 State of the Industry Report, 2022; Yunus et al., 2022). for its lack of sustainability when it comes to proficiency levels of knowledge, skills, and capacities of employee development. For example, training is often focused on information giving and does not instigate the use of instructional best practices in the way of curriculum design, instructional practices, or theories of learning.

Gordon (2012) argued that systems for the application and development of corporate learning require systems that are intentional and aligned with company goals to

optimize investment in human capital. Certainly, the use of the term human capital from a social and historically institutionalized perspective offers an area of debate and the dehumanization implications historically (Becker, 1993). However, from a purely organizational perspective human capital and the investments provided for employee skills growth and intellectual development is important and is but one lens to consider the field of ID and IDer perspective impact on workplace education and learning.

Current limited vision for professional growth of human capital, as seen in corporate training models, will be problematic and lack ability to address learning gaps and professional productivity (Gordon, 2012). Employee training and development is a key factor in organization success making eLearning methods of ID and delivery an important researched area to add value in the improvement of learning and development for some areas of corporate training, (Becker, 1993; Gordon, 2012).

Underlying this study are aspects that align with human capital research as well as adult learning and curriculum development. When considering the growth of a community or the societal workforce, human capital and curriculum development will be industries dependent on adult learning theories and methods to carry out goals and outcomes of their business model. This would include industries like teacher education, tasked with providing highly effective educators within private and public educational systems, as well as corporate learning and development departments tasked with recruiting and promoting skilled professionals. Both professional industries are responsible for the growth and knowledge of professional adults within a local and global society.

Tsatsaroni and Evans (2014) posit that the changing global market requires a nation to be prepared, which will require life-long learning models including educative programs and training models to change to keep up with global human capital needs. It is no secret that there is a high turnover rate among qualified teachers leaving the industry. Dachille and Ruff (2017) reported that 46% of teachers leave after five years of service. In 2023 this shortage of teacher trends has continued to grow with many former educators turning to ID as a new career.

When considering workplace education and training, it is reasonable to look at ROI data and yearly investment put into adult learning initiatives. In the United States, several billions of dollars are allocated for corporate training (Salas et al., 2012). Salas et al. (2012) posited that when training is deliberate and properly designed it has a positive impact on helping eradicate errors in practice and promoting corporate growth and "decisions about what to train, how to train, and how to implement and evaluate training should be informed by the best information science has to offer" (p. 74). The thirty-sixth year's Training Industry Report study conducted by Training Magazine (2017) shows that companies spent an average of $1,075 in training expenditures per learner in 2017 and learners spent an average of 47.6 hours in training. Organization budgetary norms, including profit and nonprofit organizations, show an average of $5,372,886 was allocated for training.

IDer Competencies

A quantitative study conducted by Tisdell, Wright, and Taylor (2016) surveyed 226 adult education faculty and conducted textual analysis of adult learning websites to

learn about adult educators and their dispositions as well as their engagement with the Commission of Professors of Adult Education (CPAE). Their findings suggest that many professionals responsible for the design and application of adult learning are not engaged with CPAE. It was learned that adult learning educators are typically degreed with an MA or higher and the majority are satisfied with their positions. What is not understood is how IDers responsible for workplace education and training align with these findings.

In workplace education and training the IDer is responsible for the way in which activities will be engaged, and for what purposes, through their curriculum design. Doing this with intentionality is important because the use of andragogical assumptions allows for a process whereby adult education will benefit from this type of intentionality (Dachner & Polin, 2016).

Tisdell, Wright, and Taylor (2016) suggest there is a need for further research that includes asking how and why faculty of adult education engage their practice as well as research that considers the social capital aspects of adult education and the increase in faculty participation in building knowledge.

Summary and Conclusions

Although there has been research done in areas concerning the education of adult learners in the workplace there has been little research done specifically focused on examining those tasked with developing curriculum, designing instruction, and ensuring ToL. The work of an IDer is complex and yet, it is unclear how they engage best practices for their design of workplace education and training. Even less is known about the perspectives of IDers, which researchers suggest has the potential to covertly influence

the effectiveness and relevancy of curriculum, thus workplace education and training. As reported in literature, this has far-reaching implications for corporate organizations faced with global competition and high expectations from professionals entering the workforce who expect effective and engaging workplace education and training protocols and opportunities.

Chapter 3: Research Method

Researchers suggest more thoughtfully planned curricula promote a higher ToL as well as being supported by andragogical best practices (Kirkpatrick & Kayser Kirkpatrick, 2016; Knowles et al., 2015). This chapter begins with an overview of the research design and rationale information engaged for this study. Included in this chapter is information on the role of the researcher. A description of the research methodology including participant selection information and proposed data analysis are also included.

Research Design and Rationale

Qualitative research focuses on generating meaning and understanding through thick description and offers a beneficial approach to study problems requiring an understanding of complex social structures as well as the meaning people within those environments bring to their experience (Creswell & Poth, 2018). Case study allows for a deeper exploration of how life experiences personally influence an individual's assumptions (biases, actions, etc.) through insights shared along with analysis of collective individual experiences and perspectives in a way that exposes those assumptions to better understand what, how, where, and why they came to be (Adu, 2019; Creswell & Poth, 2018; Hancock & Algozzine, 2017; Yin, 2014). Qualitative research methods are grounded in intentional best practices and are accepted as a rigorous form of study allowing for deep descriptive insight, at a grassroots level, with the intention to shed light on a phenomenon as gleaned from the individual case and those living the experience (Creswell & Ploth, 2018).

Questions grounding this study were intentionally designed as "what" questions to move beyond quantifying a phenomenon to providing a discussion of a phenomenon to gain access to a shared space of meaningful conversation, a space that allowed for an experiential understanding about the individual IDer's narrative around their practices, experiences, and perceptions. Because of this intentional perspective on experiences and personal narrative, a quantitative methodology would not have been appropriate. Looking strictly at variables and quantifiable numbers would not have revealed the lived experiences and stories of IDers themselves, but instead would have focused more on the assets they created and been more closely aligned with a program evaluation study. Instead, a qualitative methodology was chosen to capture the experiences and perceptions of individuals responsible for creating the instruction and curriculum for workplace education and training.

A qualitative methodology was utilized as an appropriate lens to explore IDer perceptions. Quantitative methodologies, which focus more on quantifying data trends using variables and statistics is less effective when abstract interpretation of opinions, feelings, experiences are gleaned from participant data. Furthermore, to effectively describe IDers' application of knowledge about professional adult learning and theories related to ToL, qualitative methods are reasonable for exploratory case studies (Abu, 2019).

This study was designed to be exploratory, meaning data were yet to be uncovered. The use of case study is relevant when researcher intention is grounded in meaning making, from that which is covert or unknown, by using observation and inquiry

to explore a stated problem (Stake, 1995). Quantitative methods of research are more appropriate when there is an existing source of data from which to pool. considering existing data, quantitative research is an appropriate selection. Taylor et al. (2016) posited that if the research goal is to explore that which is not obviously tangible, a qualitative approach is a well aligned option.

The following research questions were used to ground this study:

1. What are the practices and experiences of IDers and their role in curriculum development for workplace education and training?
2. What are IDers' perceptions regarding adult learning theories in respect to ToL and intended outcomes?

The central concepts grounding the exploration of the research questions as defined by the purpose statement of this study are as follows:

1. IDer competencies and application of those competencies.
2. Curriculum development specifically focused on corporate learning and development.
3. Adult learning specific to professional growth.
4. ToL specific to professional adult learning and development.

Using a self-created interview protocol (IP), one-on-one interviews with IDers were conducted (see Appendix A). IP questions were used to ascertain data on IDer practices and perceptions and were created in alignment with known competency evaluative reports and executive summaries like the International Board of Standards for Training, Performance, Instruction (IBSTPI) 2012 report, and the Joint Committee on

Standards for Educational Evaluation protocol (Yarbrough et al., 2010) and UPCEA's survey study (n.d.).

Each participant engaged in one-on-one interviews, which provided a unique opportunity for the examination of workplace education and training curriculum design practices from specific points-of-view and experiences (Stake, 1995; Yin, 2018). Each recorded one-on-one interview lasted 45-minutes on average. Recordings were transcribed verbatim, analyzed, and coded by myself. Codes were analyzed and condensed into categories from which themes were identified.

IDer free access online portfolios were reviewed to glean light on RQ1 and RQ2. Portfolios were chosen based on the following word level criteria:

1. 3 or more years as a self-identified IDer
2. Professional philosophy statement included
3. Examples of ID assets reflective of professional experience included
4. Word level criteria focused on the following
    a. corporate training
    b. adult learning
5. Resumes were included, which provided information about IDer competencies and professional/educational experiences,

Collected data from the portfolios were analyzed for commonalities, patterns, and outliers based on defined codes using data analysis software (Quirkos). Additionally, interviewees had the opportunity to provide other sources of documentation, which might provide insights into curriculum development processes including aligned corporate

organizational goals with adult education initiatives. Items might include, but are not limited to, scope & sequence reports, Gantt charts (project management), competency lists, planning guides, and researcher field notes.

Role of the Researcher

Data for this study were rooted in participant narrative, the main role as researcher was that of a conversational elicitor around IP questions created to solicit participants sharing of their experiences and perceptions as IDers. Facilitating individual interviews and a focus group event required active listening, picking up on conversation ques to build on in the moment conversations for details and supported connections with interviewee perceptions and practices. A case study researcher has a curiosity and turns that curiosity into an exploration to graft a seedling of the unknown with that which has already matured into fully grown ideas (Stake, 1995). My personal experiences as an IDer and educational professional allowed for a first-hand understanding of the work of an IDer as well as provided access to several professional social networks where participants were sought as volunteers for this study.

Colleagues in the field of ID support the advocacy and importance of this study as well as the need to learn more about this topic. Field notes provided space to reflect on biases established through years of experiences as an IDer and helped make transparent biases through self-reflection. Exploring personal reactions to the conversations that ensued via participant interview and focus group discussions was also part of the researcher role as part of the exploration for understanding.

In this role, it was also important to establish the parameters of participant engagement and to make sure participant identities were not only protected, but they themselves were comfortable in sharing their narratives. Participants had full freedom to answer or not answer any question for any reason, expressed or unexpressed. However, aside from one one-on-one interviewee, who needed to exit the study for personal reasons, all participants chose to fully engage.

Methodology

Qualitative exploratory research is a complex social science involving real world and life phenomena from a focused perception (Yin, 2018). This form of research is appropriate when gaps exist in how a topic is understood or when seeking information about lived experiences and how individuals perceive and process those experiences (Adu, 2019; Merriam & Tisdell, 2016; Yin, 2018). Therefore, a qualitative exploratory case study methodology was used, which allowed for gaining a first-hand understanding of IDer perceptions and practices through their own discussion about their experiences in creating workplace education and training for professional adult learning. This method allowed for an analysis of data ascertained from authentic narratives to consider gaps seen in actual ToL initiatives for professional development and skills growth.

Since this study was designed to gain insight for understanding about IDer personal experiences in creating professional adult learning using adult learning theories to optimize ToL as well as exploring their personal narratives around their perceptions and competencies, this methodology was a good fit. In this section, an explanation about

the participant population, sampling method, and procedures as well as data analysis plans is reviewed.

Participant Selection

This study was grounded in the narratives of working IDers to gain insight and understanding about their perceptions and practices. Because of this, the sample size was intentionally kept small, which provided narrative-rich data in which to explore this phenomenon using deep description. Thirteen participants engaged in one-on-one interviews. These individuals had at least 1 year of experience designing workplace education and training assets and environments for adult competency training. Three different participants engaged in a focus group discussion to explore a collaborative discussion and perceptions of highly skilled professionals who currently teach or mentor other IDers.

The overall case included L&D departments and organizations who provide workplace education and training for professional adult learning and skills building. The second-tier sampling involved a subject-pool of IDers/training coordinators and L&D department leadership with the following criteria:

1. At least 3 years of experience in workplace or corporate settings and/or organizations who operate as consultants for workplace or corporate learning and development initiatives.
2. Are currently active in ID processes and in developing workplace training programs (remote and instructor led) and have produced, or are producing, at least three educational programs/projects within the last 3 years.

Purposeful sampling allowed for intentionality in the individual participant selection process from a sample using specific selection criteria, networking, and snowballing that promoted optimal gathering of information-rich data (Adu, 2019; Creswell & Creswell, 2018; Creswell & Poth, 2018; Merriam & Tisdell, 2016; Stake, 1995; Yin, 2018). The sample for this study was chosen from a pool of active members in professional networking social sites including Facebook, LinkedIn, and Twitter as well as researcher networking connections made from professional conferences specifically targeted for IDers, training coordinators, L&D managers/directors as well as IDer consultants hired for the development workplace education and training initiatives. To consider the need for saturation, which is a consideration when determining sample size, even though the sample size was low, responses demonstrated repetitions and redundancies among responses as well as the literature, which indicates a level of saturation has been met (Creswell & Creswell, 2018; Creswell & Poth, 2018; Merriam & Tisdell, 2016; Stake, 1995).

The industry of corporate L&D is inconsistent with job titles for individuals doing this type of work. Access to the field of those with the title of IDer is also widely varied in regards to competencies and curriculum development responsibilities. Because of these factors and convenience social-networking provided, participants were selected from an intentional pool of possible volunteers along with snowballing methods (Creswell & Creswell, 2018).

Instrumentation

Effective research questions are often revealed through the problem(s) on which the case study is focused and vary based on a researcher's status as an insider or outsider (Adu, 2019). Adu (2019) named four roles within a qualitative paradigm: gatekeepers, skeptics, critics, and explorers. I self-identify as a gatekeeper with decades of experience in ID. However, exploring these topics from a researcher's lens places me in an outside exploratory role and questions stem from both of those paradigm roles.

Interview questions were established based on the two research questions and were general enough to allow for interviewees to expand upon any given question, but not too general that the question was not effective in its alignment to tease out critical data to collect an aggregate data set, which allowed for an appropriate analysis (Adu, 2019; Stake, 1995).

One-on-One Interviews

Based on research questions for this study and reviews of literature as presented in Chapter 2, a researcher developed one-on-one IP (see Appendix A) was developed for the use and facilitation of participant one-on-one interviews. The one-on-one IP was structured as follows:

- Section 1: This section contributed to RQ1 and RQ2 and focused on educational background, certifications, and work experience. This section consisted of three questions.
- Section 2: This section contributed to RQ1 and focused on participants' practices and experiences as well as participant personal semantics when

discussing their perceptions on job processes and procedures as aligned with professional self-identification. This section consisted of nine questions and two sub-questions.

- Section 3: This section contributed to RQ2 and focused on participants' use of theories and best practices as related to curriculum development, adult learning/education and learning theories in general. This section consisted of five questions.
- Section 4: Aligns with RQ2 and ToL specifically asking participants to consider professional perceptions and self-actualization. This section consists of five questions.

Focus Group Interview

The focus group IP was developed in the same way as the IP and was used to facilitate an open conversation between three IDers. The purpose was to provide data for a word level exploration of language on aspects of professional IDers in a group dynamic (see Appendix D). The focus group IP engaged perceptions of practice as related to not only the individual but as discussed with fellow professional ID leaders as they unpacked their understandings about the ID profession and industry in general. The focus group IP was structured as follows:

- Section 1: This section contributed to RQ1 and focused on focus group participants categorization of ID competencies as well as defining industry expectations for what an ID does and identified as. This section consisted of two questions.

- Section 2: This section contributed to RQ2 and focused on focus group participants perceptions on the use of theories and best practices as related to curriculum development, adult learning/education and learning theories in general. This section consisted of four questions.
- Section 3: Aligns with RQ1 and RQ2 specifically asked the focus group to consider professional perceptions and the ToL of novice IDers and ways to support IDers. Focus group participants were asked to share advice along with their IDer philosophy statement as an activity, which was amended to accommodate a virtual space due to Covid-19 restrictions.

Procedures for Recruitment, Participation, and Data Collection

The sample for this study was selected from personal networking as well as from professional social networking sites, where two different IRB approved fliers were posted: one for one-on-one interviews and the other for focus group participants (see Appendix C and D, respectively). The first recruitment flier targeted IDers with no less than three years of experience for individual semi-structured interviews. The second recruitment flier was used to recruit volunteers to participate in a focus group of three to four IDers who held leadership roles and/or were responsible for the actual education of IDers as well as having over five years of experience.

Pure sampling was not necessarily appropriate for an exploratory case study seeking descriptive analysis (Yin, 2018). Instead, for this qualitative exploratory case study purposeful sampling was used to support the intentional selection of participants. Purposeful sampling was used to increase the chance that participants would be better

equipped to discuss and provide data grounded in lived experiences from individuals active in their profession (Creswell & Poth, 2018). Intentionality was foundational in choosing individual samples who provided a rich description of their personal and professional experiences and was the primary source of data to answer both research questions (Creswell & Poth, 2018).

As stated, individuals were recruited via professional avenues on social media networks including LinkedIn and professional communities of practice as well as colleagues within the field of ID. Each participant was sent an email with all pertinent consent forms and asked to respond with "I consent" in a responding email. Upon receiving the consenting email response, individual interviews were scheduled using an online communication platform.

At the start of each interview, participants were asked for approval to record the session and reminded they were under no obligation to answer, or engage in, any question or line of conversation and were under no obligation to explain their reasoning. The appropriate IP was then used to engage open-ended questions leading to discussions that allowed participants to share their narrative in direct response to questions as well as expanding on impromptu sub questions supporting the data collection purpose for using semi structured interviewing methods. For this study, participants were also asked to self-identify their level of confidence as IDers as well as describe how they came into their profession and professional identities.

Recorded data were then transcribed via the online communication software's transcription feature. Transcripts were then downloaded and reviewed along with audio to

correct any discrepancies in software translation. These transcribed documents were then read and reviewed for analysis and documentation of coding categories that emerged. Interview data (notes, recordings, transcriptions) and focus group data (notes, recordings, transcription) were uploaded to a secure, password protected Microsoft OneNote notebook as well as a password protected flash drive. Each of the interview sessions were transcribed using either the software included in GoToMeeting or via audio to text software included as computer resources.

Data Analysis Plan

Analysis of collected data focused on identifying specific categories and patterns through coding using holistic methods (Creswell & Poth, 2018; Saldana, 2016). Analysis of interview transcripts was holistic. Both one-on-one interview data and focus group data provided rich description on the entirety of the case study as a single study versus taking an embedded analysis approach, which considers each participant case as its own unit (Creswell & Poth, 2018). Analysis of collected data focused on identifying specific categories and patterns from the whole of all data collected to develop a coding using holistic methods (Creswell & Poth, 2018; Saldana, 2016). Each participant narrative was analyzed individually as well as a collective in search of word-level patterns a to illicit common ideas, understandings, and experience through language. As a researcher forced to engage online interviewing processes due to the global pandemic, observation was done in the form of being an active participant in the semi-structured interviews as well as taking diligent notes to support the process of classifying and interpreting data for meaning making (Flick, 2014). Qualitative research that engages narrative analysis values

observed hunches and insights through implicit and explicit means as a measure of rigor in the analysis process and meaning making (Merriam & Tisdell, 2016).

In addition to interviews, a secondary resource of data was collected from online resources such as Job Banks (LinkedIn and Indeed) and online portfolio public spaces (PortfolioGen). This supported RQ1 as well as understanding professional practices required of IDers as well as the role they are expected to fulfill in the workplace. It also revealed areas of divergence and inconsistencies. Portfolios provided access to other data including professional philosophies, work samples, resumes, and memberships to other professional organizations.

Categorizing data that is the product of researcher interpretation is beholden to consistency in the process for analysis (Stake, 1995). Using a combined system of analysis adapted from Creswell and Poth's (2018) spiral process and Braun and Clarke's (2022) phases of analysis, while data was being collected analysis began to become familiar with the global semantics. Once all data was collected, transcribed, and reviewed global categorical codes were established at the onset of analysis to begin the deeper dig for patterns; categories, codes, and themes. Final assertions were reported using rich descriptive writing to support validation and naturalistic generalization (Stake, 1995).

Trustworthiness

Historically, qualitative research has been criticized as lacking the same statistical generalizability and validity indicative of quantitative and experimental research studies (Creswell & Creswell, 2018; Creswell & Poth, 2018; Stake, 1995; Yin, 2018). Over the years, researchers have established a variety of measures to ensure rigor in how

qualitative data is measured and interpreted as well as identified best practices for the design, including coding and reporting, of qualitative research (Stake, 1995). Ensuring trustworthiness is an important aspect of qualitative research and is accomplished through establishing credibility, transferability, dependability, confirmability, and reliability of the researchers design a study.

Though the incorporation of rich description of collected and analyzed and data, from a variety of perspectives, validity of interpretation can be established (Creswell & Creswell, 2018; Creswell & Poth, 2018; Stake, 1995; Yin, 2018). Interviews were conducted using an open-ended method as well as leaving open the opportunity for follow-up interviews to confirm analysis observations of data collected and/or to expand on provided responses, if needed. This helped to establish elements of triangulation (Merriam & Tisdell, 2016; Stake 1995).

Ethical Procedures

Great consideration was made regarding ethical procedures including approval from the Walden University Institutional Review Board (IRB) for all resources used to engage participants. Prior to seeking IRB approval, successful completion of IRB ethical training modules was completed as required. All guidelines in support of confidentiality and participant protections were followed. This study presents minimal risk to volunteer participants. Each participant acknowledged their consent, after reading the appropriate consent document (interviews/focus group), via email (see Appendix A and B, respectively). Each of the consent forms as well as recruitment fliers provided a thorough description of the study and how participant contribution will inform industry practices.

Expectations and time commitments were outlined as was their right to withdraw from the study. The interview was the mark of the end of participation and each participant was afforded the opportunity to ask any final questions, provide additional narrative, or inquire about the study in general.

Participants were assigned pseudonyms based on a numbers code to provide anonymity. All personal identification information has been kept secure in a locked file cabinet. Data will be kept for seven years, at which time participants will be notified (based on provided contact information) prior to and upon any potential destruction of pertinent data. Internal approval was established for researcher permission to engage data collection at place of employment.

Agreed upon, interview and focus group locations were established based on participant comfort levels. Originally, locations were to be public and included public library study rooms, university study rooms, and other such public spaces. Due to the Covid-19 global pandemic, public meeting spaces were closed and social distancing was mandated requiring an adjustment to participant encounters (James, 2020; Yong, 2020). All interviews were moved to an online communication platform and/or conducted using communication devices.

Summary

The goal of this chapter was to provide an outline of the research method used to explore and answer RQ1 and RQ2 for this study including justification for the use of qualitative exploratory cases study. Provided was information pertaining to data collection procedures, participant, and sampling selection processes, instrumentation, and

data collection, including a discussion on trustworthiness and ethical strategies to ensure the well-being of participants and protections of their identity.

Chapter 4: Results

A qualitative, exploratory case study provides a way to explore the human experience and supported the stated purpose of this study. A generic qualitative case study methodology was utilized (Kostere & Kostere, 2022) to explore the perceptions and experiences of IDers in relation to their responses to the following research questions:

RQ1: How do IDers support adult learning competencies in the workplace education and training contexts they design?

RQ2: How do IDers describe how they support adult learners' acquisition and transfer of material during workplace education and training?

These research questions were developed to frame data collection guidelines around the practices and perceptions of IDers. In addition, I wanted to learn through individual IDer experiences with adult learning theories to promote ToL.

This chapter first describes the setting, specifically focusing on conditions that influenced participant engagement. Next, it provides a discussion on data collection, including any deviations from what was presenting in Chapter 3. Coding processes will be presented along with established themes. These themes are discussed in relation to research questions and supported with participant quotations and field notes. Also discussed is trustworthiness in support of credibility, transferability, dependability, and confirmability.

The framework of ToL was used to inform these results. Interview questions were based on the constructs from the framework and were used to inform the analysis of these results.

Setting

At the onset of beginning the interviewing process, the world experienced a global crisis with the invasion of COVID-19. Social and working spaces were immediately required to shut down (Yong, 2020, p. 1). As public gathering spaces became prohibited, including educational and corporate brick-and-mortar locations, face-to-face interactions had to conducted via remote modalities. Not only were social gathers prohibited through state mandates, so too were learning spaces including those for corporate professional growth. Everything considered non-essential was no longer viable face-to-face.

With the onset of mandated quarantine measures, corporate training programs and initiatives were forced to adjust as thousands of employees shifted from working in an office to working remotely. Corporations were closed to non-essential workers and meeting places were closed. Face-to-face training required transformation to online platforms (synchronous and asynchronous). This created an immediate change in processes and goals for IDers, e-developers, and adult learners.

In response to COVID-19 restrictions corporate training initiatives were quickly force to remote learning, and a push for quick turn arounds in eLearning programs in lieu of face-to-face, brick-and-mortar learning modalities. In doing so, this sense of urgency shifted the focus from learner-centricity to product development for eLearning processes and a quick remedy for cancelled face-to-face training (Kshirsagar et al., 2020; Mikolajczyk, 2022; Moore et al., 2022). During the 2020 pandemic, workplace education and training was reported to have increased at a 12 percent increase creating a 92.3-

billion-dollar price point in 2020-2021 (Freifeld, 2021). Focus Group Participant 2 shared their concern that the rush to get training in a mode where it can be accessed remotely could have a negative impact because "many people mistakenly think that the response to the pandemic is what online learning is similar to accepting a first draft as a cohesive final draft."

Overall, participants were eager to talk and share their insights in response to the research questions presented. Participant numbers were affected by the pandemic. During scheduling for interviews, one volunteer needed to exit the study due to a family COVID-19 emergency. Of the remaining 15, three participated in the focus group and the other 12 engaged in one-on-one interviews.

Participant Profiles

Participant requirement began by creating two fliers to solicit a pool of volunteers from which to choose participants for one-on-one interviews and the focus group. These fliers were placed on various professional social media sites for networking amongst IDers, e-developers, and training coordinators (see Appendix C and D). Criteria for one-on-one interviewees included needing to have at least three years of experience designing adult learning for workplace education and training and/or had produced three or more educational program/projects. Focus group participants needed to have 5 years of experience designing adult learning for workplace education and training along with additional leadership/management roles.

In total, 16 participants were recruited, 13 one-on-one interviews and three focus group participants. Due to the pandemic, a one-on-one participant opted out, leaving 12

one-on-one interviews. Ten of the one-on-one interviews were conducted using an online meeting platform, and two were conducted via cell-phone. The focus group discussion was conducted in an online meeting platform. All interviews and discussions were recorded and transcribed using audio-to-text software and my review and clarification with field notes. Initial requirement communications and scheduling management were established via email.

One-on-One Interviews

Table 1 below provides demographic data for one-on-one participants including a breakdown of how each expressed their experiences in education as well as how they came into the profession of ID.

Table 1

Relevant One-on-One Participant Demographics and Characteristics

Pseudonym	ID Experience at Time of Interview	Formal Teaching Experience at Time of Interview	Current Job Title	Formal Education
Group A: Background experience was from outside of a traditional teaching dynamic and focused more on technology and authoring tools and how content was logistically delivered as a learning product.				
Participant 7	32yrs	0yrs	Media production specialist	BA: Communications/Public relations film and video
Participant 11	17yrs	0yrs	Sr. learning & development specialist	AA: General Studies
Participant 2	16yrs	0yrs	IDer	BA Computer Science AA: Multi-Media
Participant 3	13yrs	0yrs	Training coordinator	AA: Motion Picture Direction

				AA: Motion Picture Production
Participant 10	12yrs	0yrs	Sr. learning experience designer	Doctoral Candidate MA: Workforce Development MA: Learning Technologies BA: Journalism
Participant 8	10yrs	0yrs	VP of product management	BA in progress AA
Group B: Background experience in traditional educational dynamics and responded to interview questions from a pedagogical perspective and who the learning material was intended to serve (learner-centric)				
Participant 5	27yrs	27yrs	CEO/founder	MA: Education
Participant 13	23yrs	2yrs	Director	M.Ed.: Education
Participant 6	17yrs	6yrs	Owner of LLC	MA: Educational Technology
Participant 12	7yrs	4	Assistant director	PhD: Curriculum & Instruction Ed Tech MA: Media Studies BA: Fine Arts
Participant 4	3yrs	25	Sr. IDer	BA: Education
Participant 1	2yrs	8	Sr. learning & performance Specialist	MS: Ed Tech BS: Business
Participant 8	10yrs	0yrs	VP of product management	BA in progress AA

Focus Group Interviews

Table 2 below provides demographic data for the three participants engaged in the focus group discussion. These individuals were selected as experts in their field as well as mentorship. Their experiences and years in the ID industry were required to be over 10 years in an ID leadership positions including ID skills education, research, and mentorship.

Table 2

Relevant Focus Group Participant Demographics and Characteristics

Focus Group Participants (FGP): All had extensive educational and ID experience				
FGP1	MA Organizational Management BS: Economics BS: Psychology	Chief strategy officer	10+	ID Background
FGP2	MEd Instructional Technology BA: English/Education	Lead IDer & course manager, safety, compliance, & training	27+	Educational background
FGP3	Ph.D.: Educational Leadership and Administration Post MA: Higher Education MA: Training and Development BA: Sociology	Manager of support services- e-learning & instruction support	13	Educational background

As can be seen in Table 2, collectively, these participants have over 5 decades of experience as experts in the field of ID as well as serving as IDer mentors and instructors. They have brought to the focus group discussion table knowledge of important competencies related to the ID field in general and important ToL considerations for IDers. FGP2 and FGP3 both self-identified as having a professional educational background as university instructors and/or classroom educators in a K-12 setting. Both have experience as leaders within their organizations as well as the ID research and training industry. FGP1 self-identified more closely as having experience focused on adult learning and workplace professional development strategies using eLearning development technology. FGP1 was also an active leader in current ID networking spaces providing ID learning opportunities.

Data Collection

Creswell and Poth (2018) suggested an analysis spiral approach to harness what was a considerably complex and unique process not always easily made transparent when conducting a qualitative research study. The spiral approach for collecting, analyzing, and reporting data are discussed in the following pages.

Spiral Approach Step 1: Collecting the Data

Raw data were collected in the form of transcribed interviews for 12 one-on-one interviews and one focus group discussion consisting of three participants and myself. Participants were invited to share ID documentation in support of their processes, experiences, and narrative. No participants directly shared additional documentation. However, specifics were discussed in answer to one-on-one IP (see Appendix A) question Section 2: Use of Curriculum development, Adult learning/education & Learning Theories as well as focus group IP (see Appendix B) Section 3: Use of Curriculum Development, Adult learning/education & Learning Theories.

In addition, secondary data were collected from online ID job search resources including LinkedIn and Indeed using key terms instructional designer, instructional design, workplace IDer, and workplace instructional design. An online Google search for IDer portfolios was also conducted and resulted in 20 online ID professional public portfolios found using the terms IDer, IDer philosophy statement, IDer workplace training, IDer resume.

Spiral Approach Step 2: Managing and Organization of Collected Data

Participant experiences were coded and broken down into relevant categories using tracked-changes to track analysis and preliminary categories along with participant quotes. Fieldnotes that were taken during the interview and focus group encounters were also organized and aligned with appropriate tracked-changes for coding and assigning to categories. Secondary data (portfolios, job descriptions) were also analyzed as collected using a similar process of determining word level commonalities to establish new categories; aligning it with established categories; or setting it aside for future implications.

Spiral Approach Step 3: Reading and Memoing Collected Data

Reading and re-reading transcripts was conducted using interpretation-focused coding (Adu, 2019) to determine explicit and implicit empirical indicators, all of which was part of an ongoing, iterative process as raw data were gathered. Transcripts were reviewed alongside audio for accuracy editing and the onset of word level categorizing via tracked-changes comments and notes in Microsoft Word.

Spiral Approach Step 4: Describing and Classifying Codes Into Themes

As interviews were conducted and data collected, ongoing code classification and thematic patterns were continually analyzed along with code editing. This was difficult, as the stories and experiences of each participant were not only important but interesting. However, the wealth of data that emerged was substantial requiring focused mining using a precise lens and presented in rich descriptive language.

Spiral Approach Step 5: Developing and Assessment of Interpretations

As part of the analysis process, Step 5 was beneficial in solidifying the way in which interpretations of the data were verifiable. Creswell and Poth (2018) suggested this was the step to help solidify the "how do I know what I know or think I know?" aspect to qualitative research methods (p. 264). To do this, I engaged in conversations with my chair, to discuss final themes and review of my interpretations. Often, peer review is part of this process. However, one limitation to this study was a lack of cohesive peer community in with which to engage.

Spiral Approach Step 6: Representing and Visualizing the Data

Visual representation was most critical to help reveal how experiences were organically grouping the one-on-one participants into two divergent groups. Visual representations are included in this document.

Spiral Approach Step 7: Account of Findings

Primary data included interviewee responses from one-on-one sessions as well as a focus group discussion. Reading and reviewing collected data was ongoing and highly iterative throughout the entire collection process. As data came in, they were read and summarized before being preliminarily color coded based on emerging commonalities. These codes were then whittled down into categories and ultimately themes based on analysis interpretation and relevancy to research questions, which will be discussed later.

Data Analysis

A reflexive thematic analysis process was used to develop codes, categories, and themes from data collected for this study. Research questions focused the data analysis on

IDer perceptions of and practices for creating professional training for adult learners with a focus on ToL outcomes. The analysis process was iterative as well as reflexive and required multiple reads of the data as the broad focus was narrowed down to specific researcher observations, deductions, and patterns. Coding was inductive, which allowed for an open exploration of themes without predetermined priori (Boyatkis, 1998; Braun & Clark, 2006).

Manual coding for both one-on-one interviews and focus group discussion involved what could have been likened to an archeological dig searching for a trail that would help define the ID experience. Instead of brushes and sifting pans, my tools included highlighters to support marking out the territory via color coding and detailed field notes. Field notes helped hone in on and keep track of my own understandings and biases as relating to my own experiences as an IDer as well as what trends were evolving through participant experiences and semantics. The manual coding process was ethnographic in nature and allowed for first hand connections with individual participants as well as active observation of the shared narrative between focus group participants.

The rationale for engaging both interview and focus group qualitative methods was to gain insight on the individual ID experiences in tandem with a small group of ID leaders. The majority (scheduling permitting) of one-on-one interviews were conducted prior to the focus group. Since active analysis was conducted throughout the entire data collection process, this was decided to help inform the focus group discussion. Braun and Clark (2022) developed a six-phase process for thematic analysis, which supported a clearer understanding for organization of data.

Phase 1: Dataset familiarization

Recorded interviews, for both one-on-one interviews and focus group discussion, were automatically transcribed via the social network platform, and then cut and pasted into a word document in their entirety (no language was changed at this phase). However, software word recognition was inconsistent, requiring diligent manual alignment with audio and written transcriptions for accuracy.

Using Microsoft Word and tracked changes feature, edits to clarify audio in the transcription were made. This required multiple replaying of each recording for transcription review. While, a painstakingly long process, it allowed for a deep experience with each participant response to interview questions. Doing this allowed for an initial manual coding of text to immerse myself in the narratives individually and then more collectively as more of the interviews were completed over the course of several months. Researcher notation including attention to participant inflections, words, and intonations as well as noting my personal bias typically in the form of questions to reflect on.

Phase 2: Coding

Open coding provided an opportunity to generate ideas and insight without preconceived hypothesis about categories or themes as each transcript was read and reread to organize data generically (Braun & Clark, 2022; Taylor et al., 2016). I was able to approach the data in an exploratory space and to *hear* participant perspectives with an open, inquisitive mindset, which also afforded more openness to modify codes throughout the phases of code generation. Two separate IPs (see Appendices A & B) were

created, one for 12 one-on-one interviews and one for the focus group comprised of three individuals. Tables 3 and 4 (below) show one-on-one and focus group IP topics and how many questions were assigned to each.

Tables 3 and 4 define the focus of the four sections of the one-on-one IP and the focus group IP. These headings were designed in alignment with research questions, which were developed to initiate conversation around the practices and perceptions of IDers in the case of the one-on-one and in the case of the focus group IP how seasoned IDers engage their perceptions in understanding the ID industry and practices.

Tables were created to organize each one-on-one participant responses and focus group discussion transcript to align each IP question with both RQ1 and RQ2. Field notes were kept in a OneNote file as well as comments within the transcript document (sticky notes/Microsoft Word review comments). All notes were color coded to help hone in on patterns as related to the overarching research questions.

Table 3

One-on-One IP

Section	**Topic**	**Number of Interview Questions**
Section 1	Demographic Information	5
Section 2	Practices and Experiences	10
Section 3	Use of Curriculum Development Adult Learning/Education Learning Theories	5
Section 4	Professional Perceptions and Self-Actualization	4

Table 3 shows, 34 questions (see Appendix A) were asked of one-on-on IDers. Question prompts were open ended and provided participants the opportunity to discuss their

practices, skills, and perceptions regarding how they design workplace education and training assets in support of adult learning competencies. Individuals were also asked to consider their confidence levels, professional philosophies on ID, and to explain what they understand to be important competencies for IDers in general.

Table 4

Focus Group IP

Section	Topic	Number of Interview Questions
Section 1	Demographic Information	5
Section 2	Practices and Experiences	10
Section 3	Use of Curriculum Development Adult Learning/Education Learning Theories	5
Section 4	Professional Perceptions and Self-Actualization	4

Focus group questions also included 34 questions (see Appendix B) Only slight variances were included in this IP to consider focus group participants and their extensive experiences as mentors and leaders in the field. However, their experiences were more representative of IDers with research and/or mentoring experiences they engage for the promotion of other IDer skill building. Participants in the focus group were also asked to consider their personal perceptions of their own skills as well as the ID industry and current trends.

Reflexive thematic analysis process was used for coding 273 pages of transcribed text from both one-on-one interviews and focus group discussion transcription. data relating to each of the research questions and purpose of the study. A table of participant

and focus group coded quotes was created. Proceeding coding steps included recoding codes looking for patterns and common themes between and amongst all data. This process was in keeping with thematic analysis processes. A total of 208 codes from interviews and focus group transcripts were initially generated with seventy-three categories and included in a coding memo book of which an example was included in this document (see Appendix E) in need of deeper recoding and analysis to reach a reasonable thematic understanding of the data.

Phase 3: Generating initial themes

Two themes surfaced from data analysis.

1. Divergences in expectations of IDer competencies who are tasked with creating workplace education and training for adult learners.
2. Misalignment in organizations goals for workforce and IDer pedagogical acumen preparedness for the intentional design of workplace curriculum to promote ToL.

To reveal these two themes, seventy-three were extrapolated and placed into categories (see Appendix E) and then recategorized, multiple times, using Quirkos™. This process was performed to analyze data from a macro collection of experiences down to a micro level of overlapping experiences shared by interviewees and focus group discussants. Using my own field notes and continued observation notes within the software, I was able to reflect on my own biases, understandings, and take-a-ways all the while dwindling down to the solidified and focused themes stemming from this study as aligned with posed research questions. This allowed me to hone in on repetitive and

collaborative language, ideas, processes, experiences, perceptions, and challenges. Table 4 below lists the two themes cultivated form this study, each are discussed later.

Phase 4 & 5&6: Developing and reviewing themes/ Refining, defining, naming, and reporting themes

Once themes were established, and the editing process was well underway, organization of themes and representation of data went through multiple drafts to best present the narrative that emerged as the focus of my interpretations and analysis. As stated in chapter 1, RQ1 and 2 were developed to better understand of how IDers perceive and describe their practices and experiences in support workplace education and training for adult learning competencies. These research questions were posed out of an interest to learn through individual IDer experiences with adult learning theories to promote ToL.

With that in mind, the chosen categories for the IP were to probe into ID background experiences and how they discussed professional identities within the context of their workplace dynamic and understanding of their role in that dynamic and the impact all of this has on their professional identities. IP categories also provided a framework in which to focus discussions around workplace education and training assets and the IDers use of adult learning/education methodologies and learning theories in general.

Results

Divergences in becoming an IDer means that for many of the participants, they described their role, tasks, and responsibilities quite differently. The divergence centered

around how one-on-one interview participants were self-identifying and in relation to like experiences and narratives.

One-on-One Interviews

Group A

Group A consisted of five one-on-one interviewees Common in this group's semantics and what they chose to include in answer to interview questions was how participants stated entering the ID profession as being unintentional and through other avenues such as media specialists, training coordinators, and computer software positions. These participants discussed how they metaphorically fell into ID due to situations including job availability, career changes, leaving the teaching profession for better job opportunity. ID was a way to bridge educative competencies in more traditional brick-and-mortar settings to those growing from eLearning initiatives and workplace education and training initiatives. An example of this unintentional ID professional journey, Participant 10 went to school for journalism and talked about coming into their career accidentally, ending up working in telemarketing as phone support but stated "training was part of the job [and I] saw a need for better training materials." Another shared narrative was from Participant 3, a former videographer for a small educational tech firm. Participant 3's employer decided the eliminate the position of videographer, but offered Participant 3 the opportunity to learn new eLearning authoring software and as Participant 3 shared, "software that nobody was using and asked [me] to give it a try, so they could keep me on staff. I said yes and that's kind of where I got my start."

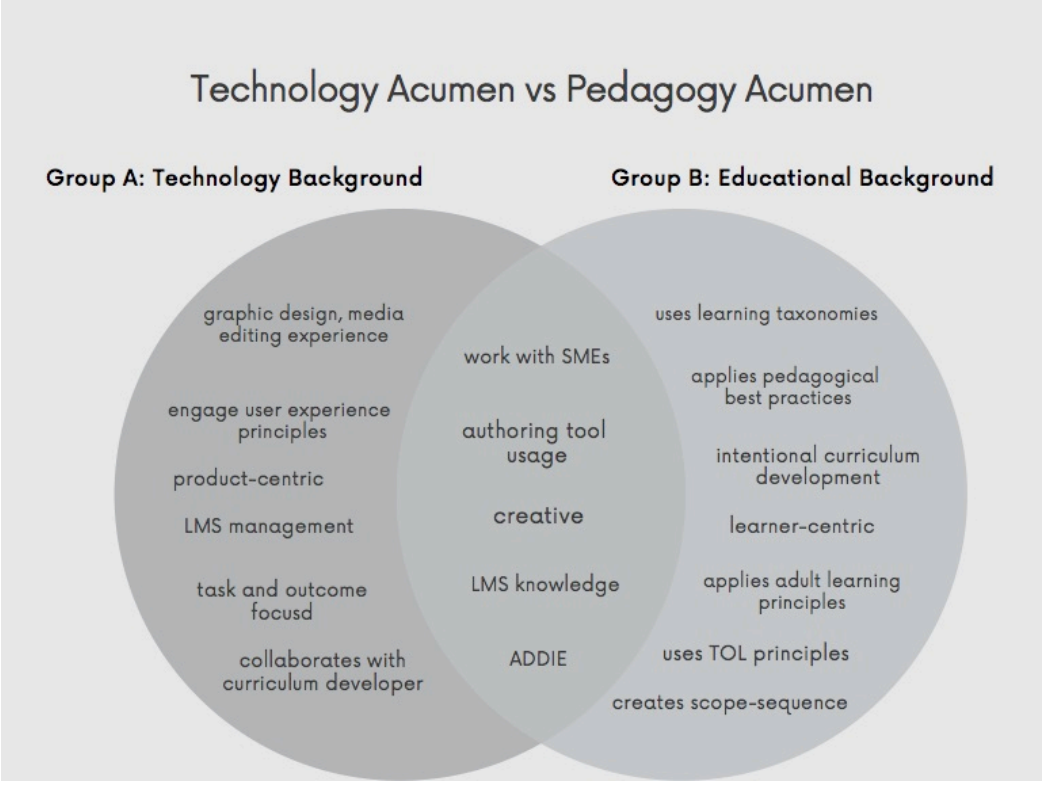
Group B

Group B, included seven out of 12 participants considered themselves to be designers of learning experiences with professional identities grounded in pedagogical acumen. Participants in group B began their careers as educators and held degrees in various educational contexts. Participants in this group, viewed content as needing to be developed into a curriculum in support of a learner need or gap in skills. These participants often used collected local workplace education and training data to inform their workplace learner needs, which was typically aligned with a workplace goal, purpose, and/or expected outcome.

Figure 2 below shows differences in how Group A and B one-on-one interviewees framed their perceptions in relation to IIP RQ1 and RQ2.

Figure 2

Group A: Technology Focused Background vs. Group B: Pedagogical Background



As can be seen in Figure 2, divergences were evident between IDers whose experiences aligned with a technology acumen and their use of eLearning authoring tools for the development of assets in support of workplace education and training versus those whose experiences aligned with pedagogical acumen and the use of educative methodologies and process to design curricula in support of workplace education and training.

In the center of the graphic organizer, both Group A and B discussed their working with subject matter experts (SMEs); using authoring tools for eLearning platforms; the importance of creativity; having knowledge about learning management

systems (LMS); and understanding as well as use of the ADDIE, a decades old method for training development and stands for Analysis-Design-Develop-Implement-Evaluate.

However, divergences are evident in areas concerning how the similarities are enacted on. For example, Group A tends to rely more on their background in graphic design and media editing experience and Group B rely more on their ability to apply pedagogical best practices, use of learning taxonomies, and application of curriculum development processes. These specific divergences lend reason to the two group's divergence in what they put as the impetus of learning: Group A was product-centric, meaning the learning deliverable itself as to Group A's learner-centric focus. Both are important and makes sense since ADDIE was a shared system in use. And, as pointed out ADDIE includes specific processes for content and product with the implication that it was only relevant when a learner need was present.

Group A and Group B also diverge in how they talked about the act of creating learning material and a learner's access to learning. While both groups valued an understanding of an LMS, only Group A also stated the importance of being able to manage the technical components of an LMS. Group A discussed their roles as more of a collaborative role in their ability to perform specific tasks for learning outcomes using software tools in response to a curriculum driven intervention as defined by someone else. Group B discussed their role in terms more aligned with planning and application of principles, theories, and best practices for the ToL as determined by a learner need in which an intervention was then designed.

This was not to suggest there was a hierarchy in importance, as both groups also shared ideologies for the promotion of best practices in outcomes for workplace education and training. Participants in both groups acknowledged the value in both sets of competencies. In fact, I would posit that this divergence is again stated, implied, and accounted for in the well-known and highly used ADDIE system. It can be surmised that if there is value in both, intentional understanding how to facilitate the skills of both into the design and development for workplace education and training assets is equally important and deserving of intentional application. Intentionality promotes processes that are indicative of best practices allowing for higher ToL probability.

Theme 1: Divergences in Purpose for Workplace Education and Training Assets and Learning Goal Centricity (LGC)

Learning Goal Centricity (LGC) refers to who or what need was discussed as the catalyst for any given learning material. In other words, LGC requires an IDer to ask or to know what purpose the material serves and for whom. The purpose of a learning initiative was the incentive for how and for what assets will be created, all of which implicate the intentionality for learning material production. The results of this study revealed two LGC categories.

One-on-One Interviews

Group A

The role of the ID was to take provided content and/or specific storyboarding (schematic of a learning asset) as provided by a SME and create a visual and/or actionable representation of that asset. This perception of the ID role was focused on the

product of the learning material and user experience. For example, one of the five Group A participants, Participant 8, found their job by answering an employment advertisement for a Content Assembler, which defined an IDer as being "responsible for overseeing, and making sure processes were done in an attractive manner."

Defining ID tasks as being focused on appearances and the mechanics and use of software was a common job requirement regarding ID competencies for those grounded in a tech-centric approach to their ID identity and process. This was not without the inclusion of the learner, or more succinctly, the learning outcome. However, the tools defined how a learner would be presented content versus how they would consume learning for a specific purpose. For example,

Group B

Group B participants discussed their experiences through a clear learner-centric considered perspective. As previously discussed, learner-centric curriculum design practices and theories put an emphasis on assessing learners' needs as the catalyst for intentional learning interventions and in turn the design of the learning deliverables all of which are aligned with learner outcome expectations (Botma et al., 2015; Cullen et al., 2012; Knowles, 1980; Merriam & Bierema, 2014; Pavlova & Sanger, 2015; Zepeda et al., 2014). Group B's learner-centric approaches were grounded in specific pedagogical practices and research. Because of this pattern as extrapolated from transcribed data, it was evident that Group B enacted their ID tasks from the point of view that software serves as a tool for the learner access to content in support of a defined learner need.

This learner-centric outcome approach was foundational for all participants landing in this group with pedagogical experiences. One example of this perspective can be understood through the words of Participant 12, one of the seven in this group. Participant 12, described coming to their position with a wealth of expertise in ID and ID competencies, and shared what they considered to be a critical competency for IDers being "the ability to build and create long lasting relationships with people…Content experts are important but if you don't understand the learner, things can be misaligned."

The grounding experience in this group centered around how they brought up the purpose of learning as being a critical factor. Being able to identify the *who has the need/where is the gap* question should ground the purpose of any developed learning material. Participant 10 said, "I think purpose is really big. But, I also think another on is being learner-centric. At the end of the day, I care about the student experience."

From this group, it was clear their experiences stemmed from the belief that without knowing who the learner was and the learning need, ToL was jeopardized as the focus becomes engaged on product and a *to do list* to be checked off that provided information to be addressed without considering who will consume the information and process it in some way that nourishes a need for an obtainable outcome. Participant 5 provided a succinct way to consider juxtapositions of LGC and stated that "instructional design in and of itself is useless if there isn't a user. And if the product itself doesn't motivate the user… I'm a strong believer in true, effective learning only happens through relationships, both with people and with content."

Focus Group Interviews

Focus group participants discussed the value of an IDer having skill sets in both technologies, specifically the use of elearning authoring software utilized for the creation of learning assets and learning management systems as well as pedagogical acumen, specifically in curriculum development, theories on ToL, adult learning, and ID methodologies. During the focus group discussion all participants expressed the importance of collaborative skill sets, but emphasized the need an understanding of pedagogical acumen for learning transferability in workplace education and training.

Exploring ToL through a theoretical and experiential lens of ID professionals has the potential to better identify the role of ID theories and methods and what an IDer needs in skills, competencies, and credentials to support a positive impact on workplace education and training. Professional ID leaders, like those participating in the focus group discussion, consistently pointed to assumptions about what an IDer should bring to the table as well as what tasks they should perform as being problematic. Focus group participants agreed that these assumptions were mostly due to the lack in understanding about accepted competencies an IDer should have and how competencies were acquired. This compiled with workplace HR hiring practices for positions within a workplace education and training department put a larger focus on product development, meaning learning material production over pedagogical considerations and an effective curriculum in support of learner need. Perhaps, this duplexity is not an either/or situation. Instead, intentional identification as to the balance between LGC and competencies necessary for

each step of the process in creating assets in relation to a learner need should be the focus of more research.

Focus group participants were unanimous in expressing that much was unknown about ID competencies and little research has been conducted. One focus group participant has conducted their own collaborative survey research into the competencies of IDers. More studies are necessary to better understand the processes for the creation of professional adult workplace education and training assets and who, or what, constitutes necessary conditions as the core catalyst for effective ToL. Thereby the ability to better identify necessary competencies of and for ID methods and IDer approaches to the design and development of workplace education and training.

In summary, an important consideration when looking at this conversation through the lenses of these two groups was to see these as divergent perceptions as being equally important to workplace education and training. The divergence calls to the surface the need for an understanding about intentionality and use of competencies for the role of ID and the professionalization of the industry expected to carry out these roles and initiatives. Participant 11 shared their belief that "we have to think differently about the way we design learning opportunities, and seek to mirror, or seek to bridge the gap between how we learn at home and how we learn at work…by doing that, we will create more effective, long lasting learning experiences."

Theme 2: Misalignment with Job Titles and ID Function

One-on-One Interviews

When asked interview questions that were focused on RQ2 and challenges IDers encountered in their daily tasks and responsibilities, IDer narratives centered on an apparent misalignment between how IDers function in relation to organization defined job titles and ID industry competency norms. This was specifically talked about as a frustration when sharing experiences involved in expectations and choices being made for the creation of workplace education and training assets.

Misalignment centered around application of competencies in response to how learning assets were delegated and by whom. At the core of this misalignment, being challenged was the professionalization of the ID role in general. Participants from Group A and B had slightly differing perceptions in how they dealt with the misalignment. But, both groups highlighted the misalignment equally.

Group A

Participant 10 compared their ID working relationship with leadership to be like Batman's Alfred where an IDer should be Batman in the driver's seat. An IDer is more than an assistant to SMEs and content managers. The IDer becomes an expert assistant in response to what leadership deems critical. Instead, the IDer would be better served as Commissioner identifying areas of high need in collaboration with leadership. One could also use this analogy to consider the IDer as Batman and having the role of expert vigilante, responsible for the design and implementation of interventions for the good of those in their care, the learner in this case.

Group B

Focus Group Interviews

All three focus group participants expressed concerns for the need to professionalize the industry of ID stating that the varied and undefined competencies create inconsistencies impacting best practices in designing learning for adult workplace curricula. Furthermore, the focus group rigorously discussed the importance of understanding the different competencies from the lens of design and development, meaning content creation and use of technical resources for learning material creation.

Evidence of Trustworthiness

Trustworthiness is grounded in the ability to address the credibility, transferability, dependability, and confirmability of the researcher and processes. As discussed in Chapter 3, credibility, transferability, dependability, and confirmability are required to promote research generalizability. Using multiple validity procedures including triangulating data sources (interview, document analysis) with participants in two different settings (corporate and private consulting), I worked to establish consistency and cohesiveness; validity and transferability of potential findings (Creswell & Creswell, 2018; Creswell & Poth, 2018; Yin, 2018) and viable trustworthiness.

Additional validity strategies included member checking to help confirm dependability of data interpretations and findings (Creswell & Creswell, 2018; Stake, 1995). This was done by restating responses to ensure understanding and to allow for clarifications and the establishment of rectified responses. To address issues of reliability, transcripts of interview recordings were checked for accuracy and reviewed multiple

times. As an established IDer, researcher bias was checked through narrative and self-reflection along with participant narratives (Creswell & Creswell, 2018).

Researcher Bias Considerations

During analysis of data, close attention was given to routine checks on researcher judgment, especially since data collection was iterative in nature. Adu (2019) recommends qualitative researchers suspend their judgment during data analysis, what is referred to as epochè. To this point, field notes were important in supporting interpretations of data analysis to keep in check personal bias and judgment as an expert in the field of ID.

Summary

In summary, all participants from one-on-one interviews and focus group, highlighted the value and importance for the inclusion of a trained IDer in determining when and what type of training constituted an appropriate intervention for education and training of professional adult competencies. Within workplace education and training departments, what SMEs and content managers identify as a workplace education and training need was not in alignment with IDer processes to determine a learner need and what to do as intervention for instructional initiatives.

Perceptions of participants in this study held that workplace education and training initiatives were often dictated by outside stakeholders and SMEs who understand the content but were not beholden to ID pedagogical and technical acumen necessary to move beyond an assumed training need and much less focused on ToL theories and practices. If IDers are not valued for their expertise as professionals grounded in specific

competencies, it can be expected that assumptions will continue to serve in promotion of an ineffective status quo indicative of low ToL.

Chapter 5: Discussion, Conclusions, and Recommendations

Results from this study can be used to better engage IDers in the development of their pedagogical acumen as a critical component for the ways in which educative principles are used for workplace education and training assets in support of ToL. Ultimately, being able to provide effective workplace education and training allows for overall work-life balance and influences how an individual engages and connects as members of society. Helping individuals build professional skill sets and confidence to perform in their workplace roles contributes to the overall health and happiness of workplace culture thus influencing corporate growth.

Interview data suggest IDers trained in the field of education, and who intentionally moved from academia to corporate training, viewed their role differently than those who unintentionally became IDers due to unforeseen life trajectories. Many participants who happened into their profession of ID focused their IDs around content and the technology aspects of the tools used to create deliverables for a learning event. They are developers at heart focused on the tools of the trade and the content as a packaged deliverable to be completed, assessed, and checked off. Participants with experience and a background as educators, see the act of IDing as being learner and learning focused in response to some determined gap in knowledge or skill. The educational background IDer uses learning theory and puts into practice elements focused on a more clinical approach to provide a learner with a specific diagnosis and treatment.

Based on Kirkpatrick and Kayser Kirkpatrick's (2016) four levels of training, learning transfer requires higher levels of intentional instruction based in practical

application to promote ToL and sustained levels of proficiency. IDers benefit from the ability to accurately apply learning strategies with a high level of intentionality aligned with a specific plan to treat a skills or knowledge gap.

The narratives of participants who shared their ID stories suggested a real concern for apparent misalignment within the industry of ID as well as the professional identities of IDers. Those tasked with creating learning assets for professional adult learners, have expressed frustrations, and revealed ineffective practices that are misaligned with established pedagogical theoretical research. Perhaps this was due to the relatively newness of the ID industry. Research in ID competencies, processes of practice, key performance indicators, and ethical grounding was sparse. Only in the past few years, in the wake of Covid, has workplace education and training and the alignment of ToL has picked up. Corporate budgeters require ROI data and with trends showing a massive loss in return for workplace education and training ToL there is an obvious problem.

Certainly, more research grounded in qualitative and quantitative methodologies is warranted in support of the ID industry identifying and developing an empirical canon to establish IDer credentialing and identifying best-practices. Participant ToL data analysis showed confidence levels were high amongst many participants. All participants, including three focus group participants, named life-long learning as an essential competency for IDers, not only to stay abreast of industry trends, but to also build ToL in best practices of learning and facilitation of learning.

An established professional identity was harder to cull as an established norm. Participants with ownership of ID consulting businesses not surprisingly held titles in

alignment with job expectations. Ownership was also indicative of high ToL in how participants talked about their role and impact on workplace education and training material design and execution. However, IDers in corporate and academic settings stated they were in positions with minimal input as to the scoping and sequencing of content and felt more often they were put into an assistant role with assigned tasks and left out of conversations that would engage intentionality with ToL and best practices to better ensure ToL.

Education and training assets were discussed as grounded in assumptions about the learner versus using data to drive learning experience decisions grounded in actual analyzed need. Consider what one focus group participant juxtaposed in the following statement:

> A bonified biologist is not second guessed about their knowledge of biology. Their credentials are understood to be grounded in certified best practices. They have been trained, tested, and given accolades by their peers. It is assumed that if they have the distinction and accreditation they are biologists by profession. Why is this not the case for IDers? (Focus Group Participant 1)

For the ID profession, industry distinction and credentialing, while present, is not grounded in agreed upon empirical research. Sentz et al. (2019) maintained that because of the lack of research focused on ID practices and processes was not established enough to identify concrete ID industry competencies. A lack of established competencies and defined skill-sets for IDers, has left the professional status of an ID open to assumed norms and inconsistent expectations.

Participants in the study who came from an educational background and actively entered the ID career from academia, discussed how they found ways to use their skills for workplace education and training. The intentionality seemed to provide a different set of language or way of talking about purposes and process for ID.

Fundamentally, participants who happened into the ID profession focused on software tools and the final education and training product or asset. IDers focused on the product in the form of learning assets arguably align more as developers. These ID developers required a focus on content as a deliverable directive from leadership or a SME to be completed, tested, and checked off as complete. In contrast, IDers who had a background in teaching discussed their perceptions and practices in language focused on the act of IDing as being grounded in curriculum design and learning theory. IDers more grounded in curriculum development expressed the need for an IDer to have some pedagogical knowledge as an important competency needed to establish intentional objectives grounded in a learner need versus being grounded in assumed content for training product consumption.

Participants spoke about quality of course design as being jeopardized because speed in getting content out was more critical regardless or standard processes already in place for quality assurance. One example came from Focus Group Participant 3, who made the following observation: “the challenge that I’ve seen is that a lot of stuff that’s coming out is that many people mistakenly think that the response to the pandemic is what online learning is…and it’s not. You can’t develop a fully functioning course in a short turnaround time.” They went on to posit that content rigor was compromised due to

a lack of focus on quality checks and revisions. Focus Group Participant 3 argued that the first draft was often accepted as *good enough*, a position guided by corporate choices and reactive responses to the pandemic versus ID best practices proactively sought in answer to an unprecedented situation.

Interpretation of the Findings

An important aspect of qualitative research has to do with intentionality of reflection as a conduit for understanding present phenomenon to better inform future phenomenon. With that in mind, it was important to reflect on the original problem grounding this study: Low ToL outcomes and limited skill-set sustainability despite a growth in ID practices for professional adult learning. Andragogy, according to Knowles et al. (2015), was never considered to be a theoretical framework or indicative of outcomes. It was different from adult education, but instead andragogy focuses on the process of adult learning and is situational.

Pedagogical acumen should not be underscored in relation to technology skill sets required for effective workplace education and training initiatives and design of instructional deliverables. During the 1970s, there was a movement for reform in the professional identification status of teachers and the argument that teaching was not only about the action of classroom management but also required a specific pedagogical knowledge (Shulman, 1987). Teaching was not professionalized, and reform put into action teacher education requirements to help define competencies for not just the doing of teaching but the knowledge required to engage purposeful learning (Shulman, 1987).

IDers are facing this same challenge between the actions of ID and the knowledge base required. The duality of technology and pedagogy in response to workplace education and training and education creators arguably lacks a foundational grounding on which IDers can stand. Theoretical knowledge as well as course design is considered an important competency for IDers and listed in the priori of research on pedagogical acumen as well as what was available on ID competencies (Magruder et al., 2019; Richey et al., 2001). However, missing from that priori are ethnographic and narrative explored voices of IDers as well as an understanding of necessary learning paths for IDer professional credentialing.

What I have come to call intentional instructional design (IID) has the potential to bridge the gap created by ID divergences discussed in this document. Knowles (2015) encouraged educators to be intentional with the application of andragogical assumptions in their practical application and to consider situational perspectives from and for adult learners. After review of data, IID would benefit as a foundational component of the ID process. For IID to happen, more needs to be understood about IDer skill-set, knowledge building strategies, professional identities, and philosophies of practice.

Limitations of the Study

The ability to present generalized data was a realistic limitation to this study. This was due mostly in part to the choice to engage purposeful sampling. However, the engagement of a small sample of volunteer participants was an intentional choice to gain insight into the narrative of actual IDers regarding their experiences and perspectives in a rich descriptive way (Creswell & Poth, 2018). By creating a setting built on respect and

open communication, participants were open with sharing their perspectives, opinions, experiences, and knowledge. Allowing for specific voices provided a targeted insight through the narratives of active IDers in their field doing the work of creating adult learning opportunities in the workplace.

The living experiences of humankind naturally creates limitations in a study as each voice, each narrative is unique. Analysis of data from this study required purposeful consideration from a variety of narratives while looking for patterns and commonalities to better enrich the adult learning experience. Qualitative, specifically narrative, research on workplace education and training ToL is needed, specifically studies focused on those responsible for the creation of learning assets as well as under what conditions.

Participant personal responses and the nature of individual narratives, as interpreted and analyzed by another human being, which also complicated the generalizability of a study. Critical, was the need for transparent discussion on processes to support and validate findings, all of which has been presented in this written piece of work as it is understood that intentional choices in methodology created a more complex viability for generalizability and study reproduction. Arguable this was not a negative limitation as it could spark more narrative case study from whispered voices in the background and bring them forward. Until that time, generalizability will be a natural limitation since the foundation of IDer impact on workplace education and training ToL has been relatively unexplored.

Subjectivity was necessary for thematic analysis and was conducted via reflexivity where assumptions are explored, dissected, and noted (Braun & Clark, 2022).

The intentionality of reflexive thematic analysis should be viewed as a positive resource for awareness and seeking understanding (Braun & Clark, 2022). Assumptions and biases were organically present and openly discussed in one-on-one interviews and within the focus group discussion. During Phases 2 and 3 of thematic analysis, assumptions were intentionally reflected upon to present full transparency. Each source of data collection was carefully documented and reviewed with insights and interpretations.

Recommendations

In Chapter 2, a review of literature revealed a lack of studies that focused on the experiences and perceptions of IDers and how they understand and apply best practices for ToL in their designs for professional adult learning experiences. Further research studies exploring IDer perspectives and practices would be beneficial by considering industry specific norms. There was a wealth of research in relation to ID to be found in the medical and nursing fields. However, missing and a limitation for this study was the availability of studies focused on other specific industries. Because of the ID research gap, transferability factors from this study could include exploring differences, correlations, or narratives in the auto industry, insurance industry, marketing industry, or financial industry. Exploring how specific industries initiate ID might reveal competency differences required to support ToL specific to professional development for employees as well as provide space to consider semantics and how language might influence methods of practice and need for L&D.

Quantitative survey studies would support revealing potential qualitative areas in need of more understanding. Recommendations on how IDers are themselves trained and

under what circumstances may also support the idea of professionalizing the ID industry and IDer expert status including positions, perspectives, and practices in the ID profession as well as whose voice steer initiatives. One area hinted at as a possible immediate need for clearer ID competencies has to do with the mass exodus of professional educators, in the United States, leaving classroom education for ID. Understanding the correlations and connections from a survey study could provide immediate data to delve into this phenomenon. However, more phenomenological, grounded theory and narrative studies could provide a deeper more humanistic understanding the social constructs at play.

Recommendations for future studies align with what was discussed amongst participants in this study and the reality that ID is relatively new in scope and popularity, but growing. Building a canon of empirical research would require a broader understanding about how ID connects with more historical theoretical sandboxes such as human capital, pedagogy, experiential learning, and organizational management.

Finally, there was a need to establish understood and accepted competencies for IDers and the practices and processes for designing professional adult education and training assets and should include the perspectives coming from the ToL empirical research canon.

Implications

In my analysis of data, the findings of this study provide an understanding and insight into IDer professional practices, perceptions, and ToL. Being able to focus on these areas and gain a first-person narrative provided a look into the frustrations,

challenges, and concerns of IDers in the trenches. The implications suggest a clear dichotomy between background knowledge and skill sets IDers bring to the table. Those with educative backgrounds and a high sense of pedagogical acumen approach their practice differently than do those who do not have this background experience. However, those who more organically became IDers also voiced the importance of finding a way to gain pedagogical acumen even if they did not come into their careers with it already. This would imply that there was a lack of intentional pedagogical acumen expectation in the competencies of IDers, certainly what employers in the workplace are seeking for designers of adult workplace education and training assets.

More research to support a better understanding of competencies for IDers is needed, from IDer perspectives and gaps they feel need filling. Furthermore, findings from this study implicate a need to better understand how the IDer ToL and pedagogical acumen, or lack thereof, impacts ToL via the learning assets created. Questions about the professionalization of the field of ID will be important to deal with the divergences discussed around how employers utilize IDer expertise as a professional voice at the table.

Conclusion

As an experienced IDer, this study and questions framing it, were relevant to my own perceptions and experiences. Digging through literature and learning about this topic from expert research and writing as well as revelations about low ROI and the high financial investment in training and professional development was supported by interviewed participants.

However, little has been explored in regards to the actual processes of intentional curriculum and ID for ToL. The number of studies on this topic were, and continue to be, limited. As an insider, it was a natural curiosity to explore the perceptions and practices of IDers tasked with creating corporate curriculum for professional adult learners. ToL has historically been suggested to be problematic for ROI in workplace education and training goals and outcomes. Furthermore, this problem seeps into the world of adult learners and their professional aspirations as well as overall happiness (Becker, 1993; Gadzali et al. 2023).

Specific intention for this study was to focus on the perceptions of how IDers understood and utilized adult learning theories as well as their own semantics through spoken narratives regarding intentionality for ToL. Participants of this study made it clear they too desired overall happiness but attested to real frustrations due to industry inconsistency and workplace education and training misalignments in the ID process, competency expectations, and professional identities within their organizations.

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Appendix A: One-on-One Interview Protocol

This interview protocol was researcher created and is an open-ended questionnaire to be utilized for participants in one-on-one interviews semi-structured interviews.

Interviewees can opt out of answering any question for any reason without judgment or consequence. Likewise, answered questions may be expanded upon.

1. Demographic Information (all information was kept private; pseudonyms applied)
    1.1. Name
    1.2. Contact information
    1.3. Position & title
    1.4. Years of experience
    1.5. Degree and/or credentials
2. Practices and Experiences
    2.1. How did you become an Instructional Designer? (ask if they would be willing to share resume/CV)
    2.2. How would you define instructional design/Instructional Designer?
    2.3. Explain your primary role; activities/tasks?
    2.4. How accurate is your title/role in relation to your responsibilities?
        2.4.1. What competencies do you feel support the work you do?
        2.4.2. How is learning and development attended to in your organization, and how does that align with your own definition?
    2.5. What types of training are you responsible for creating and for whom?

2.6. What challenges do you face in your daily tasks/expectations; future endeavors; career pathing?

2.7. What skills/knowledge do you most/least engage in in support of decisions being made for instructional design and curriculum development?

2.8. What were the most important professional development courses you have personally completed and how were they beneficial in how you carry out your role as an ID?

2.9. What are your experiences with adult education?

3. Use of Curriculum Development, Adult learning/education & Learning Theories

3.1. What types of training models are utilized in your organization and how is it decided?

3.2. How do you go about building adult learning courses for your corporations learning and development needs? What is the process?

3.3. How do you consider the process of ToL and its relevance to the learning designs you create?

3.4. What is your understanding and use of adult learning theories in what you do?

3.5. How do you support ToL and intended outcomes in the curricula you design and develop?

4. Professional Perceptions and Self-Actualization

4.1. What is your confidence level in your development of curricula for workplace training and corporate education?

4.2. How do you present your expertise and use of resources?

4.3. What is your philosophy of instructional design?

4.4. What advice would you give someone considering becoming and Instructional Designer? What must they need to know and be able to do?

4.5. What challenges do you see in corporate education and the role of instructional designers creating corporate curriculum to meet those challenges?

Appendix B: Focus Group Interview Protocol

This interview protocol was researcher created and is an open-ended questionnaire to be utilized for participants during a focus group semi-structured discussion.

Participants may opt out of providing responses to any question or stream of discussion for any reason without consequence. Likewise, responses may be expanded upon by researcher.

1. Demographic Information (all information was kept private and asked individually of each participant prior to opening the discussion group for all; pseudonyms applied and will be used during the semi-structured discussion).
    1.1. Name
    1.2. Contact information
    1.3. Position & title
    1.4. Years of experience
    1.5. Degree and/or credentials
2. The Instructional Design Profession
    2.1. How would you define instructional design/Instructional Designer?
    2.2. What competencies do you feel are important for an Instructional Designer to have and at what level of their career? Why?
3. Use of Curriculum Development, Adult learning/education & Learning Theories
    3.1. In what ways, if at all, is theory relevant and/or beset utilized when designing adult learning/education courses?

3.2. How, if at all, are instructional design processes like ADDIE, AGILE, Gangé, etc. important in practice?

3.3. What are your concerns regarding ToL and its relevance to the learning designs you create?

3.4. In what ways should adult learning theories be applied in instructional design?

4. Professional Perceptions

4.1. What trends do you consider important for the future of the instructional design profession?

4.2. What advice would you give someone considering becoming and Instructional Designer?

4.3. What challenges do you see in corporate education and the role of instructional designers creating corporate curriculum to meet those challenges?

Volunteers will be asked if they have a professional instructional design philosophy statement they would be willing to provide the researcher prior to the focus group discussion. Voluntarily shared documents will not be discussed with the group.

Appendix C: One-on-One Interviewee Recruitment Flier

Corporate Curriculum: Instructional Designer Practices for Professional Adult Learning

A Dissertation Research Study

REQUEST FOR RESEARCH STUDY VOLUNTEERS

IF YOU HAVE…

3+ YEARS EXPERIENCE DESIGNING ADULT LEARNING FOR WORKPLACE TRAINING AND/OR HAVE PRODUCED 3+ EDUCATIONAL PROGRAMS/PROJECTS W/IN THE LAST 3 YEARS… YOUR PARTICIPATION IS REQUESTED

Purpose of this research study

To understand the experiences and perceptions of instructional designers responsible for workplace training/corporate education design and development for professional adult learners.

Participation in this study involves:

- A private one-on-one interview conducted online or via phone
- A Time commitment of approximately 2 hours
- Your participation is strictly voluntary

To find out more about this research study contact:

- This information has been redacted.

Appendix D: Focus Group Recruitment Flier

Corporate Curriculum: Instructional Designer Practices for Professional Adult Learning

A Dissertation Research Study

REQUEST FOR RESEARCH STUDY VOLUNTEERS

IF YOU HAVE…

5+ YEARS EXPERIENCE DESIGNING ADULT LEARNING FOR WORKPLACE TRAINING AND/OR HAVE A LEADERSHIP/MANAGEMENT ROLE … YOUR PARTICIPATION IS REQUESTED

Purpose of this research study

To understand the experiences and perceptions of instructional designers responsible for workplace training/corporate education design and development for professional adult learners.

Participation in this study involves:

- Engage in a focus group semi-structured discussion with no more than five (5) participants.
- A Time commitment of approximately 2 hours
- Your participation is strictly voluntary

To find out more about this research study contact:

- This information has been redacted.

Appendix E: Coding Memo-Book Example

Participant
P2
P3
P6
P1
P13
FocusGroup-Coded Transcript
P5
P4
P7
P8
P10
P11
P12
P13

Quirks Summary

Quirk Title	**Parent**	**Grandparent**	**Total Sub Codes**
Intentionality of training purpose			9
Intentionality of content	Intentionality of training purpose		2
Realizing ID best practices	ID is a profession		3
Tech background needed			
Stakeholder influences on content	Corporate not engaging ID at the right time/for right purpose		7
lack of appreciation for ID profession	ID is a profession		3
ID is hard	ID is a profession		3
ID is a profession			10
Perception of what an ID is	ID is a profession		7
Suggestion for ToL			3
Emotional connection to ID motivation			2
Principles of Adult Learning mentioned			4
ID as clinical analogy	Realizing ID best practices	ID is a profession	1
SME as ID-disadvantage	Corporate not engaging ID at the right time/for right purpose		5

Design for whose instructing content	intentionality of the profession of ID	Intentionality of training purpose	1
Business acumen - tying ID back to business objectives			
Understanding learner outcomes in relation to company	emphasis on learner-centric/needs of the learner impact on skills/design	Intentionality of training purpose	6
ID credibility	ID is a profession		4
Corporate vs. Academia and professional acceptance	ID credibility	ID is a profession	4
Talking with IDers about competencies	ID credibility	ID is a profession	1
Acknowledging ID competencies	ID is a profession		3
Intentionality of IDer	Intentionality of training purpose		3
intentionality of the profession of ID	Intentionality of training purpose		4
Confidence is part of needed competencies	Emotional connection to ID motivation		4
Relationship between ID-SME	Emotional connection to ID motivation		4
Perceptions of learning	emphasis on learner-centric/needs of the learner impact on skills/design	Intentionality of training purpose	2
Relational aspect of learning and the IDer	Emotional connection to ID motivation		4
Designing for not just knowledge but change/new behavior	Suggestion for ToL		1
focusing on the learner vs content is an important competency to support adult learning	emphasis on learner-centric/needs of the learner impact on skills/design	Intentionality of training purpose	5
lack of educational background makes ID difficult	ID is a profession		3
Poor assumptions about adult learning has created ineffective training	Principles of Adult Learning mentioned		7

Corporate not engaging ID at the righ time/for right purpose			5
Misconceptions of what training can do for the company			
Falling into the ID profession			
Learning ID skills by doing it vs professional training			
emphasis on learner-centric/needs of the learner impact on skills/design	Intentionality of training purpose		3
lesson planning language for planning module			
Lifelong learning is needed for ID	lack of educational background makes ID difficult	ID is a profession	1
An ID is not necessarily a techie and vice versa	lack of educational background makes ID difficult	ID is a profession	3
Lack of adult learning knowledge is problematic for good content design	lack of educational background makes ID difficult	ID is a profession	2
Mention of having an educational background	lack of educational background makes ID difficult	ID is a profession	1
Accidental ID	lack of educational background makes ID difficult	ID is a profession	
Lack of pedagogical knowledge creates ID challenges	lack of educational background makes ID difficult	ID is a profession	2
stakeholder assumptions that training is the problem	Stakeholder influences on content	Corporate not engaging ID at the right time/for right purpose	3
not involving the ID sooner in the training processes	Corporate not engaging ID at the right time/for right purpose		2
Knowledge of content does not equate to knowledge of pedagogy or ability to do ID	lack of educational background makes ID difficult	ID is a profession	2
Organization Culture about training	Corporate not engaging ID at the right time/for right purpose		4

leadership support and promotion of learning influences ID processes/initiatives	Stakeholder influences on content	Corporate not engaging ID at the right time/for right purpose	1
importance of understanding learning theories and utilize them in the ID practice			
Working with SMEs/stakeholders as a professional but not overwhelming them as an expert	SME as ID-disadvantage	Corporate not engaging ID at the right time/for right purpose	2
IDer must be intentional in ensuring the learning is considering the learner/audience	emphasis on learner-centric/needs of the learner impact on skills/design	Intentionality of training purpose	2
intentionality in the use of adult learning theories	Principles of Adult Learning mentioned		1
adult learning requires understanding varied modalities to be used for specific audiences/purposes	being cognizant of the adult learner needs and external stressors that may impact learning	Principles of Adult Learning mentioned	1
Adult learner's careers are dependent on their training success	being cognizant of the adult learner needs and external stressors that may impact learning	Principles of Adult Learning mentioned	3
being cognizant of the adult learner needs and external stressors that may impact learning	Principles of Adult Learning mentioned		5
Learning theory should not always be a direct discussion			
Understanding the gap/problem by asking intentional questions			
Challenge of wide variety of skillsets and comfort levels amongst ID-training designers	Perception of confidence as a challenge	Emotional connection to ID motivation	2

Perception of confidence as a challenge	Emotional connection to ID motivation		1
Assumption that online learning is answer to Covid crisis	Covid has created an environment for ID profession to shine		3
Covid impact on quality of training production	Covid has created an environment for ID profession to shine		3
Covid has created an environment for ID profession to shine			1
future of ID industry			
Assumptions made by new IDers who maybe don't have training in the industry and the impact on quality	lack of educational background makes ID difficult	ID is a profession	1
Novice vs. experienced ID pedagogical acumen	lack of educational background makes ID difficult	ID is a profession	2
intentionality for ToL goal and transparency of that expectation	ToL intentionality	Suggestion for ToL	4
Invoking experiential learning practices for intentional goal of ToL			
ToL not discussed enough	ToL intentionality	Suggestion for ToL	3
ToL intentionality	Suggestion for ToL		1
Importance of engaging learning theories as best practice	ToL intentionality	Suggestion for ToL	1
IDer beliefs	Emotional connection to ID motivation		1
the education of new IDers	lack of educational background makes ID difficult	ID is a profession	4
empowering the ID as a professional	Realizing ID best practices	ID is a profession	1
Missing the mark for ToL in the ID industry			
TOTAL NUMBER OF CODES	216		
TOTAL NUMBER OF QUIRKS	62		

Quirks Canvas - Primary

Quote Sample

Memo	Quote
Transcription error: [Text is Tech]	I think if you don't have a good grasp on technology you don't have a good understanding of that technology it is going to be really hard to take your script or take your storyboard and just pass it off onto somebody else to make it because when you pass it off and they're going to put their ideas into it they're going to put their spin on it and then you got to come back to you anyways to like get it fixed I'm seeing that now with one person who does not have a text background
Question on challenges	I think this came up a lot in the past two years when I was looking for like employment and stuff I think your current challenge with instruction design is that everybody has a different idea of what instructional design is

Memo	Quote

Does this connect to ID intentionality?	And if they're not working at it, and they're not practicing, and they're not committed with blood, sweat, and tears, we can't expect the light to come out on the other side
Competencies are best defined by the context of where working. This is interesting in asking who is defining the profession of ID or what...where is a different perspective meaning there could be any variety of "versions" of competencies and how do IDers learn intentionality or are there foundational competencies that once mastered you can build/create new competencies?	, the context and where you're working matters most and how you define that
Suggested to be very important by FG3	how you get the most out of the subject matter expert without making her or him feel less, or that they are vital to the process. It's very important
this is interesting as it suggests holding back as an expert to not overwhelm the SME. the ID then must be able to acquire the content from the SME all the while the ID must still maintain their expert status as an educational expert...is educational the right word here? Pedagogical expert?	it's important to have a good understanding of the different adult learning theories that are out there, just to understand the different learning preferences that many people have to try and appeal to as many of those as we can. But also to do it in a way that's not overwhelming to the subject matter expert to where they just shut down
This was specific to the response about Covid forcing online learning modalities and the crisis it caused for those in the field of training.	I think the challenges that are happening right now for us is that there's a great deal of people with varying amounts of skillsets, abilities, and experience and comfort in doing this