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Understanding Planned Change Among Remote Nonfaculty Employees in Higher Education

Erin Lubin
Walden University

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Erin Lubin

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Review Committee

Dr. Richard Hammett, Committee Chairperson, Education Faculty

Dr. Mark Earley, Committee Member, Education Faculty

Dr. Donald Yarosz, University Reviewer, Education Faculty

Chief Academic Officer

Eric Riedel, Ph.D.

Walden University

2017

Abstract

Understanding Planned Change Among Remote Nonfaculty Employees
in Higher Education

by

Erin Heather Lubin

MS, Chestnut Hill College, 2005

BA, Temple University, 2003

Doctoral Study Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Education

Walden University

October 2017

Abstract

Implementing planned change in online university divisions with remote nonfaculty employees is a unique challenge. The problem that compelled this study was the need to understand the challenges of implementing planned change for a group of geographically remote nonfaculty employees who served as field team members (FTM) in an online university's support division. The purpose of this research was to explore change from the perspectives of remote FTM, their managers, and the division's Vice President to better understand and suggest research-derived strategies to make change initiatives more meaningful and inclusive. The qualitative ethnographic design was informed by systems theory, Tuckman and Jensen's theory of group dynamics, Burke-Litwin's model of organizational change, and Lewin's change theory. The 13 participants had a minimum of 9 months in their respective positions. Semistructured focus group interviews were combined with individual interviews to address research questions focusing on organizational factors, team dynamics, leadership dynamics, remote experiences, and organizational climate. Each participant group identified its own set of priorities that need to be addressed for positive change to occur. Additionally, change management should include communication strategies and collaboration to reduce change barriers. A policy recommendation was developed based on the findings proposing strategies to better implement and manage planned change. The purposeful inclusion of geographically dispersed employees in change processes will help shape positive perceptions, thus making change initiatives more meaningful and inclusive for remote team members.

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Dedication

In some respects, this was the hardest part of my project study to write. There are so many people to whom I want to dedicate this project. My husband, Aaron; my parents, Norman and Stephanie; Rick and Megan, and my late grandmother, Irene. Without their support, guidance, and love, I would have never completed this project study. Thank you for continually pushing and not letting me give into fear. Additionally, I want to dedicate this to my two dogs, Kermit and Gonzo, who loyally sat by my feet during this process.

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Section 1: The Problem

The growth of online learning, technology, and globalization has made higher education more accessible (Altbach, Reisberg, & Rumbley, 2009). This accessibility has helped to produce a competitive marketplace in which institutions vie for students, funding, ranking, and status. Faced with a sudden increase in competition from private and for-profit institutions, many traditional higher education institutions have used planned change to offer distance learning courses and programs (Calloway, 2012). Marshall (2010) asserted that, to be effective, higher education institutions must invest in widespread planned change. Furthermore, investment in planned change and organizational growth must become a crucial strategic focus for institutions' leadership (Marshall, 2010). Additionally, as the challenges of higher education become more complex, planned change can be used to address a number of other challenges: political and economic conditions, enrollment and retention goals, staff and faculty issues, and implementation of new technologies and programs. *Planned change* is defined as activities within an organization that are goal oriented and intentional. These activities may be intended to change employee behaviors and help the organization adapt to changes within the organizational environment (Lunenburg, 2010).

Planned change is embedded in the culture of higher education, as institutions are constantly called on to meet the changing needs of students, faculty, and staff (Barnett, 2011). Barnett (2011) emphasized that implementing planned change successfully requires a clearly defined strategic vision. During the planned change process, leaders

often fail to consider the complexities of implementing a large transformation within internal departments. Although key stakeholders strive for innovation within an organization, planned change often is a slow and daunting process (“A Critical Analysis,” 2012).

Ellis, Margalit, and Segev (2012) stated that organizations must be capable of adapting to the current climate in order to survive and grow. To attract students who have grown up in the technology era, many higher education institutions are shifting from offering only traditional classroom education to adding an online learning component (Wright & Holmberg-Wright, 2012). Institutions implementing such changes confront complex issues that include adopting new teaching and learning methods as well as developing new programs to attract online students. As institutions invest the time and resources required to achieve planned change, administrators may be under increased pressure to produce a financial return by increasing enrollment (Wright & Holmberg-Wright, 2012). Conversely, ignoring the changing educational climate can result in decreasing student enrollment and retention, which in severe cases can threaten an institution’s survival.

Ellis et al. (2012) noted that the ability to adapt and implement systemic planned change in volatile markets improves an organization’s performance. When implementing planned change, executive leaders often focus on the big picture without considering the specific needs of the individual departments tasked with putting the changes into action.

According to Kezar (2001), universities often adopt planned change reactively rather than proactively. Similarly, Nutt (1992) found that planned change usually occurs during marketplace changes or after an organization or industry receives negative attention for its practices. Reactive change is always at least one step behind proactive change. Taking a proactive approach to planned change encourages employee participation in the process, which can increase the likelihood of successful implementation (Ellis et al., 2012). Another mistake made by many organizations, including higher education institutions, during the planned change process is failing to recognize the need for and make small adjustments on the local level (Hechanove & Cementina-Olpoc, 2013).

The objectives of a planned change must align with institutional goals. For example, “offering a quality higher education experience aligns the goals of the university, student, and community” (Drew, 2010, p. 58). Planned change is not limited to institution-level change; it can be implemented on a departmental level as well (Drew, 2010). Such change can be executed successfully as long as its aims are aligned with institutional goals and department heads are given the authority to implement it (Nutt, 1992). Without the support of executive leadership, departments often lack the autonomy needed to execute planned change (Drew, 2010; Kezar, 2001).

Higher education institutions also use planned change to carry out future initiatives (Drew, 2010). Two components are crucial to implementing successful planned change initiatives: synchronizing each department’s goals and giving department

heads the authority to make changes (Drew, 2010). Department heads often serve as catalysts driving effective planned change. Through this study, I explored how employees working in a remote department of a higher education institution implemented planned change. The purpose of this research project was to examine innovative ways to support remote employees during periods of significant planned change.

The Local Problem

This study's target institution was an online university with more than 50,000 students from all 50 states and more than 140 countries, who were enrolled in bachelor's, master's, and doctoral degree programs. Hereafter, the target institution will be referred to as *the university*. The university's onsite employees routinely form meaningful relationships with their colleagues and team members. Leaders are present at all organization levels of the university, and they interact with onsite employees on a daily basis.

The university implements planned change by communicating its goals and expectations to team members via email communications, conference calls, and internal documents. Additionally, onsite teams and employees participate in impromptu departmental meetings designed to ensure that change is being implemented properly. Onsite teams and employees participate in the planned change process and provide meaningful feedback during its implementation.

In contrast to onsite employees, the university has a number of remote employees, such as field representatives, whose geographic locations limit their ability to participate

in face-to-face meetings. Field representatives work independently in different locations across the United States to brand the university, recruit potential students, and form organizational partnerships. The inherent autonomy of the field representatives' daily functions limits their interaction with employees at the university's headquarters. Generally, field representatives are unable to attend onsite meetings where planned change is discussed. For remote employees, communication with the university typically is limited to their interactions with regional managers who promulgate and clarify job-related policies.

Field representatives have experienced numerous departmental mergers and workforce reductions that have resulted in expanded daily responsibilities and increased duties (Blumenstyk, 2005; Drowley, Duncan, & Brooks, 2013). In addition, these employees have been affected by upgraded technology, expanded programs (including those with sister schools), and revitalized educational partnerships (J. Peters, personal communication, October 30, 2014).

According to the university's remote development manager, while executive leadership conceptualizes the execution of planned change for remote employees, perceptions of change vary among field team members (J. Peters, personal communication, October 30, 2014). A business development representative with intimate knowledge of the problem explained that executive leadership's lack of regular interaction with remote employees has led to halfhearted implementation efforts by these employees (V. Delleville, personal communication, November 17, 2014). For example,

the field team was tasked with promoting a sister school and changing its job objectives, but these initiatives did not last, and the team reverted to its original objectives (J. Peters, personal communication, October 30, 2014). Furthermore, Jennifer Peters (personal communication, October 30, 2014) stated that whereas changes usually occur in stages for onsite employees, change needs to happen in one step for remote employees. A lack of consistent communication with executive leadership during the change process causes stress among remote employees that can decrease productivity and cause employees to disconnect from the change process and their daily responsibilities (V. Delleville, personal communication, November 17, 2014). Valerie Delleville explained that remote employees are unable to participate in the change process or provide feedback about planned change because they are not invited to attend onsite meetings (personal communication, November 17, 2014). Additionally, the fact that remote employees have a harder time establishing relationships with colleagues and supervisors can result in a lack of trust that hinders them from sharing ideas during weekly team meetings (V. Delleville, personal communication, November 17, 2014).

A recent example of planned change affecting the field team—the Department of Education’s July 2011 rules regarding student-facing employees—is discussed in detail in the section covering planned change and field teams. The problem that compelled this study, therefore, was the inherent inefficiencies and challenges of implementing planned change for geographically remote employees who serve as field team members at the university.

Rationale

The role of field representatives at for-profit universities has evolved with the changing higher education market (Singh, 2011), resulting in significant changes in these individuals' internal and external roles. The field team is experiencing greater competition as traditional universities expand online offerings, launch marketing campaigns to compete with for-profit institutions, and hire on-the-ground representatives for student recruitment and enhanced student and client support. Students' needs, behaviors, and expectations have also challenged field representatives to offer personalized customer service not only for students, but also for partners and clients. Much planned change for the university's field team is focused on implementing strategic business decisions for all of the university to remain competitive in the current regulatory environment. Planned change has also focused on enrollment trends, business development initiatives, and educational partnerships. Organizational change often is influenced by political reports and leadership (Nasim & Sushil, 2011), and these dynamics have influenced changes in field representatives' roles as well.

Communication Challenges and Remote Employees

The university's remote employees are faced with challenges similar to those of remote employees who work for other large organizations. For example, remote employees travel frequently and rely on technology, such as smart phones and email, as their primary communication source (Hoang, Nickerson, Beckman, & Eng, 2008). Other researchers have reported that the majority of communication in educational institutions

takes place via emails and conference calls (Percival, Vogel, & Muirhead, 2011). Field representatives often are asked to multitask by participating in conference calls during client visits, tradeshows, and travel time. Due to scheduling conflicts, field representatives often are unable to participate in conference calls and therefore must rely on colleagues or follow-up communications to learn what they have missed (Percival et al., 2011). While researching departments that work remotely, Hoang, Nickerson, Beckman, and Eng (2008) found that planned change was announced unexpectedly during weekly team conference calls. The university's remote employees have experienced all of these communication challenges firsthand.

The university's field representatives primarily work independently, and it is rare for them to work together in the field. Communication from the institution is limited to a weekly team call, after which the onus is on the field representative to reach out to others. Ye (2012) highlighted some of the challenges of managing telecommuters: communication with remote employees, feelings of isolation experienced by remote employees, and the inefficiencies of collaboration efforts between remote employees and their managers. Social isolation due to a lack of consistent feedback from direct leadership can increase employees' fears about job advancement or performance (Mello, 2007). As noted by Perry (2006), fear and stress can also impede effective adult learning. In a similar fashion, fear and stress from workplace uncertainty may serve as a barrier to field team members' work effectiveness (Swaminathan & Rajkumar, 2013). Remote

employees' challenging communications environment highlights the need to define effective methods for implementing planned change successfully.

Team Dynamics and Organizational Change

“Change happens” (Summers, Humphrey, & Ferris, 2012, p. 314). Planned change has a powerful effect on organizational and team dynamics. Organizational dynamics influence the ability of teams and individuals to accept change. The dynamics of teams, especially remote teams, can shift during times of change. Individual team members must be able to adapt by adopting new behaviors and thought processes (Christian, 2010). Engaging individual employees in the change process influences their willingness to embrace change (Barton & Ambrosini, 2013). Individual employees generally want to be successful, and those who are engaged look for ways to integrate their personal and professional goals into the change (Bell & Barkhuizen, 2011).

Planned change can create pressures for any department, especially remote divisions, to adapt to fluctuations in expectations, structures, and norms (Josefy, Kuban, Ireland, & Hitt, 2015). Team structure, tasks, and members can be disrupted during change, which may leave individuals to complete team assignments. Moreover, planned change affects how team members communicate with one another. Morganson, Major, Oborn, and Verive (2010) reported that remote employees were frustrated by their lack of involvement in change processes. Field representatives rely on direct managers to articulate and lead the change process. Barton and Abrosini (2013) stated that often, leaders lack an understanding of the steps needed to implement change. A central issue

for management is identifying key factors that can influence employee performance during organizational change (Madsen, 2011).

Mulki, Locander, Marshall, Harris, and Hensel (2008) indicated that a trusting relationship between employers and remote employees can hold remote teams together, replace traditional organization hierarchy and business norms, and influence how remote employees adapt to planned change. Employees who feel appreciated and engaged are more likely to be active participants in the change process. Additionally, developing a team culture of trust requires leadership to invest in coaching and incentive strategies (Christian, 2010; Koehler, Philippe, & Pereira, 2013). In summary, leadership may ultimately find it helpful to empower remote employees by including them discussion and decision-making processes during planned change.

Anxiety and Isolation in Remote Employees

By the very nature of their jobs, remote employees often lack social and emotional workplace interactions. This void can cause feelings of isolation among these employees (Mulki & Jaramillo, 2011). Additionally, a perceived a lack of support from their employer can increase remote employees' stress levels (Mulki & Jaramillo, 2011). While on-site employees have the benefit of face-to-face relationships with their peers, field representatives' work relationships are maintained via technology (Dahlstorm, 2013), which can cause the frequency of quality of these relationships to suffer. Dahlstorm (2013) found that isolation from the corporate culture is a major concern for

remote employees, and that this problem may be exacerbated during times of planned change.

Christian (2010) stated that social networks, which consist of informal relationships in the workplace, are the framework of organizational culture and influence how and if change is accepted and implemented. Remote employees lack the opportunity to immerse themselves in organizational culture and forge informal relationships.

Marshall, Michaels, and Mulki (2008) found that remote employees' sense of isolation increases when they miss or are not included in meetings, whether formal or informal.

Robertson and Vink (2012) stated that, unlike onsite employees, remote employees can feel that they have a larger workload and need to overperform. Lack of consistent feedback from direct leadership can lead to social isolation that can increase remote employees' fears about job advancement or performance (Mello, 2007). Additionally, remote employees may feel excluded from promotions or big projects. Dahlstorm (2013) reported that remote employees felt invisible when opportunities for advancement arose. Furthermore, remote employees have limited access to onsite learning and professional development, which may increase their perception of having limited professional growth opportunities (Fay & Kline, 2012).

Social isolation can increase remote employees' fears because they rely on their psychological perceptions of colleagues and the organization (Dahlstorm, 2013). Remote employees have limited social involvement in organizations and struggle to develop a work identity that aligns with the organization and culture, including the social subculture

(Koehler et al., 2013). Remote employees have limited opportunities to form interpersonal relationships with their peers due to their lack of participation in the social environment of the onsite workplace (Mulki & Jaramillo, 2011). Therefore, remote employees miss meaningful relationships with colleagues that are formed during shared experiences and daily interactions.

Fay and Kline (2012) contended that informal communication with leadership and colleagues creates opportunities to forge interpersonal relationships, creating positive interactions that can help to reduce stress and anxiety. Furthermore, remote employees' sense of anxiety may develop during times of organizational change because of limited political and organizational alliances in the corporate environment (Mello, 2007). Remote employees feel a greater sense of isolation that can heighten their sense of anxiety when coworkers and leaders are unavailable (Fay & Kline, 2012; Mulki et al., 2008).

Another challenge for remote employees may be the lack of clearly defined expectations from leadership. Ye (2012) found that employees who worked remotely often reported not having a clearly defined job description for their position. Additionally, anxiety produced during organizational change may cause field representatives to ignore boundaries between family and work. The lack of clearly defined work hours and strict deadlines can result in team members working from early morning until late at night.

Field representatives' travel schedules also can take a toll on personal and family time. Moreover, during times of organizational change, administrative tasks may increase

while timelines remain the same or shorten, which can increase field representatives' overall anxiety and stress. As noted by Perry (2006), fear and stress can impede adult learning. Remote employees face challenges not faced by onsite employees, and these challenges are likely to be intensified during planned organizational change. Specific attention needs to be given to preparing remote employees for planned change in their organizations.

Developing and adopting well-defined procedures for implementing planned change—tailored to remote employees' needs—could help reduce their anxiety and stress and maintain or increase their work effectiveness and productivity. Such procedures also could help mitigate many of the difficult, and perhaps unnecessary, work-related challenges they face. Better methods for incorporating planned change could increase remote employees' productivity, efficacy, and job satisfaction while reducing feelings of isolation, anxiety, and solitude that come from scheduling conflicts and communication challenges (Grant, Wallace, & Spurgeon, 2013). These efforts should include specific strategies that connect remote employees to the organization during periods of planned change (Taskin & Bridoux, 2010).

In summary, evidence about factors related to team dynamics and direct involvement in planned change provides a call from the literature to have a clear, effective method for implementing change across divisions that employ remote teams.

Planned Change at the University

Current planned change at the university focuses on making strategic business decisions to remain competitive in the current regulatory environment. The following discussion is a specific example of how planned change has been implemented at the university in the past.

In August 2010, the U.S. Government Accountability Office (GAO) released a report detailing deceptive marketing and recruitment practices being used by for-profit higher education institutions (Bennett, Lucchesi, & Vedder, 2011). The GAO report resulted in the Department of Education (DOE) issuing new rules, effective July 2011, regarding the way in which for-profit institutions can market to and recruit students (Deming, Goldin, & Katz, 2012). The rules were designed to ensure that higher education institutions were putting students' best interests ahead of profit (Bennett et al, 2011). Employee performance reviews and compensation could no longer be tied to any student-facing activities (Bennett et al., 2011). Specifically, the new rules disallowed bonuses and income increases based on student recruitment and enrollment, a strategy most for-profit institutions used to motivate employee performance (Braucher 2012; Deming et al., 2012). In addition, for-profit higher education institutions were mandated to disclose program data including but not limited to graduation rates, job placement rates, median student loan debt, and ability to transfer credits for all programs (Braucher 2012; McCormick, 2010). To ensure compliance, the DOE rules stated that any for-profit

institutions found engaging in misleading or deceptive marketing and recruitment tactics could lose eligibility to participate in Title IV funding (Braucher, 2012).

For-profit universities had to make many changes to comply with the DOE rules. Some universities addressed the changes proactively by changing field representatives' roles and responsibilities before the rules were finalized (Thomas, 2011). The university's executive leadership addressed the changes after the July 2011 DOE rule change. The university's program included creating clear objectives and expectations for each field representative, investing in technology upgrades for field representatives, developing new internal reports that tracked field team progress, and implementing a business development initiative to form alliances with corporations to attract new students and promote social change. The program, including the outline and expectations of the planned change, was presented to the field team at its yearly summit. Individual field representatives were empowered to implement the new initiatives in the way that best fit their working style and territory. Not surprisingly, the implementation of the planned change varied by representative.

Definition of Terms

Following are definitions of key concepts used in this study.

Anxiety: An emotion characterized by feelings of worried thoughts, fear, tension, and physical changes that arise from uneasiness about the outcomes of a situation or event (Kazdin, 2000).

Distance education learning: Education programs and processes where students and faculty are separated by time and distance (Estelami & Rezvani, 2011).

Field representative: Member of a team who acts as a communication channel providing customer support, developing new business leads, and driving sales. Field representatives implement local marketing plans to increase brand awareness within a specific territory (Mulki et al., 2008).

Group dynamics: How people work together, as well as the effects that working together has on the quality of group/team work (Lewin, 1992).

Online learning: Although institutional definitions of online learning vary, most require a large portion of a course, typically well over half and as much as 80%, to be conducted asynchronously using web-based technologies (I. Allen & Seaman, 2010).

Organizational climate: Employees' perceptions of and reactions to the work environment (Anderson, 2012).

Organizational culture: Assumptions, values, missions, visions, and beliefs that form the perceptions of an organization's personnel. When perceptions are positive, organizational climate tends to be positive (Anderson, 2012; Yoder, 2004).

Planned change: Intentional, goal-oriented organizational activities that seek to change employee behaviors and/or help the organization adapt to internal or external changes (Lunenburg, 2010).

Remote employee: Employees who do not work in an office but conduct business at home, when traveling, or virtually anywhere in the world during paid hours (Mackenzie, 2010).

Stress: A mental and emotional tension and physical response resulting from a demanding situation or change (National Institute of Mental Health, n.d.).

Social dynamics: The study of interactions between individuals and the social responses of groups (Psychology Dictionary, n.d.).

Team dynamics: The nature of team members' working relationship with each other and their environment. Team dynamics include psychological forces, such as individual team member personalities, which influence a team's performance and behavior (Yardley, 2014).

Telecommuting: Performed by employees who have an alternative work schedule and location; includes working from home or offsite (Madsen, 2011).

Significance of the Study

The explosion in the popularity of online learning has caused a paradigm shift in higher education and has created opportunities for institutions to enroll students from all over the country and the world. These institutions rely on remote employees to serve as the local face of the university in order to attract the new population of online students. As institutions expand to include online and blended learning in an effort to grow and increase profitability, the leadership of such institutions will be implementing a great deal

of planned changes. Therefore, it was crucial to examine the complexities of planned change and its effects on remote employees in the higher education setting.

Through this study, I explored both how planned change affected university field representatives as well as how they impeded or facilitated it. The leadership of universities or companies may use these findings to incorporate the needs of remote employees into the design of future planned change initiatives and help reduce the barriers to successful planned change. Finally, information gleaned from the study may help organizational leaders to encourage increased collaboration between onsite and remote departments, gain a better understanding of departmental functions, and improve employee morale. In turn, such results could contribute to increased employee efficiency and productivity, a stronger sense of belonging among remote employees, and a greater dedication to the institution's mission and vision.

Research Questions

Past and current research on planned change has examined such change in terms of leadership and corporate culture, as well as from the perspectives of resident employees, with most research focusing on the latter. Little research has investigated planned change with remote employees and departments, and none has explored perceptions of remote nonfaculty employees of higher education institutions undergoing planned change.

The purpose of this study was to explore and understand university field representatives' perspectives as remote employees on the implementation of planned

change. The overarching research question that guided the study was the following: What are the perceptions and experiences of the university's field representatives regarding change, the mission, and their work during the implementation of planned change? The following supporting research questions were used:

- What organizational factors influence the implementation of planned change at the level of the university's field representatives?
- What team dynamics influence the implementation of planned change at the level of the university's field representatives?
- What leadership dynamics influence the implementation of planned change at the level of the university's field representatives?
- How do field representatives at the university experience planned change?
- How does the planned change process affect the organizational climate from the perspective of the university's field representative?

Review of the Literature

The literature review was conducted to determine how planned change might affect remote employees in a higher education setting. Because so little research is available on this topic, the review first focused on the history of remote employees and planned change in order to extrapolate the potential impact planned change may have on these employees. The search was conducted using the following databases: Academic Search Complete, Business Source Complete, Education Research Complete, ERIC (Education Research Information Center), Emerald Management Journals, and ProQuest.

The key words searched were *remote employees, planned change, organizational change, higher education, online learning, barriers to change, faculty, leadership, communication, and collaboration.*

Conceptual Framework

Planned change is employed to solve problems, reframe perceptions, improve performance, shape forthcoming innovation, and increase organizational effectiveness and efficiency (Cummings & Worley, 2009). Medley and Akan (2008) and Van de Ven and Sun (2011) emphasized the need for a structured process that includes accommodating social operations during change implementation. How planned change is initiated, managed, and implemented in organizations plays a central role in organizational research (Medley & Akan, 2008).

The theoretical frameworks used in this research were selected to help conceptualize the planned change process. The frameworks included systems theory; Tuckman and Jensen's theory of group dynamics and organizational change; Lewin's change theories (field theory, group dynamics, action research, and the three-step change model); and the Burke-Litwin organization change model.

Systems theory. Systems theory describes a framework for analyzing an organization, addresses how different organizational systems are affected during planned change, and analyzes why some systems are better at implementing change than others (Anderson, 2012). This theory also explains how change affects the organizational

environment, including its personnel, outside stakeholders, structure, and function (Anderson, 2012).

Systems theory provides a comprehensive overview of how change affects the organization as a whole by first taking into account how all of the systems, subsystems, and super systems interconnect and communicate (Anderson, 2012). Furthermore, the theory considers how well the framework of systems incorporates the diverse needs of stakeholders in building a healthy and sustainable organizational system. Caldwell (2012) stated that systems theory describes processes within an organization (system) that is open to change.

Modern systems theorists tend to view organizations as dynamic open systems, a view that is in opposition to the scientific management approach advocated by Frederick Winslow Taylor in the late 19th and early 20th centuries. In his bid for individual efficiency, Taylor (1911) studied and advocated for the control of variables that affected human production. Known as the father of scientific management, Taylor (1911) generally viewed the management processes from a closed-systems perspective.

Tuckman and Jensen. Tuckman and Jensen's group dynamics theory includes a five-stage group decision making model and predicts how individual group member behavior influences the group decision-making process (Tuckman & Jensen, 2010). During workplace change processes, this theory can serve as a leadership tool that predicts different stages of group formation and development (Tuckman & Jensen, 2010).

The model's five stages are forming, storming, norming, performing, and adjourning (Tuckman & Jensen, 2010). *Forming* is defined as becoming oriented to a task or group, or creating a set of interpersonal or group behaviors (Tuckman & Jensen, 2010). *Storming* describes group conflict or the emotional stage of group work and change (Tuckman & Jensen, 2010). *Norming* is defined as group cohesion that may develop immediately after a period of group conflict (Bonebright, 2009; Tuckman & Jensen, 2010). *Performing* is when the group or change becomes functional (Bonebright, 2009). Lastly, *adjourning* is described as the end of the change cycle or group work (Tuckman & Jensen, 2010). As per Bonebright (2009), Tuckman and Jensen's research was significant because it recognized the complexities of group dynamics when implementing planned change in organizations and it offered a model to help groups cope with change more effectively.

Kurt Lewin's change theories. Lewin's theory of change is composed of four sub theories that all have the underlying theme of planned change: field theory, group dynamics, action research, and the three-step change model. According to Lewin (as cited in Voelker, Wooten, & Mayfield, 2011), these interrelated theories span the entire change process and are applicable to individual, group, and organizational change.

Field theory. Field theory examines how different forces influence planned change among groups and individual group members (Gershwin, 1994). According to Burnes and Cooke (2013), field theory was developed to understand how groups are formed, socialized, and maintained. Burnes and Cooke further theorized that field theory

is the foundation for planned change. The environment in which planned change occurs is referred to as the *field*, and changes made within the field result in changes in the behavior of individual group members (Gerswhin, 1994). Introducing individuals to new behaviors or expectations launches an exchange of forces that drive toward the change while simultaneously opposing it. Simply put, field theory indicates that the behavior of individuals is a reaction to the environment, and the individual and the environment are interdependent variables (Gerswhin, 1994).

For example, in this study, the field representatives' behavior during the planned change process—including their interactions with each other and their leadership—can indicate the success of the change process. During planned change, such interactions increase or decrease; this, in turn, alters field representatives' behavior. Field theory suggests that forces influencing behaviors and interactions during change are measurable and identifiable (McGarry, Cashin, & Fowler, 2012). Thus, understanding employees' behavior during the change process enables leadership to define and address barriers to change.

Group dynamics. Lewin's three-step change model was developed to analyze and implement change from the perspective of organizational and group dynamics (Burnes, 2009). Burns (2004) argued that Lewin's three-step model was congruent with his group dynamics theory, which stressed that groups, not individuals, should be the focal point of change.

In group dynamics, collective group characteristics outweigh the needs and perspectives of individuals. Lewin (2008) stated that individuals isolated via physical, social, or emotional measures are more likely to be influenced by the group (McGarry et al., 2012). Change is more likely to occur at a group level than on an individual level. Group norms, interaction, and socialization influence change in group dynamics. This theory is applicable to the current study's focus: how university field representatives accept and execute planned change. Each representative is responsible for implementing change in his or her assigned territories. The university field team's collective response to change can influence individual representatives' performance during the change process. Thus, the effectiveness of change can be a reflection of group dynamics.

Action research. Action research purports that for individual change to be effective, the change must be predicated on the totality of group insight (Peters & Searby, 2012). Although action research was not the selected methodology for this study, it is still important to discuss its impacts on planned change initiatives. McGarry, Cashin, and Fowler (2012) described action research as a series of steps including planning action, taking action, and investigating the results of the action. Choi and Ruona (2011) asserted that action research recognizes that forces affecting a group also shape individual behavior. Accordingly, all group members need to participate and collaborate for change to take place and be effective. For the current study, this theory suggests that all university field representatives must participate in the planned change process in order for change to occur within the group.

Three-step change model. Lewin's three-step change model is based on the preparation, planning, and implementation of planned change initiatives (Sarayreh, Khudair, & Barakat, 2013). In order for planned change to be implemented successfully, Lewin contended that three steps must be completed: unfreezing, moving, and refreezing (Sarayreh et al., 2013).

Step 1, *unfreezing*, occurs when the complex forces that support current behaviors become destabilized, allowing new behavior to be adopted. Before change occurs, these forces need to be unfrozen (Sarayreh et al., 2013). No single intervention can produce unfreezing in all situations, as each case is different. Furthermore, unfreezing may involve addressing different behaviors.

Step 2, *moving*, refers to the environment in which new behavior is learned. Moving is the repetitive process of implementing change, but it neither predicts nor controls the outcome of the desired change (Sarayreh et al., 2013). Moving allows change to take place on group and individual levels.

Step 3, *refreezing*, establishes the desired behavior or change. During refreezing, the desired behaviors are confined within the entire group (McGarry et al., 2012). The change must be adopted by the entire group or there will be regression. Additionally, there may need to be some adjustments at the group level for change to be accepted into organizational norms and cultures (McGarry et al., 2012). Lewin theorized that group norms and culture must be transformed for planned change to be successful (Sarayreh et al., 2013).

Burke and Litwin's organizational change model. The foundation of Burke-Litwin's model is a cause-and-effect relationship (Martins & Coetzee, 2009). The cause is defined as the organization's conditions, and the effect is the resultant performance of change (Martins & Coetzee, 2009). Burke-Litwin's model links an organization's performance to its overall effectiveness in executing deliberate change. Additionally, the model may help in predicting how individuals and groups perform during planned change by examining how they investigate, plan, and manage change.

This model describes two stages of change: first-order (transactional) change and second-order (transformational) change. In first-order change, some features of an organization may change, but the fundamental core of organizational beliefs and mores remains the same (Anderson, 2012; Burke & Litwin, 1992). In second-order change, the entire organization fundamentally accepts the change and transforms itself qualitatively (Anderson, 2012; Burke & Litwin, 1992). Organizations that continually change and adapt meaningfully in their competitive environments are known as *learning organizations* (Vitkiene, 2013). In secondary change dynamics, organizational culture and climate are affected in positive ways. The Burke-Litwin model describes systemic procedures, management practices, and overall organizational structures necessary to achieve transformational change (Waclawski, 2002). When employee perceptions are positive, organizational climate tends to be positive. When employee perceptions are negative, the organizational climate tends to be negative as well (Yoder, 2004).

Planned Change

Ahearne, Lam, Mathieu, and Bolander (2012) stated that successful execution of planned change is a fundamental part of remaining competitive in modern business.

Implementing planned change can be far more complex and challenging than anticipated (Mitchell, 2013). Gilley, Godek, and Gilley (2009) found that there are many reasons why employees resist change, “including fear of the unknown, cultural conflict, fear of failure, and lack of reward” (pp. 5–6). Buono and Kerber (2010) described an organization’s “change readiness” (p. 4) in terms of a mental state that is focused on “employees’ beliefs, attitudes, and intentions” (p. 4). An important aspect of change readiness is recognizing the need for a planned change at a particular point in time.

Blomme (2012) stated that although planned change is the model used by organizations to accomplish change goals, it remains the managers’ role to successfully lead and implement change. Bouno and Kerber (2010) reported that managers have become more comfortable leading the planned change process. Additionally, leaders are getting better at foreseeing future changes and reacting to “external forces” during the planned change process (Bouno & Kerber, 2010, p. 5). Furthermore, successful implementation of planned change requires leaders to be open to “experimentation, improvisation, and the ability to cope with unanticipated consequences or repercussions” (Bouno & Kerber, 2010, p. 13). Managers view planned change objectively through an organizational perspective and manipulate the change process as they adapt it to an interpersonal hierarchy, a process that further objectifies change (Blomme, 2012). For

planned change to be implemented effectively, Burnes (2012) asserted that the leadership and the entire organization must share the same goals, values, and ethics during the entire change process. Historically, organizations that created healthy and ethical work environments were less likely to have barriers to planned change (Burnes, 2009).

Lewis, Laster, and Kulkarni (2013) reported that because change is naturally controversial, the way in which it is communicated is very important. Implementing change without informing remote employees of the need for and direction of change can further distance them from the organization's central mission and vision (Leslie, Park, & Mehng, 2012). In crisis mode, some administrators call face-to-face meetings, a practice that may further distance remote employees by adding to their work schedules (Dolan, 2011). Additionally, communication during planned change that is not well planned or is otherwise poorly conducted can increase anxiety among remote employees (Ye, 2012).

According to Perry and Pilati (2011), nearly 1.6 million students were enrolled in online courses in 2002. As of 2011, it was estimated that at least one third of all U.S. students had taken an online course (Perry & Pilati, 2011). Accompanying the increase in postsecondary online learning, higher education institutions have adopted alternative work schedules, such as allowing faculty and staff to telecommute. Such practices help to align institutions with changing learning practices, increase faculty and staff's accessibility to students, and decrease overhead costs (Weyant & Palmer, 2012).

Leslie et al. (2012) found that employees who telecommuted had more positive work outcomes and higher productivity rates. However, the same research also reported

that telecommuting employees had a harder time forming alliances with superiors and had a lower level of commitment to their organization, especially during the change process. Dolan (2011) reported that faculty members who teach remotely can increase their motivation and commitment to their students and the organization by periodically meeting face to face with administrators and colleagues. Taskin and Bridoux (2010) found that managers must find ways to connect remote employees with the organization during planned change. Managers can do this by scheduling face-to-face meetings with remote employees, soliciting their feedback regarding the proposed changes, and making them aware of changes affecting their department in a timely manner.

During times of planned change, Ye (2012) found that employees might lack guidelines and procedures for communicating with leadership, a situation that can exacerbate misunderstandings and anxiety. Other researchers postulated that employees who telecommute have less access to networks for building social relationships or allegiances, and therefore depend more directly on superiors for communication during planned change (Taskin & Bridoux, 2010). Lewis, Laster, and Kulkarni (2013) stated that how change is communicated influences how it is perceived. Furthermore, Soonsawad (2010) found that organizational communication is the primary method used to create team synergy and facilitate awareness of new goals and strategies during planned change. However, as Taskin and Bridoux (2010) noted, the transfer of information often gets lost or misinterpreted when transmitted from department to department or manager to employee. The latter finding further illustrates the need for congruent and consistent

communication by a variety of means in order for planned change to be effective, especially among remote employees.

Informal Power

The organizational change process is intended to modify policies, behaviors, and goals. Leadership may look to employees who are highly respected due to their performance, reputation, or social relationships within the organization to help facilitate planned change (Battilana & Casciaro, 2010). Informal power, as described by Orgambidez-Ramos and Borrego-Alés (2014), is characterized by positive relationships among superiors, peers, and subordinates that result in political or social alliances. Positive relationships in the workplace are important because employees with informal power frequently help their peers become more effective and productive.

Informal power may be used to encourage employees to overcome resistance to change and promote the adaptation of new behaviors, practices, and policies (Battilana & Casciaro, 2010). Informal power creates informal communications channels with peers, leadership, and across teams (Orgambidez-Ramos & Borrego-Alés, 2014) that can contribute to the vetting and implementation of planned change for geographically disbursed workers. Informal power may help overcome resistance to change by transforming employee attitudes and encouraging them to embrace new ideas and policies (Battilana & Casciaro, 2010). To the extent that remote employees are able to develop positive relationships with peers and leaders, informal power could play an important role in facilitating planned change in geographically widespread work centers.

Resistance to Planned Change

Employee resistance to change is a significant obstacle in planned change. Change affects employees' thinking, behavior, and perceptions. Resistance to change can cause employee skepticism, which can spread throughout departments (Bell & Barkhuizen, 2011). Employees may not resist the change itself, but the ideas surrounding the change or the way change is being executed (Fischer & Rohde, 2013). Without engaged and committed employees, planned change is likely to fail.

Barton and Ambrosini (2013) noted that planned change is unsuccessful when individual employees either do not commit to or resist changing their behavior and adopting the new strategy. The biggest reason for resistance to change is leadership's management of the change process that contributes to increased stress, workload, job insecurity, and lack of employee engagement (Bell & Barkhuizen, 2011). These negative effects can happen when leadership lacks a clear strategy to implement the steps to make planned change successful (Barton & Ambrosini, 2013).

Based on Hultman's (1995) research, Rosenberg and Mosca (2011) described two types of resistance to change: active and passive resistance. In active resistance, employees are openly critical of the planned change (Hultman, 1995; Rosenberg & Mosca, 2011). In passive resistance, employees openly support the planned change but decline to implement it (Hultman 1995; Rosenberg & Mosca, 2011). Brunninge (2009) stated that an organization's history is a critical part of the change strategy process and can act as a barrier to change. Brunninge (2009) also theorized that organizational

patterns can and do influence change processes. Based on this line of research, measures promoting a positive organizational culture could encourage communication that would be beneficial the implementation of planned change initiatives.

Remote Employees

Madsen (as cited in Joice, 1999) defined remote employment as an arrangement in which employees work from an alternative workplace setting during paid hours. As technology evolved, accessibility through mobile devices superseded having physical presences in an office. Technology and widespread internet accessibility makes many workplaces accessible almost anytime and anywhere.

Prevalence. The Department of Labor estimated that remote employees comprise up to thirty percent of the work force (Mello, 2007). Advances in technology and communication have contributed to the rise of the teleworker in higher education (Ally, Cleveland-Innes, & Wiseman, 2010) where as many as fifty percent of employees work virtually (Kanuka, Jugdev, Heller, & West, 2008).

Benefits. There are many benefits to working remotely including increased overall employee productivity and the ability to offer flexible work schedules. Working remotely also has social, environmental, and cultural benefits (Mello, 2007). Clark, Karau, and Michalisin (2012) found that remote employees have a strong sense of job satisfaction and commitment to the organization. Fonner (2012) noted that employees who worked remotely had more meaningful family interactions.

Issues. In addition to its benefits, working remotely also presents unique challenges. Shriberg (2009) and Morganson et al. (2010) found that communication is essential for virtual employees to remain connected to the organization. Conversely, Fonner (2012) reported that excessive communication also could increase these employees' feelings of stress and detachedness. Noonan and Glass (2012) reported that remote employees often felt that excessive communications interrupted their daily tasks. Fonner (2011) noted that remote employees often blurred boundaries between work and family. Morganson et al., (2010) reported that many remote employees felt a strong sense of isolation. Additionally, perceiving a lack support during the change process led some remote employees feeling isolated from their organizations and reduce their participation in corporate culture (Morganson et al., 2010). Furthermore, a perceived lack of interactions between coworkers and management can reduce an employee's productivity and willingness to perform their job functions adequately (Morganson et al., 2010).

Virtual teams. With the growth in the number of employees working remotely, researchers are examining ways to effectively lead and manage virtual teams (Shriberg, 2009). Shriberg (2009) reported that the main challenge of working with remote teams was lack of cohesion among the group and within the organization. It is critical that remote team members clearly understand expectations and have a foundation that highlights planned change milestones (Quiros, 2012). Remote teams need support systems that sustain team synergy and foster communication and collaboration (Ally et al., 2010; Shriberg, 2009). Without such support systems, remote teams run the risk of

becoming unmanageable (Morganson et al., 2010). Quiros (2012) stated that building a personal relationship between remote employees and their direct managers increases trust and openness, which can lead to increased communication and team identity.

The literature demonstrates the varying ways remote employees affect the implementation of planned change. In order for planned change to be successful, these employees must be engaged in the change process and supported. Because remote employees face geographical obstacles to participating in change processes, managers should look for ways to include them by inviting them meetings or eliciting their feedback. Such strategies could help increase remote employee engagement, commitment to change, and overall productivity.

Implications

The purpose of this study was to explore how planned change is experienced by a sample of remote university employees (field representatives) whose geographical location may prohibit them from actively participating in change process. Specifically, this study examined the barriers implementing planned change experienced by these field representatives as they completed their functions remotely.

The study also was conducted to develop suggestions to support these employees more effectively during future planned change including finding strategies with the potential to lessen remote employees' anxiety and increase communication and collaboration among departments. Because all employees face planned change, this study has implications not only for field representatives of higher education institutions, but

also for remote employees in other industries. It was the goal of this study to define challenges remote employees face working in an ever-changing higher education setting, and share my findings in a white paper which includes a policy statement with the stakeholders, who include university and department leadership. Additional projects considered for my study included development of change management workshops, development of an internal employee change implementation committee, planning and implementation of planned change employee summits, and establishment of online employee network to announce, monitor, and include all employees in planned change.

Summary

Higher education institutions are facing two developments that will require them to make significant changes. First, to take advantage of the popularity of online education, institutions must examine ways to attract and meet the needs of online student populations. Second, to decrease costs and enroll/retain students from all over the U.S., institutions face the prospect of hiring and retaining an increasing number of telecommuting employees. During planned change processes, higher education institutions and their leadership are tasked with creating cultures that actively include telecommuting employees. Leadership and colleague support are important aspects of the remote environment, especially during periods of planned change, which represent a paradigm-shift from traditionally held on campus positions. The study population is a tenured team consisting of members who all telecommute.

Section 1 corroborated the lack of scholarly research about the changing landscape of higher education, the explosion of for-profit institutions, and the mobility of

their talent. Qualitative inquiry explored planned change and remote employees seeking to understand the impact on productivity, the organization, leadership, and the individual employee. The literature review and synthesis demonstrated the importance of this inquiry by the lack of available research on remote nonfaculty employees working in higher education. The methodology chosen was realist ethnography because it connected the theoretical frameworks to the project study through the research design, data collection, and analysis. The research literature highlighted experiences and complications impacting remote employees, especially when understanding and implementing organizational change.

Section 2 considers the qualitative methodology of ethnography as the research approach used to collect and analyze data of three different populations of employees. Interviews and focus groups were used to collect data and the thematic results indicated the need for a white paper, which is discussed in Section 3 and presented as a stand-alone project in Appendix A. Section 4 presents a discussion of the learning and scholarly development I experienced as a result of my capstone research.

Section 2: Methodology

This section describes the research design used to investigate patterns and themes that emerged from field representatives' shared experiences and perceptions during planned change processes. The sample from this ethnographic qualitative research study included 13 remote employees ($N = 13$) selected from a population that included field representatives, regional managers, and one vice president (VP). The purpose of this study was to explore and understand the implementation of planned change from the perspective of field representatives who were remote employees of a higher education institution. As members of the same employee group (Merriam, 2009), remote employees often perform the same mission and, through their responsibilities, share many beliefs, practices, and behaviors related to their work with other remote employees (LeCompte & Goetz, 1982). In this research, I sought to describe the unique subsystem (Anderson, 2012) of field representatives, including their interdepartmental interactions and communications with each other and their leadership. Based on the study setting and desire to understand the planned change process as experienced by a particular group of people, ethnography was the most appropriate methodology for this research (Brewer, 2005). Ethnographic research is a qualitative method used to describe the everyday life and practices of individuals from the same group; in this case, the group was remote employees (Brewer, 2005).

Qualitative Research Design and Approach

Ethnographic research is used to describe a group or a culture (Sangasubana, 2011). Additionally, LeCompte and Goetz (1982) noted that ethnographic research is a suitable method for analyzing, reconstructing, and describing groups of people who share experiences, practices, or behaviors, as was the case with the remote employees at the university selected for this study. Merriam (2009) added that, while there are many forms of ethnographic research, the common thread among the forms is that each describes the culture, attitudes, beliefs, and values of individuals or groups. These common threads were of primary interest in exploring and understanding planned change for these remote employees.

Description of Qualitative Tradition

Ethnography was developed by anthropologist Bronislaw Malinowski in 1915 to analyze and describe human behavior and culture (Maybin, 2003). The purpose of ethnographic studies is to understand an issue or problem affecting small or large groups of individuals (Glesne, 2011). To understand shared norms, ethnographic researchers analyze and interpret shared beliefs using fieldwork, interviews, and documents. Additionally, researchers employ ethnography to gain insight into group members' perceptions and experiences (Creswell, 2012).

Subcategories of ethnography all have similar characteristics but vary in their research agendas (Creswell, 2012). Ethnography subcategories include realist, case study, confessional, life history, auto, micro, feminist, postmodern, ethnographic novel, and

critical ethnography (Creswell, 2012). The three ethnography types considered for this study— case study, critical, and realist ethnography—each explore cultural themes and a shared pattern or belief among participants. In each of these three types of ethnography, fieldwork is used to uncover themes and participant perceptions, and researcher objectivity is required to interpret findings accurately.

Case study ethnography describes a program, event, or activity from individuals' points of view rather than from the perspective of the collective group (Baskarada, 2014). Case studies focus on examining interactions among individuals in a group to uncover patterns and gain insight into a larger problem (Baskarada, 2014). Case study was considered for this project study because it examined a single theme with the purpose of understanding similar themes within a delimited period. In critical ethnography, the role of the researcher is politically motivated: to advocate for changes in a group that is depreciated or devalued in society (Barron, 2012). Sealey (2007) defined *realist ethnography* as the study of the perceived realities of an individual or group, which are described through their personal experiences. Realist ethnography usually explores a particular situation objectively by examining individuals' or groups' experiences of it (Sealey, 2007) and reports the experiences using a third-person point of view (Creswell, 2012).

The conceptual framework I chose for this study, realist ethnography, allowed me to examine the subculture and perceptions of field representatives as remote employees and detect shared patterns and themes based on their experiences. As highlighted in the

preceding literature review, as a group, field representatives and remote employees share an employment experience that integrates with their private lives in ways that are unlike the work experiences of conventional employees. Ethnography enabled me to interview participants during a series of interactions. I analyzed data I gathered from these interviews to uncover themes and patterns.

Justification of Research Method

I am a remote employee of the university, and as such, I have access to and routinely interact with my colleagues and leaders. Realist ethnography was selected for this study because it allowed me to analyze the field representatives' subculture and delve into their beliefs and practices during planned change processes.

Several approaches were considered and ruled out for this study: case study, critical ethnography, grounded theory, and phenomenological research. Case study ethnography was not appropriate because it focuses on events or activities involving individuals rather than groups (Walford, 2001). Critical ethnography was not suitable because this study did not examine social and political forces that influence groups (S. Allen, Chapman, Francis, & O'Connor, 2008).

Grounded theory design uses systematic processes for data collection and the identification of categories and themes to form a theory that helps in explaining a phenomenon (Creswell, 2012). This methodology generally is used when existing research does not address the problem (Creswell, 2012). Because I was not looking to generate an explanation or theory about planned change and remote employees, and

because there were existing theories applicable to this topic, grounded theory design did not fit the needs of this study well (Creswell, 2012).

Phenomenological research is designed to study individuals' perspectives and views of reality (Lodico et al., 2010) in order to capture the "human experience" (Lodico, Spaulding, & Voetgle, 2010, p. 270). In phenomenological research, data are collected through interviews and participant observations, are reflected upon, and are analyzed over an extended period of time (Creswell, 2012; Lodico et al., 2010). Although a phenomenological approach was considered for this study, it was not appropriate because the period for this study was delimited.

Realist ethnography was employed to analyze interconnections and patterns of the subculture of field representatives within the culture of the university. The remainder of this section presents the study's research design, study participants and sample, data collection, and analysis. Ethics and study limitations are also discussed.

Participants

The study population consisted of 20 remote field representatives, three regional managers, and one field team VP. The study participants were a purposeful sample of 13 representatives from the available population.

Selection Criteria and Process

The participants for the study were all part of a university field team that included field representatives, managers, and the field team VP. Participant characteristics varied by employment demographics (Doody, Slevin, & Taggert, 2012). The tenure of

individual field representatives ranged from just a few months to more than 10 years. To be considered for participation, candidates had to have been field team members at the university for a minimum of 9 months. This participation requirement was designed to ensure that all participants completed initial training, were familiar with their job requirements, understood the expectations of remote employees, and were experienced with using the university's internal communication channels.

Even when using purposive sampling for qualitative research, it is important to develop and use a participant selection strategy that is designed to increase study validity and reliability (LeCompte & Goetz, 1982). Therefore, additional criteria were designed to guide the selection of field team representatives who would be invited to participate in the study. The characteristics of the final sample were as follows:

- 100% of participants worked remotely within the United States.
- 100% of participants were over age 18.
- 36% of participants were male.
- 64% of participants were female.
- 48% of participants had been field team members for 5 years or longer.
- 26% of participants had been field team members for more than 1 year but less than 5 years.
- 66% of participants were female regional managers.
- 33% of participants were male regional managers.

Twenty-three potential participants met the eligibility requirements. Participation in the study was voluntary. Participants were required to be willing to contribute their knowledge and expertise freely during semi structured group interviews (referred to as focus groups) and individual interviews. Each focus group included three to five field team members. To address change management ideas for remote employees, a separate focus group was conducted with only the three managers. The VP for the remote employees was interviewed separately and did not participate in a focus group. Approximately half of the eligible representatives were involved in the study.

I began the participant selection process by obtaining permission to conduct this study from the VP of the field team members, as well as the human resources department. Prior to sending participant invitations, I also obtained permission from the university's Institutional Review Board (IRB approval #04-29-15-0086844). Once permission had been granted, participation invitations were sent to eligible field team members in the form of a Microsoft Outlook meeting invitation with the consent form attached. Potential participants had the option to accept or decline the meeting invitation.

Researcher-Participant Relationship

The majority of project participants had been employed as university field representatives since December 2011. All participants, therefore, had experienced planned change within their department. Furthermore, 69% of the representatives had been in their current position for 3 or more years.

I brought to the role of primary researcher my experience as a university employee who, since 2007, had been on the field team and participated in conference calls and face-to-face meetings with the study participants. Therefore, I had established professional relationships with the study participants before the study originated. I did not have any authority over, or responsibility to lead, appraise, or grade the participants in any capacity. The participant-researcher relationship was explained fully to participants during the informed consent process.

Ethical Protections

The identity of study participants was kept confidential. To ensure that they were aware of the potential risks of study participation (Glesne, 2011), all participants signed an IRB-approved informed consent form. The form assured participants that their involvement in the study was strictly voluntary and that they had the right to cease participation at any point without fear of any reprisal (Creswell, 2012). In preparation for conducting this study, I completed the National Institutes of Health (NIH) online training for the protection of human participants (see Appendix B). I stored and safeguarded all study data on my personal computer, which was password protected and accessible only by me.

Data Collection

Informed consent was obtained from all study participants prior to the start of data collection. Data collection involved both focus groups and individual interviews conducted via electronic communications methods (including telephone conference

calls), which mirrored the ways that field team members routinely communicated with one another (Shover, 2012). The data collection methods used were semi structured individual, focus group, and key informant interviews.

The purpose of the study was to explore the implementation of planned change from the perspectives of the university field team members. In doing so, I addressed each research question by examining how participants perceived specific factors identified in the literature as contributing to the implementation of change processes for these remote employees. The interview factors included social and team dynamics, communication, and internal supports. The exploration of anxiety and stress experienced by field team members during planned change was incorporated as a study goal in order to personalize the study of planned change for this unique population. Types of data collected were focus group, individual, and key informant interview data from interviews with field representatives, managers, and the VP.

Data Collection Methods

The realist ethnography approach provides flexibility by accommodating unanticipated changes during the data collection process (Brewer, 2005). The primary objective of ethnography is to understand participants in their setting. Usually, data are collected using participant observation, interviews, personal documents, and natural language. However, because all potential participants worked remotely and autonomously in the field, participant observation was contraindicated for this study. In addition, personal documents were unavailable for review due to confidentiality

concerns. I collected data using interviews (see the interview plan in Appendix B) during which participants discussed “behaviors, meanings, attitudes, and feelings” they had experienced (Brewer, 2005, p. 63). Based on Brewer’s guidance, I determined that these categories of data would best facilitate an understanding of planned change from the remote employees’ points of view.

Participants were invited to contribute in individual and group interviews, also known as focus groups (Merriam, 2009). Lambert and Loisel (2008) concluded that combining focus groups and individual interviews produced a deeper understanding of participants’ experiences.

I was aware of the many crucial responsibilities that researchers take on when conducting studies. They are accountable for safeguarding participants, reporting and interpreting the findings truthfully and accurately (Brewer, 2005), and maintaining the integrity of the project and the findings. Furthermore, researchers are tasked with protecting participants’ rights and privacy while balancing any conflicts of interest that arise during the interview process. Therefore, I engaged in the following strategies to protect the participants and the integrity of the study. Prior to the interviews, I reminded participants that all identities and data would be kept confidential, that their participation was voluntary, that they could end their participation at any time, and that they could decline to respond to any question. All participants were informed that the interview was being recorded as soon as they logged into their interview. Participants were asked to acknowledge verbally that they understood their protections and were comfortable

moving forward with the focus groups and individual interviews. Recording the interviews of persons who understand fully the participant protections put in place by the researcher helps to ensure the reliability and validity of interview data (Dilshad & Latif, 2013).

Focus groups. Morgan (1996) defined a focus group as a research technique that uses active group discussions and interactions as the data source. Three focus groups were conducted for this study, each consisting of three to five field representatives, with one including only managers. These small groups were designed to elicit participation from all interviewees while enabling me to control the group during the interviews (Creswell, 2012). There were four predetermined focus groups for field representatives, which took place before and after the work hours. All potential participants were emailed the focus group schedule once they returned their signed informed consent form. Participants were asked to select a meeting from the schedule. Once participants had selected a meeting, they received a confirmation email with a login code for the conference call. Upon return of their informed consent forms, managers were provided three meeting options at times that did not interfere with the workday. Once managers selected a meeting, they received a confirmation email with a login code for the conference call. The VP was interviewed during a call that was separate from all of the other participants.

Focus groups were conducted over conference calls, recorded for note taking, and analyzed for tone of voice and hesitancy to answer questions (Merriam, 2009). To inspire

discussion, group participants were given pre-determined topics with key phrases and themes before the interviews. During the focus groups, I acted as a facilitator or moderator to encourage the groups to engage in an active discussion, not a question-and-answer session (Glesne, 2011). Fortunately, the field representatives who participated in the focus groups have a strong rapport, which helped produce honest, lively discussions. I identified patterns of perceptions or shared themes among the groups (Creswell, 2012) during the interviews.

Glesne (2009) noted that, because qualitative research data rely on participant interpretation, each participant contributes his or her own perspective of events. Furthermore, because validity is an interpretation of reality, it has to be assessed in the context of its relationship to participants' experiences and circumstances (Creswell, 2012; Glesne, 2009). Therefore, I determined the most effective way to address the internal validity of the focus groups was to conduct individual, one-on-one interviews with each member following the group interviews (Creswell, 2012), a procedure that was approved by the IRB.

Individual interviews. Individual interviews are a favored method of conducting educational research (Creswell, 2012) and considered one of the most accurate ways to collect data (Sangasubana, 2011). Informal participant interviews are common in ethnographic studies (Lambert & Loiselle, 2008). Because this study's participants were remote employees, interviews were scheduled according to each participant's availability approximately one week after focus groups were conducted. Topics for individual

interviews were developed based on the data collected during focus groups. The semi structured interview questions corresponded to the study's five research questions. Distinct from focus groups, individual interview questions were designed to elicit individual (not group) perceptions of planned change. Individual interview questions were focused on delving deeper into the individual experience in order to uncover patterns and themes expressed by field representatives who have undergone planned change. I worked to remain neutral during individual interviews and not let my personal perceptions skew the interview or data collection process.

Individual interview participants were asked to communicate with me using Skype or a live meeting so that their body language and facial expressions could be observed. However, the majority of participants were unable to access Skype due to restrictions on their computers' webcams. Therefore, participants used the same conference call line that was used for the focus groups. Recorded interviews were downloaded directly to the password-protected computer used in the study. I took detailed notes of the conversations and participants' tones in order to compare and contrast focus group and individual perceptions. All participants' identities were kept confidential. Instead of using names to analyze the collected data, each participant was assigned a letter that corresponded to their team. Letters were used to track the participant for both the group and individual interviews.

Key informant interviews. Traditionally, key informants have a unique understanding of the situation and are able to provide pivotal information (Lodico et al.,

2010). After the individual interviews, two participants were asked to serve as key informants (by taking part in a series of individual interviews) based on their in-depth knowledge, understanding, and experience with planned change as experienced by field representatives. One key informant had a long history in the current position and held multiple roles within the university. While the second key informant had not worked at the university as long as the first, this participant has experienced planned change as a remote employee in another higher education institution. Following initial data collection, I participated in informal conversations with key informants to ensure I captured the voice of the field representatives accurately and help validate data through triangulation.

Data Collection Activities and Duration

Participants took part in one focus group and one individual interview, except the VP who did not participate in a focus group. The regional managers had their own focus group. Following the individual interviews, two key informant interviews were conducted. Each data collection activity (focus groups, and individual and key informant interviews) was scheduled to last one hour.

This study's interview plan is included in Appendix B. Data collection activities were conducted via conference calls that took place in August 2015. A private conference call function, which required a code known only to me, was used to record the interviews. Recorded conference calls were downloaded onto my computer as encrypted, password-protected files. Written, verbatim transcripts of all focus groups and interviews were generated from the audio recordings.

Gathering and recording data. Remote employees work autonomously at geographically dispersed locations, making field observations impractical. The interview protocol mimicked the interactions that the university field representatives experience with other university employees. The interview questions were developed to elicit answers that could help me understand and record field representatives' experiences, opinions, values, and behaviors individually and as a collected group (Glesne, 2011).

Interviews for data collection can be formal, unstructured, or semi structured. According to Lambert and Loiselle (2008), formal interviews are standardized and use uniform, closed questions that do not allow for deviation. To avoid formality, researchers conducting unstructured interviews use a list of topics to be addressed instead of asking predetermined questions (Glesne, 2011). A semi structured interview uses elements of both formal and unstructured interviews (Creswell, 2012). For this study, I used semi structured interviews and created an interview plan for both the focus groups and individual interviews (see Appendix B). At the beginning of each interview, participants were given a definition and three examples of planned change. I also used presupposition questions to build trust with the interviewees. All interviews were conducted over the phone. I had participants log into a conference call number with a special access code that allowed the call to be recorded. I also took notes during interviews using an electronic notepad.

Tracking and evaluating data. I used an electronic notepad to track my observations, initial perceptions, interpretations, and reflections during data collection.

Notes from the electronic notepad were transcribed into ATLAS.ti 7 for cataloging. This software coded and organized the data, and tracked underlying conceptual themes.

Role of the researcher. In this study, my role was to collect and analyze data (Brewer, 2005), which included serving as an observer and facilitator during participant interviews. I have a pre-existing, nonsupervisory professional relationship with the participants, and had to balance my two roles: field team member, and serious researcher. I perceived no changes in my relationships with the participants while conducting this study (Creswell, 2012).

Data Analysis

This section describes the data analysis plan I used in this study, including when and how the data were analyzed, the selection of analysis software, coding procedures, and the steps taken to ensure the quality, accuracy, and credibility of findings.

Data Analysis Timeline and Procedures

Data were collected and analyzed using ATLAS.ti 7 software. Data analysis was a continuous process that took place simultaneously with data collection (Brewer, 2005). Data were analyzed to observe field representatives' shared experiences and perceptions to generate patterns and descriptive units.

I coded the data by noting descriptive words and phrases. Word searches through the collected data also were conducted to help identify patterns and themes. Once all data were fully coded, content analysis began. Content analysis focused on finding meanings

of planned change that were either convergent or divergent among the remote employee participants. Most shared patterns and themes were complimentary rather than divergent.

Quality, Accuracy, and Credibility

Triangulation is a data validation technique that involves verifying data from two or more sources. Implementing triangulation, data obtained from one method can be corroborated with data from another method (Lambert & Loiselle, 2008). Data triangulation is common in ethnography; in fact, it is rare for only one data collection method to be used in this type of research (Brewer, 2005). Gathering data from both focus groups and individual interviews is a form of data triangulation that can provide a deeper understanding of participants' experiences (Lambert & Loiselle, 2008). Data triangulation was used in this study not only to increase the validity of the data, but also as a way to collect more reliable data. Key informant interviews also were used to drill deeper into the data to verify understanding and derive deeper meanings. My research committee chair oversaw my data collection and analyses, monitoring the process for the presence of researcher bias that could adversely affect data collection, analyses, or results, and provided suggestions for remedies where needed.

Procedures for Dealing with Discrepant Cases

It is advisable for researchers to establish a basis for detecting and handling discrepant data, including the evidence such data provide for or against the findings. Addressing discrepant data increases the findings' validity (Creswell, 2012). For this study, the data from all sources—field notes, focus group and individual interviews, and

key informant statements—were compared to identify any suspected discrepant data. Discrepant cases were analyzed to provide new insights in atypical responses during focus group and individual interviews (Morrow, 2005).

An examination of discrepant data was essential to root out conformity bias (Freeman, deMarrais, Preissle, Roulston, & St. Pierre, 2007). Discrepant data identified in this study were analyzed to provide new perspectives and themes. The geographical location of the remote employee was identified as a factor contributing to discrepant data. For example, participants who work within a two-hour drive from the university headquarters have a different experience as a remote employee than do field representatives located in California or Florida. I took three steps to ensure quality with respect to discrepant data.

1. I listened to the interview recording, reviewed the interview transcripts, and compared them for accuracy.

2. Subsequently, I compared my interview notes to the interview transcripts to ensure I captured each participant's intention and meaning. If there was a question of accuracy, I repeated the first step.

3. I categorized interview keywords and themes. Additionally, discrepant data were given a separate category to be re-analyzed for additional discernments.

Using these three steps helped ensure that I addressed discrepant data and avoided over simplistic interpretation of participant responses (Freeman et al., 2007). Where

discrepant cases were judged valid, the divergent views increased the depth and interest in thematic analysis.

Limitations

The complexities of conducting ethnographic research comprise both strengths and limitations. Recognized as social research, ethnography (Brewer, 2005) not only considers participant responses but also social cues and interactions between participants in group settings when appropriate. LeCompte and Goetz (1982) discussed the lack of adherence to reliability and validity in participant observation and analysis. Participant interviews and data analysis are considered subjective. There is no guarantee data analysis could be replicated in a similar setting, which is the basis of research reliability (LeCompte & Goetz, 1982). In this study, I attempted to control for this limitation through data triangulation (Creswell, 2012). Ethnography produces rich descriptions (Brewer, 2005) which may not carry over into other types of research methods. Participant responses are captured in a period of time and can be influenced by a variety of factors.

A second limitation derived from the researcher-participant relationships. The researcher and participants had a professional relationship that in some instances spanned over ten years. Participant relationships and status within the group and the expected behavior roles could interfere with accurate data collection. As data were being collected through interviews, participants' responses may be consciously or unconsciously influenced by the dyadic relationships with the researcher (LeCompte & Goetz, 1982). I

controlled for this possible limitation by adhering strictly to the approved interview protocol.

Data Analysis Results

This section provides an overview of the study's data analysis, which includes descriptions of procedures as well as how the data were organized, themes developed, and data codes defined. Next, I present the themes and findings uncovered during focus groups and individual interviews with field representatives and remote managers, as well as the interview with the VP. This section concludes with a discussion of the overall study findings.

Data Analysis Overview

Qualitative data analysis was used for this study. Data collection was achieved using focus groups, as well as individual and key informant interviews over a five-week period. Potential participants were initially sent an email invitation to participate in the study that included a participant consent form. Upon receipt of the signed consent form, focus groups were scheduled. Individual and key informant interviews were scheduled at the conclusion of the focus groups.

The interview protocol mimicked interactions between university representatives, direct managers, and executive leadership (Glesne, 2011). The guiding research questions were used to gain insight to the perceptions and experiences of university field representatives as remote employees. Brewer (2005) stated, "focus group interviews elicit verbal descriptions of behaviors, attitudes, and feelings of participants" (p. 64). The

combination of focus group and individual interviews provided deeper insights into participants' experiences and perceptions of their role as remote employees undergoing planned change (Lambert & Loisel, 2008).

The semi structured interviews were guided by an IRB-vetted list of predetermined topics and guiding questions (see Appendix B). The semi structured interview format was used to encourage discussion that would allow shared patterns and themes to emerge (Creswell, 2012). Interview questions were sufficiently open-ended to prevent them from limiting conversations or participant responses (Srivastava & Thomson, 2009). The primary topics were organized into the following seven areas of inquiry based on the five research questions:

1. Factors contributing to the implementation of planned change (RQ1),
2. Team dynamics during planned change (RQ2),
3. Leadership dynamics during planned change (RQ3),
4. Internal and external support received during planned change (RQ4),
5. The impact of organizational culture during planned change (RQ5),
6. The effects of stress and anxiety on remote employees during planned change (RQ4 & RQ5), and
7. Remote employees' self-perceptions during planned change (RQ4 & RQ5).

As interviews progressed, additional questions were developed based on participant experiences and perceptions. These additional questions enabled a deeper level of inquiry and understanding of the participant experiences during planned change.

All interviews commenced with me giving an introductory statement about confidentiality, voluntary participation, and the recording of interviews. Participants were asked if they understood what they were told and consented to being recorded. Participants confirmed their voluntary participation and were reminded of their right to not answer any question or withdraw from the study at any time. To provide context, I explained the purpose of the study and provided a definition and three examples of planned change (Appendix B).

There were 27 potential participants consisting of 23 field representatives, three managers, and one VP. During data collection, three potential participants became unavailable due to changes in their work status. Of the remaining 20 potential participants field representatives, 10 participated in this study. Two managers and the VP also participated in the study. The total number of participants was 13. The characteristics of the participants were as follows:

- 100% of participants work remotely within the United States.
- 39% of participants were male.
- 61% of participants were female.
- 62% of participants were a member of the field team for five years or more.
- 38% of participants were a member of the field team for more than one year but less than five years.
- 50% of regional managers were female.
- 50% of regional managers were male.

Procedures. All focus groups and individual interviews were recorded using a private conference call service. Participants were given a private conference call number and access code. Recorded interviews were downloaded to a password protected computer. The conference call service professionally transcribed and provided a list of key words for each interview. Transcriptions, key words, and recordings were uploaded into ATLAS.ti7 software and then coded for themes.

Field notes were taken electronically and kept in a password protected file. At the beginning of each interview, a new document was created and dated with the date and time of the interview. At the conclusion of each interview, notes were transferred into ATLAS.ti 7 software for coding.

To protect participants' identity, four safeguards were applied to the transcribed files. First, each interview and set of field notes were labeled by date and time. Second, all references to individual's identities during interviews were removed and replaced with label codes created by sequential numbers for each participant. Third, participant identifications were further labeled by region and level of responsibility within the organization. Fourth, once coded as described above, these complex participant codes were recoded simply as P1 through P13. Manager participants were coded PM. Fifth, all participant demographic information was removed except gender and tenure. Gender and tenure were not used to describe participants, but used where helpful to inform the overall theme. Finally, all recordings, field notes, and transcriptions were kept on a personal, password protected computer.

Organizing the data. I used the two-step data management process described by Brewer (2005) to organize the data into manageable units or segments of meaningful narratives. In the first step of this process, data were coded into index categories and themes. In the second step, open codes were developed during the analysis of initial codes. To ensure consistency and accuracy during categorization and coding, I reviewed the data several times. ATLAS.ti 7 software allowed each piece of datum to be labeled with specific, relevant codes that were developed using keywords from interviews. I then examined the relationships between the codes.

I identified patterns by cross referencing the codes. During this process, I was able to establish relationships between codes and occasionally generated additional relevant codes. This repetitive process allowed me to create thorough descriptions of the data represented by each code. For example, datum unit FR2080120158 (P9) stated, “planned change has made the team grow closer; the team is more likely to reach out to one another for assistance.” The first part of this comment was coded for team dynamics and the second part was coded for organizational factors influencing collaboration. Additionally, the entire response was referenced to an open code relating to a positive organizational subculture of remote employees undergoing planned change. This method of analysis continued until all data were coded and thoroughly analyzed for emergent themes.

Developing themes. Themes were clustered together by the contextual relationships of participant responses. The relationship between each set of themes was

then explored for remote employees, including field representatives, managers, and the VP, while looking for themes related to planned change. The following 11 themes emerged from the data analysis (#4 [change management] was identified by the managers and VP only and #11 [tenure] was identified by only field representatives):

- | | |
|--|----------------------------|
| 1. administrative tasks and deadlines, | 7. leadership, |
| 2. affect, | 8. organizational culture, |
| 3. buy-in, | 9. process change, |
| 4. change management, | 10. team dynamics, |
| 5. collaboration, | 11. tenure. |
| 6. communication, | |

The relationship of each theme to planned change and remote employees was analyzed independently. As themes for planned change and remote employees emerged, I searched for patterns within the data to explain the relationships among the codes. Analyzing the patterns required that categories of codes be compared to identify classifiable themes. Connections between planned change and remote employee's theme categories were identified to compare the patterns interchangeably. Using this repetitive process, I classified participant responses according to one of three main categories: (a) planned change, (b) remote employee, and (c) remote employee perceptions of planned change.

When discussing perceptions of remote employees who have experienced planned change in a higher education setting, participants' responses included specific examples

of change that fit within each of the identified codes. In turn, these examples of change helped me interconnect codes with both planned change and remote employee experiences. Thus, the themes were reinforced and continued to crystalize throughout the analysis process.

Defining the themes. Definitions were useful for deriving a common understanding of the constructs that emerged through the data analysis. The following definitions, presented in alphabetical order, were explored to help formulate a shared understanding of the meanings expressed by the participants regarding their experiences.

Administrative task: A piece or body of work that has to be finished in a specific period (Merriam-Webster's Collegiate Dictionary, 2003).

Anxiety: An emotion characterized by feelings of worried thoughts, fear, tension, and physical changes, arising from uneasiness about the outcomes of a situation or event (Kazdin, 2000).

Buy-in: The acceptance of or willingness to actively support or participate in something such as a proposed new policy, plan, or change (Merriam-Webster's Collegiate Dictionary, 2003).

Change management: A basic set of tools or structures intended to keep a change effort under control. Change management tools are designed to minimize distractions and the negative effects of change (Bryce, 2001).

Collaboration: A mutually beneficial working relationship entered into by two or more individuals or organizations to achieve a common goal (Mattessich & Monsey, 1992).

Communication: The act or process of using words, technology, and behaviors to express or exchange information about ideas, feelings, behaviors, or processes.

Communication is the exchange of information between people (Psychology Dictionary, n.d.).

Deadline: A specific time and/or date that something is required to be completed (Merriam-Webster Dictionary, 2003).

Empathy: A personal quality of uncritical understanding of another's feelings and experiences. It represents the ability to stand in another's shoes and view the world from their perspective (Hojat et al., 2002).

Leadership: Individuals who actively lead or direct a group of people or an organization (Ocker, Huang, Benbunan-Fich, Hiltz, & Starr, 2009).

Organizational culture: Assumptions, values, missions, visions, and beliefs that form the perceptions of an organization's personnel. When perceptions are positive, organizational climate tends to be positive (Anderson, 2012; Yoder, 2004).

Process change: An outline of change for a specific function within an organization (Harmon, 2007).

Recognition: A show of appreciation for an employee's performance that can be used as a tool to motivate employees to demonstrate positive performance. Employee

recognition includes personal recognition for work practices, dedication to the job, and performance outcomes (Brun & Dugas, 2008).

Self-perception: An implied form of self-knowledge based on personal experience, which refers to how individuals view themselves (P. Allen, Hooker, & Mejia, 2015).

Stress: A mental and emotional tension and physical response resulting from a demanding situation or change (National Institute of Mental Health, n.d.).

Team dynamics: Psychological forces—including individual team member personalities—that influence a team’s performance and behavior by the nature of the teams working relationship with each other and their environment (Yardley, 2014).

Technology: The application of science in industry for problem solving. (Merriam-Webster’s Collegiate Dictionary, 2003).

Tenure: The number of years an employee has worked for the same employer, usually accompanied by some additional employment benefits (Hollister & Smith, 2014).

Transparency: A mutual exchange and comprehensibility that allows for honest communication and information sharing (Albu & Wehmeier, 2014).

Trust: Probability that the decision making system will produce preferred outcomes for an individual or group even if the system is left untended (Driscoll, 1978).

Field Representative Focus Group Themes

The focus group responses revealed 10 themes that influenced planned changes among remote employees: affect, communication, collaboration, buy-in, organizational

culture, administrative tasks and deadlines, tenure, process change, team dynamics, and leadership. The emergent constructs of anxiety, self-perception, recognition, and empathy have been rolled up to create the single affect theme related to emotional and psychological responses to change.

Pay and benefits were important to all participants, but the majority did not feel they influenced the implementation of planned change. Because of these findings, pay and benefits as a theme were not further explored. Overall, the findings illustrated that, while there was not a single theme that influenced planned change, each individual theme played an important role in the change process. Respondents identified how each of the 10 breakout themes enabled them to be active participants in the change process.

Administrative tasks and deadlines. Participants reported experiencing an increase in their administrative tasks and deadlines during change. They indicated that an increase in tasks coupled with shorter deadlines decreases efficiency and productivity during change. Several talked about the perceived impact of administrative tasks and deadlines. For example, P11 stated, “They often are asked to complete work on very short notice and ... that gets very overwhelming.” P13 reported,

[Our] administrative tasks have increased and it has been difficult to manage them all. We are wasting an hour or two on something that could have been done in a half an hour [and the tasks] are not being fully explained... or communicated correctly, and that is just taking away from building our business.

Finally, P5 noted, “A lot of time during planned change you are supposed to maintain

expectations, but you need to take the time to go through that change and figure out a new strategy.”

The concept related to administrative tasks and deadlines that emerged from my analysis was that participants described spending a great deal of time completing tasks that they interpret as discretionary to their job function. Participants also noted that short deadlines coupled with undefined work hours resulted in decreased productivity (Ye, 2012). As described in research by Dennis, Meola, and Hall (2013), field representatives thought their status as remote employees prevented them from adhering to clearly defined work hours.

Participants indicated that the time they spent completing administrative tasks could be put to better use. According to Perry (2006), there is a perceived sense from remote employees that an increase in administrative tasks will impede performance goals. To help address this issue, field representatives need to be told how new and current administrative tasks or activities contribute to the success of planned change (Dennis et al., 2013).

Respondents reported feeling a lack of support and direction from leadership in completing tasks. Dennis et al. (2013) suggested that remote teams could feel isolated or miss deadlines due to difficulty collaborating with internal and external teams in different time zones, an issue that may be exacerbated by increasing administrative workloads.

Affect. I grouped together responses relating to stress and anxiety, recognition, empathy, and self-perception to create the affect theme. This theme represents emotional

and psychological expressions from remote employees related to change experiences. Participants who had a positive self-perception during change reported increased confidence in their skill sets. Based on the interviews, it seems that field representatives who communicated positive expressions related to their roles will be more likely to embrace and be engaged with change in positive ways. For example, P9 expressed, “I think I am developing a little bit of a reputation as an innovator. If you want to know how a new approach is done, talk to [me]... I am getting tapped a lot for innovation and fresh perspectives.” P10 also stated, “I think my particular role is understanding my market and what is needed... and being able to relay it to management... day in and day out.” P13 confidently shared, “I think ... my skills as a sales person have definitely improved.” Finally, P12 stated,

I am never afraid to speak out. On our team, I am definitely not the leader, but I am the individual who speaks up the most for myself when I do not get this and I know other people do not get this, as well.

Participants desired to see expressions of empathy from their leaders. The emphasis on empathy is characterized by the remote employees need to feel that their leaders are sensitive to change initiative consequences from their perspectives. They also reported the need to feel empathy for and from other employees. Feeling empathy from leadership and each other strengthens the change process, and may make for smoother change transitions. P9 expressed, “You have got to step it way back before you even know where the other person is coming from.” P7 asserted,

If that middle-level manager embraces that change, they may be more empathetic or understanding of the workload of the remote employee. It depends on the empathy of that person whether they will give you more time, expand your due date, [and] help you with the workload so you do not become overwhelmed... that support really speaks to that person's empathy.

Finally, P6 conveyed,

As a remote employee, it is easy for us to get trapped in the confines of our offices and... feel put upon because we do not see what everyone else is struggling with. We only see our own little world... [we need to] commiserate [and] empathize [with other employees] rather than just feeling put upon [and thinking that] something else has just been put... on us and no one else has to do [it].

Participants also discussed recognition as a motivator for embracing change. They identified recognition as important to encourage remote employees to embrace and support planned change. P4 stated, "[Employees] embracing planned change could be recognized a bit more." P5 expressed, "Awards are sometimes given and that is nice. People like to get an award or like the opportunity to get an award... win something [or] get recognized... even if it is something silly or a silly award."

During focus groups the field team members reported that their productivity suffered during periods of stress and anxiety. They shared their belief that stress and

anxiety led to physical symptoms such as hives, debilitating anxiety, and exhaustion. For example, P4 lamented,

About a year and a half ago I was waking up with hives... it was stress and for me it was the wakeup call that I needed. I vowed I would never let work have an impact on me like that again.

P12 said,

I think with any change there is always stress. Flipping the switch to do something different is stressful because you are doing something you were not doing before... I think when you are under stress you do not work as productively.

Finally, P6 asserted,

As a remote employee, we are in charge of tackling our own stress. We do not have that built-in peer system that [our] corporate peers have. Stress and anxiety can be debilitating because we are in charge of managing that.

These findings suggest that how individuals view themselves within their roles during or as a part of change processes influence their involvement, participation, and support. Self-efficacy is a concept that can be used to describe how field representatives viewed their capabilities and ability to participate in change (Gist, 1987). Although the theory of self-efficacy was not included in the initial theories for this study, it is applicable for this theme. Gist (1987) stated that individual efficacy perceptions are interwoven into the team's goals and performance. The constructs identified that

comprise the affect theme are related to self-efficacy, and a concern for development of self-efficacy among leaders can be used as a tool to help motivate and develop individual team members to embrace new norms or objectives during change (Gist, 1987).

According to Ramsey and Latting (2005), it is important for remote employees to know that their efforts are acknowledged by leadership. In turn, leadership should convey that they also are experiencing change themselves and adjusting to the new expectations. As the participant population of geographically dispersed employees are not eligible for compensation-based rewards, they reported that recognition for a job well done might be just as gratifying. In fact, recognition can improve employees' productivity and performance during planned change (Martins & Coetzee, 2009). The Burke-Litwin change model assesses organizational effectiveness during change and discusses recognition as a variable. Martins and Coetzee (2009) found that recognition is an important motivator in employee performance.

Additionally, empathy was found to be a guiding principle when introducing planned change. In Lewin's change theory, empathy is described as an understanding of others' perspectives and experiences (Ramsey & Latting, 2005). Ramsey and Latting (2005) found concern about empathy is situational during change. Participants who expressed empathetic concerns during change are more likely to participate in change in a positive manner (Ramsey & Latting, 2005).

In accordance with the research of Robertson and Vink (2012) regarding new ways of office work, as remote employees, field representatives were sensitive to

increased workload expectations. Increasing empathetic informal communication with leadership and peers (Fay & Kline, 2012) along with recognition (Martins & Coetzee, 2009) may alleviate some of the stress and anxiety that field representative's experience,

As Mulki and Jarmillo (2011) found in their research, field representatives lack the ability to develop social relationships that are found in onsite workplaces, contributing to increased stress and anxiety. As described by Dalhstrom (2013), field representatives' relationships with each other and leadership are maintained through technology and they do not have regular face-to-face access to peers to help alleviate stress. Pursuing strategies to strengthen relationships with colleagues may diminish the effects of stress and anxiety on remote employees.

Buy-in. Gaining buy-in for change was interwoven through participant focus group discussions. Understanding why change is occurring and securing support for change is a key indicator of change adaptation according to participants. They also sought their manager's buy-in to change as a significant influence of how change is perceived and reinforced. P5 expressed, "If you want your team on board and supporting the new initiative, they need to understand and agree." P7 shared, "It really comes down to if [my] regional my manager [has] buy-in or empathy regardless of [the nature of the] change. If they do not have buy-in, it is just get it done without any support." P4 stated simply, "If you do not care, then I do not care." One participant suggested utilizing employees as a means to increase buy-in among remote field representatives. P4 noted, "If [change] is coming from the top down, maybe everyone does not understand [it] on the ground

level.” In reaction, P8 expressed the felt need to, “Advocate sort of like an internal lower level employee that gains buy-in or several employees kind or going from a bottom-up approach to influence change.”

Direct managers addressed buy-in as something that was needed to support and execute change. Focus group findings indicated that buy-in is pivotal to implementing planned change effectively. Gaining buy-in promotes remote employees’ positive relationships with leadership and team members. Participants also reported that buy-in from peers increases their own buy-in during change.

Enlisting informal power is paramount to buy-in during planned change. Leadership may look to employees who are respected within the organization to help facilitate change (Battilana & Casciaro, 2010). Orgambídez-Ramos & Borrego-Alés (2014) found that informal power results in positive workplace relationships that assist colleagues in being more effective and productive during change. Obtaining buy-in through informal power for change increases communication across teams and with leadership that results in the adaptation of new behaviors, norms, and policies (Battilana & Casciaro, 2010).

Collaboration. Collaboration among the remote field team, with leadership, and across the organization was considered by participants as a vital component for successful change. For example, P12 shared, “Collaboration, whether it is working with other people on your team or working with members of other teams, affects the organization if it is done properly.” Remote employees felt part of the change process

expressed increased contributions to initiatives and projects. P12 said, “I think [what’s] most important... is how everyone works together and that comes from leadership.” Participants noted that the importance of positive collaboration is not limited to just their team, but the ability to work across teams within the organization to contribute to change. P8 expressed, “Encourage team collaboration and encourage team members to work with one another and help out...it helps facilitates change and brings us together.” Also, P4 explained “I think people could model [the changes] because you never know who is doing stuff right... when planned change occurs.” P4 also expressed that, “I think we all work more collaboratively now than in the past.”

The concept of collaboration that emerged was that a spirit of collaboration among employees is integral for effective planned change. All participants expressed the sense that for change to be executed effectively, collaboration is needed not only between field representatives, but also between and within departments at all levels. The data showed that collaboration increases among field representatives during planned change as they exchange ideas, make decisions, and contribute to projects (Long & Meglich, 2013). The need for effective collaboration among field representatives likely will continue to grow as the university implements planned change to compete with emerging markets.

The field representatives also expressed a need for leadership to work more collaboratively with them during the change process. Charlier, Stewart, Greco, and Reeves (2016) reported the importance to remote employees of having leadership that is present and engaged during planned change.

Communication. A common theme discussed by participants was the need for a cohesive one voice communication strategy which informs them of change. Participants expressed the need for communication to be clear and consistent across teams. For example, P4 stated, “Communication must be concise, clear, and repetitive during planned change ... remote employees want communication to be reinforced and driven; when communication is given multiple times, it increases its importance.” P8 said, “During change, [you need to] tell them what you want to tell them, tell them, and tell them what you told them.” However, P10 descended, saying, “Leadership senses there is clear and concise communication, and that is not the case.” Information is coming at field representatives from multiple leaders on the team and each person interprets change and its required actions independently, so a consistent message is crucial. P11 made this point, saying, “There is information rolling [in] from all sides, from different strategic directors, leadership, from regional managers... a lot of stuff... is coming, and that is ok.” P11 concluded, Communication is all over the place during change, the delivery is not consistent. We need a communication plan when change is happening. Still, P6 asserted, “I think there has to be a culture where asking questions or [expressing] contrary points [are] encouraged. I think there has to be a two-way process of communication in place...”

Delivery of the information, whether by email, conference call, or an internal platform should accurately replicate the messaging leadership is cascading down. Participants noted that they were receiving additional communication opportunities

during change. Some expressed concern that the abundance of communication allows for collaboration, but does not always reinforce desired change initiatives. Participants are relying on each other to fill communication gaps. P5 indicated,

We get a lot of emails that mean nothing to us, but we do not get the emails that we should. Communication should not just be with one team... we need to have communication with all three teams and it needs to be cohesive and it is just not.

P12 said, “[While] communication has been clearer because trainings have been completed in team calls and town hall meetings... higher ups could be more collaborative instead of streaming everything downwards to our manager.”

P8 indicated,

You cannot be looking at Salesforce and chatter and emails and SharePoint... there needs to be a communication strategy where anything... to do with a project or particular aspect of the job is located here, and not communicated in pieces all over the place.

About scheduling communication, P10 expressed, “Scheduling conference calls at 12:00 PM to do a big training or for important information [is] difficult...Logistically, this means people miss out on important information and it is hard to catch up when you are extremely busy.” P11 concluded,

My coworkers are coming to me wanting clarification on things that I am not really certain... I fully understand... because I do not think the information is 1) delivered correctly, 2) there is just a lot of information being delivered at the same

time. We try to make sure we are covering each other's backs by saying, 'did you get that email or did you hear this?' etc.

Data analysis indicated that during planned change, communication with remote employees needs to be planned. Communication that is controlled, concise, and repetitive points to the need for an effective communication strategy, especially when dealing with remote employees. For field representatives to feel they are a vital part of the change process, consistent and purposeful communication with leadership is essential. Conrad (2014) stressed that a strategic two-way communication plan implemented by leadership during planned change increases employee productivity and transparency. Field representatives rely on the *organizational grapevine*, as described by Conrad (2014), not only for information, but also for solving work-related issues. However, leadership should focus on communication quality instead of quantity, as participants noted that too much communication might lead to decreased productivity and serve as a barrier to change.

Leadership is challenged to initiate more flexible communication structures as working remotely becomes the new corporate setting. At the same time, communication strategies should have a one voice approach to ensure that messaging is the same across remote teams. As Ye (2012) noted, important communication or new policies and procedural announcements must be planned to include remote employees. Furthermore, these findings suggest that leadership should have a strategic communication plan during planned change that includes two-way communication with remote employees.

Leadership. Focus group discussions included the impact leadership has on planned change and how change is view and adopted. Participants felt that leadership should have a shared vision of change that can be replicated and cascaded to the team. They disclosed the lack of communication coordination across the leadership team. Participants felt that they received multiple directives with different goals and values. P10 expressed,

As a remote employee, we get direction from different sources. Often times, once source has no idea that they have directed us one way and they are overloading us... unless you speak up, you are getting direction from five, six, [or] seven different people. It becomes overwhelming.

P4 explained, “When you are rolling out change from an executive leadership role, [you need to] ensure that direct leadership, [and] direct managers have a full understanding of expectations and how to [accomplish them].” P12 indicated, “Change comes from leadership and they certainly account for employees’ performance... what is going on in the market, and the goals we have to reach.” P13 verbalized,

I think leadership is an organizational factor. If you have someone coming in from a completely different company, they have different values and... way[s] of doing things and, if you are used to something specific in your company, it could change.

P13 further explained,

It is really important for upper level management to understand and embrace the

fact that not everyone is on the same page, and not everyone goes at the same speed... in order to implement planned change effectively, they are responsible for [confirming that] the communication, collaboration, incentive, [and] benefits [are] perfect ...

Most participants were aware that they have limited contact with executive leadership. They rely on their direct manager as a model for change. For example, P9 reasoned,

I do not have much of a relationship with executive leadership. I talk to [them] three to four times per year or see them at different meetings... beyond [my] regional manager [my contact with leadership] is pretty minimal, which is expected.

Counterintuitively, perhaps, when leadership expresses a lack of knowledge or shows ambiguity concerning change, it can create a sense of trust toward managers. Again, P9 shared,

When our manager... or our VP does not know something, there seems to be a lot more honesty... When they don't know something, they are pretty candid about it... [When] we are learning this together... there seems to be more honesty and vulnerability... and I appreciate it.

Participants said they need leadership to be succinct, collaborative, communicative, and strategic during the execution of planned change. In short, remote employees look to leadership for clear direction during the change process. Systems

theory describes how leadership impacts field representative performance and acceptance of change by shifting their outlook from decision making to embracing change (Anderson, 2012). Participants rely on leadership to articulate expectations, goals, objectives, and desired outcomes during times of change. Without such direction, change may be unsuccessful.

Field theory illustrates methods leaders can use to motivate change acquiescence (Burnes & Cooke, 2013). During change, field representatives' behavior and acceptance are predicated on their response to leadership. Leadership initiates new expectations and metrics to field representatives in planned change (Gerswhin, 1994).

The theory of self-efficacy (Gist, 1987) is applicable to the leadership theme. Self-efficacy asserts that individual behavior and environment are interrelated (Staples, Hulland, & Higgins, 1999). Leadership is the guiding force behind change, and how leaders view their ability to change influences their team. Participants stated that they needed leadership to be present, communicative, and supportive. Self-efficacy affirms the ability of leadership and field representative to contribute to change.

Organizational culture. Participants introduced the discussion of organizational culture as an indicator of how change is being perceived and reinforced. Organizational culture has been described by participants as dynamic, meaning there is opportunity for growth and change as goals, norms and beliefs transform. Participants interpreted organizational culture differently, but within each individual perception underlying common characteristics were shared. P9 said, "I actually feel positive because I see

growth... I see opportunity. I like the fact we are so bottom up... and I do feel there is an opportunity to be autonomous and help design your role..." P8 specified, "When you are in the office, you can feel the culture shift during change; feel the way change effects folks. But in a remote setting, you do not have that ability." P12 stated, "Overall, I think it is a positive climate... we are looking to reach the same goals and working together to do so." Finally, P5 asserted, "I think our team is [as] connected as it has ever been, but I still feel disconnected from the organization. I think as a team we have a culture of helping one another and supporting each other through change."

Although the majority of participants expressed a positive perception of organizational culture as a remote employee, two remote field representatives described organizational culture as not inclusive of remote employees. Field representatives are left to themselves to interpret organizational culture which can cause varying attitudes towards change. Two participants expressed their feelings of isolation relative to organizational culture. P6 shared, "When working with remote employees, [leadership needs to] recognize that they are isolated from some of the other events and things happening in the larger organization, and to make them feel a part of that and welcome." P7 said, "Sometimes the organization ... it is not sensitive to remote employees... there should be duplication to make those persons in the field feel connected... or do not tell us there is an ice cream social onsite." P6 also shared, "I feel as connected to [the organization] as they do to me, and that bond has weakened over the last few years... I feel like my tie to the organization should be stronger than it is right now..."

Consistent with organizational culture, participants expressed how organizational transparency influences their willingness to accept change. Transparency was important to participants as it allowed them to realize the purpose of new goals, norms, policies, and procedures during change. Participants expressed the need to understand why change is occurring and how the change will improve their role, department, and organization. For example, P5 reflected, “We need to be able to look back [to] understand... why the change is happening... It needs to be transparent.”

Overall, shifts in organizational culture related to planned change was perceived differently by each participant. Focus group findings showed that participants want to feel included in their department and organizational cultures during planned change, but feeling included is a challenge for remote employees due to the inherent nature of their remote involvement. The results also highlighted the effect of the organizational culture on field representatives’ feelings of connectedness to the university. It is possible for remote team to feel connected to each other, but feel disconnected from the larger culture. Participants wanted to see onsite organizational initiatives extended to remote employees to increase their sense of connectedness.

As described in the Burke-Litwin model, changing the culture of an organization does not happen instantly during planned change (Anderson, 2012), but occurs over time (Burke & Litwin, 1992). Likewise, the focus group findings suggested that the university’s organizational culture has evolved over time. Field representatives’ past

experience with the organizational culture during planned change may have affected their feelings of connectedness to the university.

The Burke-Litwin model of change connects the organizational culture to the overall effectiveness of communicating change and considers the role of transparency during planned change (Martins & Coetzee, 2009). Systems theory also is important to the concept of transparency as it explores the effects of planned change on the organization's environment and stakeholders (Anderson, 2012). Transparency is interconnected with the university's environment and culture.

Lewin's theory of group dynamics indicated that such dynamics also influence organizational culture. Participants reported both positive and negative aspects of the university's organizational culture. The disparity in experiences may be related to employee's geographic region and their relationship with their team and/or manager. Participant findings suggested that positive group dynamics create a positive organizational subculture among remote employees (Burnes, 2009).

Process change. The focus group participants considered a variety of instances where process change was the driver of change activities. Planning for change by putting an emphasis on activities that are designed for change progression, such as changes in technology, processes, or systems, increases understanding and learning of what is required. Participants noted that adopting process change can enhance their overall perception of change, but individual perceptions of process frameworks may be rooted in

organizational culture. P7 urged, “Leaders need to show us what good looks like.” P6 stated,

I think during planned change there is such an initiative and effort to go forward... that sometimes the past that we so carefully learned is dismissed if not disrespected... We have diligently learned this process, diligently learned this procedure, and... boom, there is another one in place... this [issue] is probably true for all employees, but certainly more [so] for remote [employees] because again we are isolated... at least say... this is a procedure change, and... we are glad you embraced the old procedure, and now we are doing this going forward.

P5 also shared,

I think we need ... clear expectation[s], [a] common structure... common frameworks, and [a]common paradigm. As a remote employee, we are often told to... do this, or do that, and not really given a framework for the model... It is so important to know clear expectations and a plan. Not a rough plan, I want concrete evidence.

Remote employees require access to support of process change involving technology and ongoing training for new technology resources to implement planned change. Participants stated that challenges in technology limited their ability not only to participate in change, but also to complete their regular job functions. Three participants discussed the impact of technology on process change. For example, P12 emphasized the importance of making sure technology works properly stating, “Otherwise you cannot do

your job, and that affects the organization... employees need to have all the tools to do their job..." P5 explained, "Technology is a huge issue with us when we have planned change. When there is planned change... there has to be that technological support."

Finally, P13 expressed,

Our technology... We are trying to be this better company and implement new technology, but we are not mastering it and it is slipping through the cracks... I think it is even harder being remote to learn all this new technology... we have been trained through different calls, [while] on the computer, and [remoting] into trainers' computers. I feel it would have been easier to be trained face to face.

An interesting concept related to process change that emerged from analysis was that process change could evoke emotional responses that can invest or fail to invest remote employees during change processes or even daily routines. Field representatives suggested that, during process change, remote employees need concrete examples or a model for the process change to be effective. Results indicated that the framework for "what good looks like" during change should be communicated throughout the university's different departments (Caldwell, 2012). During process change, field representatives reported going through different emotional stages, including feelings of connectedness and reluctance to let go of old processes. One implication related to this theme was the need for change to be connected not just to the mission but also to the vision of the organization.

Systems theory describes how change affects an organization and its stakeholders. For example, field representatives described how organizational strategies and guidelines affected process change (Anderson, 2012). The Burke-Litwin model is applicable to process change as this model describes the changes in system procedures and processes (Waclawski, 2002).

Lewin described in his change model the three steps that must take place for process change to be successful. The first step is unfreezing where field representatives need to be open to a process change (Sarayreh et al., 2013). The second step is moving and this occurs when the new process is learned and repetitively practiced (Sarayreh et al., 2013). The third step is refreezing, which occurs when the new process is fully adapted by field representatives (Sarayreh et al., 2013). Unacknowledged in the systems theory approach are the human elements, like the need for connectedness. Implementing process change while acknowledging the importance of existing expertise and the relevance in pursuing the organization's vision would be helpful when incorporating systems theory constructs for implementing planned change.

Systems theory also describes the impact planned change has on the organizational structure and function (Anderson, 2012). As an example, participants discussed a need for ongoing tech support during planned change to ensure that they understood the value of the technology and learned how to use it properly. Field representatives also expressed needing access to technology support and tools to foster their ability to communicate and collaborate with colleagues and leadership (Hoang et al.,

2008). Unexpected challenges with new technology related to new procedures will certainly hinder the implementation of planned change.

Tenure. Tenure of remote employees was interconnected with participants' perceptions of planned change. As discussed during interviews, willingness to accept change, perceptions of organizational culture, and motivation may be tied to employee persistence. Participants acknowledged their tenure with the organization when discussing their interpretation of desired change behaviors and outcomes. They also identified tenure as their perceived informal hierarchy among their peers. P9 stated,

I recently came from another higher education organization, which did things very differently... frequently I find myself, before I understand the current state of affairs... being expected to understand the change... it is less [frequent] now, but I used to experience this a lot in the beginning. It was almost as if the changes were made under the expectation that 97% of [the] people had been here for 5 to 10 years.

P11 expressed,

I have been a part of this organization for six plus years. As we changed over the last year and a half, we have become more [business development] focused and...expectations have changed... we are expected to be more polished professionals... it stand[s] out significantly that they are expecting a different skill set from the team.

P9 said,

It seems like you have to earn the right to speak up. I do not know if a newbie would be able to point this out. It seems like, at first, I could not say [anything], but now that my numbers [are] up, I have earned the right to speak up.

P13 noted, “Having been with ... the organization for over five and a half years... we have had a lot of change... with the new title, new job responsibilities, and... [a] new job description, [our] roles [have] changed a lot.” Finally, P5 stated, “For the nine years I have been here, we have always had to prove to the organization we are a viable channel.”

Field representative responses indicated that tenure affects how planned change is accepted. Less tenured employees reported feeling that change and change initiatives were designed for colleagues who have a longer tenure with the organization. Participants with a tenure of 5 years and longer suggested that planned change is an ongoing process. Less tenured employees reported change as a positive experience, but expressed feelings about being less influential in how change was implemented.

Although field theory was developed to see how groups were formed and socialized (Burnes & Cooke, 2013), it applies to tenure as it examines how different variables, such as one’s longevity, influence planned change (Gershwin, 1994). Field theory, therefore, relates to this theme by providing a foundation from which to consider motivational factors for accepting planned change based on tenure.

Team dynamics. Participants described an increase in positive team dynamics during change as communication, collaboration, and peer relationships were strengthened. Leveraging their internal relationships and creating an informal support system has helped them adapt to changing organizational norms and goals. Several participants acknowledged a feeling of increased connectedness to their colleagues and team. As indicated in interviews, interpersonal dynamics between participants directly supports mechanisms of change. Describing how they position relationship with their colleagues, participants explained:

P11 stated,

I think we do a really good job... leveraging our internal relationships [to address] questions and concerns and problems. Those of us who have been here a long time have... people we lean on, [and] reach out to... being [a] remote [employee makes these relationships] invaluable... new people or older people that [don't] have... established relationships... should try to get them. There are times I am frustrated or things are not working well for me, and reaching out to somebody helps talk me off the ledge. Those are huge relationships.

P12 indicated,

I think I have a positive relationship with coworkers. I collaborate with them [and] feel comfortable enough to ask them if I have questions, and reach out to them and... they feel the same. We have personal relationships above and beyond work... which is good.

P12 said,

We are communicating more as a team because we are in that point of change where we are all getting used [to new things] ... We are communicating more, so as a team we are looking to each other as a resource for help.

P5 expressed,

Going through change has brought us a lot closer together... I think we all work more collaboratively. We all know we are stretched to the limits and doing so many different things, and I think we are reaching out to one another on a more frequent basis, so in a weird way it is bringing the team together.

Remote employees expressed the need to feel trust in their professional relationships. Participants described the importance of trusting their leadership and colleagues. Trust is critical for change to be successful as it helps create a sense of team. One participant explained how trust creates a sense of team. P9 reasoned, "It is like you are building a tighter net, so people do not fall through, and processes do not get left undone. You both have really strong ownership and trust."

Team dynamics are individual relationships among team members provided emotional support and additional resources throughout planned change. A related theme is planned change can improve team dynamics by bringing the team together for a common goal. Field theory explicates how groups are formed, socialized, and maintained in a specific environment (Burnes & Cooke, 2013). Individual participants' perception of change is shaped by the team members' perception of change. Participants' environment

and relationships are formed through technology and the relationships that make up a team's dynamics take place primarily over email communication and telephone. These electronic communications are the foundation for the remote field team.

Lewin's theory of group dynamics describes how collective group characteristics overshadow individual characteristics (Lewin, 2008). These participants described how they do not see themselves as individuals, but as a collective unit. In this way, team dynamics influence field representatives' acceptance of change.

The Tuckman and Jensen model of change addresses how groups accept planned change and adjust to new norms (Tuckman & Jensen, 2010). These participants described the different stages of the change model as they described their interactions with each other and leadership. As change is occurring, communication and collaboration among field representative increases. These relationships that ensure that the collective group is adapting to change. Participants help each other cope with change, which in turn strengthens the team.

Burke-Litwin's model of organizational change indicates that change can affect the level of trust between field representatives, leadership, and the organization. Field representatives' feelings of trust are derived from their individual perceptions during change (Martins & Coetzee, 2009). The climate and culture of the university is responsible for creating trust among participants (Martins & Coetzee, 2009). When employees trust leadership, change is more likely to be effective and increase productivity (Martins & Coetzee, 2009).

Summary analysis of field representative focus group themes. I have discussed patterns, variations, and meaning for each theme in my thematic interpretations in this section. The process of looking for patterns of responses across field representative focus groups yielded 10 primary themes that represent the participants' perspectives of planned change, including collaboration, communication, buy-in, organizational culture, administrative tasks, tenure, process change, affect, team dynamics, and leadership.

Because field representatives generally are the subjects, rather than the architects, of planned change, such initiatives do not always address their needs. The findings from the field representative focus groups provided a basis for individual participant interviews. The purpose of individual interviews was to elicit a greater understanding of the perspectives of remote employees who experienced planned change and to confirm or refute the focus group themes to increase the reliability of my interpretations. The individual field representative interview findings are provided in the next section.

Individual Field Representative Interview Findings

At the conclusion of the focus groups, each participant was invited to participate in individual interviews. Of the 10 focus group participants, eight participated in individual interviews. Building on the themes unpacked during the focus groups, participants were interviewed individually and asked a series of questions designed to gain a deeper understanding of their perceptions and experiences during planned change. Resulting themes were then connected back to the study's research questions.

Representative examples of participant comments that addressed the five main research questions are provided below.

Research Question 1: What organizational factors influence the implementation of planned change at the university?

During the individual interviews regarding research question one, participants noted communication differences by region, the importance of technology, and the need to know why change is occurring. One team participant, P8, stated,

The communication culture. I think some things move faster in the North. The closer you are to the hub; it just seems that there is a higher level of being in the know... When you have that... constant immersion in what's going [on, along] with the... faster paced communication, [and] the greater the sense of urgency, it seems sometimes... you get further [in the North than in the] South and West.

In General, participants also felt responsible for increasing communication with their team when change was occurring. For example, P5 said, "Communication is definitely key, and I think the onus is on the employee and manager to make sure that communication happens. So, I am personally taking more responsibility to understand what good looks like."

Importantly, the representatives with the longest tenure live in the closest proximity to the corporate office. Participants from the west team identified challenges with communication and collaboration (also related to RQ2 findings) involving colleagues during planned change because of their geographic location and different time

zone. Participants from the south did not identify specific geographical challenges or advantages because of their proximity to the corporate office.

Participants indicated that technology is the primary source of communication for the team and discussed how technology keeps them connected to their colleagues, leadership, and the organization (Hoang, Nickerson, Beckman, & Eng, 2008). Through a series of new platforms and tools, technology has enabled the team to participate more fully in change processes (Hoang et al., 2008). Participant 12 suggested, “I think that technology definitely keeps us connected, especially since we are remote and work from the road quite a bit. Having all these different tools makes it easier to get the job done.” In other words, using technology to participate in meetings taking place at the university enables field representatives to understand why change is occurring and the goals of the change. This technology resource, therefore, helps facilitate buy-in for change among field employees. Finally, participants also noted their need to understand why change is occurring and how this change is going to affect them personally. For example, P7 shared,

I am a person who wants to know why we have to do it, otherwise it has no meaning to me... you are telling me to [do] this process this way now—XYZ instead of ABC—why? Tell me why, and I will have ownership of it.

Martins & Coetzee (2009) discussed the Burke-Litwin change model in terms of how change affects internal and external environments. Participants described how emerging technologies increase connectedness to the organization leading to higher levels

of participation during planned change. Individual interviews with field representatives regarding organizational factors that influence planned change reflected the 10 themes discussed in the focus groups. Additionally, participants discussed how these themes affected their interpretations of the change process from their personal and regional perceptions. Lewin's theories of change connect the interwoven variables of change that participants described above (as cited in Voelker et al., 2011).

Research Question 2: How do team dynamics influence the implementation of planned change at the level of remote employees at the university?

Team dynamics was identified as an important facilitator for remote employees to embrace change. In fact, participants described team dynamics as one of the biggest determinants of the success of planned change. Participants stressed the importance of their relationships with their colleagues, as they are each other's main source of support.

Tuckman and Jensen's (2010) group dynamics theory, Lewin's (2011) theories of change, and the Burke-Litwin (2009) model of change all are interwoven into team dynamics. Individual perceptions of change influence the collective group. In other words, if the team is on board with change, it likely will occur (McGarry et al., 2012). Participants discussed needing to feel part of a team based change process. Thus, the needs of the team can outweigh individual barriers to change. There were no dissenting views on the importance of trust and positive team dynamics when pursuing change. P9 stated, "If I am viewed as a team player that helps facilitate change for good in the organization, I am more likely to adapt to it quicker and make it a bigger priority." P8

claimed, “Everyone was driven to make the change, and this is why it was working out so well. [It is important to] validate the effort the team is spending.” Finally, P13 shared, “It is fine to encourage team collaboration and encourage team members to work with one another and help out.”

Tuckman and Jensen’s (2010) theory of group dynamics identifies some of the complexities of individual team members embracing planned change. As presented in the representative participant quotations, trust was an important factor to support planned change. Tuckman and Jensen (2010) described different stages of team dynamics that address how teams form trust. Additionally, participants described the need for trust to extend beyond their immediate colleagues, to leadership. P4 offered, “With my direct colleagues and my direct manager, I do feel there is a level of trust... You could not be a remote employee for years and years without trusting the individuals who are directly connected to you.” In summary, positive team dynamics increase when team members trust their leadership.

Research Question 3: How does leadership influence the implementation of planned change at the level of remote employs at the university?

Participants discussed the need for leadership to understand the goals and expectations of planned change so they could share the goals of change with employees (Anderson, 2010). Individual participants stated the importance that leadership has a clear vision of change and a road map to guide the change process (Latham, 2012). When leadership meets with difficulty articulating change, the system can lose balance while

participants struggle to implement the envisioned change. For example, P12 shared, “If your direct supervisor... does not understand the goals, then they cannot articulate them to the staff... If they are not buying in, they are not going to relay the information properly to make sure the initiative is supported.” Overall, the south team participants felt a greater connectedness with leadership.

Leaders also need to believe in the directions they are giving to their employees. Participants stated that their direct leaders need to be involved in communications about the change process. When describing managers’ involvement with planned change, P13 said, “I think our leaders have stepped up a little more and been more active in change,” while P9 countered, “I do not know if I have ever seen someone be that honest [before].” Participants gain buy-in for change from leadership and for change to be interpreted as positive, leadership must fully buy-in themselves (Burnes & Cooke, 2013). It is also important for leadership to positively motivate and encourage participants during the change process as well as recognize and value the efforts of the employees who are executing the change. Participant 12 commented that “To keep us encouraged and motivated... buy-in has to be from your direct supervisor to support the initiative from your VP or who[mever] is above him or her”. Similarly, Burnes and Cooke (2013) discussed in field theory that leadership must motivate employees to change.

Fay and Kline (2012) indicated that informal communication between remote employees and leadership creates opportunities to forge interpersonal relationships. Quiros (2012) stated that interpersonal relationships with leadership create trust and

openness. Participants discussed that interpersonal communication with leadership increases the dissemination of information and collaboration among the field team.

Research Question 4: How do field representatives at the university experience planned change?

Participants reported experiencing emotions during planned change. Individuals described being asked during planned change to adopt a different process after using the previous one for years. In order to fully embrace a change, participants expressed the need to fully understand why the change is needed and for leadership to be excited about it. In other words, leadership modeling change may ease the emotions that accompany change. P7 stated, “The emotional framework is vital to planned change because if the workforce is stressed... defeated, [or] unmotivated, then you are not going to get the results you desire.” P8 also stressed the emotional side of change, saying that leadership should,

Recognize[e] the humanity of change... the emotional side of change, the impact it has on employees’ day-to-day thought processes, and energy spent switching processes... the physical and emotional part of what change does to people and their relationships with each other.

One participant’s reflections on experiencing planned change focused more on relationships. P11 noted,

I think people do not see life from your perspective. There are times you think, ironically, the closer you get to the team, [that] somebody at the street level would

get it [better]... but there are times I think M3 gets what we are going through more than M2 in terms of personal, emotional, and physical [effects]. I find, often times M3 understands the human element and that fact that not everyone is like her.

These experiences are strongly related to the focus group theme of affect, as well as the focus group process change theme implication of the importance for leadership to connect and communicate how change helps to pursue organizational vision when implementing planned change (see p. 84).

Research Question 5: How does the planned change process affect the organizational climate from the perspective of the university's field representative remote employees?

Organizational climate plays an important role during planned change. When the organizational climate is positive, participants are more likely to be positive about change. Participants generally had positive feelings about the organizational climate during planned change. Organizational honesty and a sense of connectedness to the organization supported the adaptation of change among the field representatives (Anderson, 2012). For example, P4 stated, "I feel connected [to the university] because I talk about it every day... Do I feel passionate and connected to the university? I do. Do I feel passionate and connected to the company? Not as much." P9 shared,

I have seen a more honest approach [from] the organization when there [are] changes. I have found more honesty regarding what changes are coming, why

they are coming, what might be the ramifications if the change is not made. So, I really have a higher view of expectations.

Furthermore, participants indicated that motivating and recognizing participants may help increase their desire to participate in planned change, and these affect theme constructs would further strengthen organizational climate (Yoder, 2006). Participant 12 noted, “There has to be a light at the end of the tunnel... during change.” P13 observed, “A lot of the things that I feel make us successful and make them proud of us [and] who we are as a team isn’t always highlighted... [However,] it is better than it has been...”

Summary of Remote Employee Findings

Focus groups and individual interview themes described the experiences of field representatives during planned change. Ten themes were revealed during focus groups and reiterated during the individual interviews. The data indicated that all themes played a role and were interconnected with implementing change. Table 1 summarizes each of the five research questions and the themes that emerged from both the focus groups and individual interviews with field representatives.

Table 1.

Field Representative Focus Group and Individual Interview Findings

Research questions	Emergenced themes	Connecting theories
1. What organizational factors influence the implementation of planned change at the level of field representative remote employs at the university?	<ul style="list-style-type: none"> • Administrative tasks and deadlines • Collaboration • Communication • Process change • Affect 	<ul style="list-style-type: none"> • Action research • Burke-Litwin • Systems theory • Tuckman & Jensen
2. What team dynamics influence the implementation of planned change at the level of field representative remote employs at the university?	<ul style="list-style-type: none"> • Buy-in • Tenure • Affect 	<ul style="list-style-type: none"> • Lewin's theory of group dynamics • Tuckman & Jensen
3. What leadership dynamics influence the implementation of planned change at the level of field representative remote employs at the university?	<ul style="list-style-type: none"> • Buy-in • Collaboration • Leadership • Organizational culture • Affect 	<ul style="list-style-type: none"> • Field theory • Self-efficacy • System theory
4. How do field representatives at the university experience planned change?	<ul style="list-style-type: none"> • Leadership • Affect 	<ul style="list-style-type: none"> • Lewin's change theories
5. How does the planned change process affect the organizational climate from the perspective of the university field representative remote employees?	<ul style="list-style-type: none"> • Leadership • Organizational culture • Team dynamics • Tenure • Affect 	<ul style="list-style-type: none"> • Burke-Litwin model of change • Systems theory

As shown in Table 1, all the theories of change are interwoven within the themes . Furthermore, for change to be meaningful there is not one theory that drives change over another, but each can be used to understand and inform differing perspectives of how change is best implemented. The next section considers change from the perspectives of the remote managers who directly managed the field representatives.

Remote Manager Focus Group Themes

Manager focus group responses revealed 10 themes that influenced planned change among remote employees: affect, communication, collaboration, buy-in, organizational culture, administrative tasks and deadlines, change management, process change, team dynamics, and leadership. As with the focus group themes, the constructs of stress and anxiety were combined with other emotion constructs to create the single affect theme related to emotional and psychological responses to change.

The questions for the managers were designed to elicit information about their roles in implementing planned change to a remote team as well as their perceptions of and experiences with change processes. The manager focus groups unpacked 10 themes, as follows:

1. administrative tasks and deadlines
2. affect
3. buy-in,
4. change management,
5. collaboration
6. communication,
7. leadership,
8. organizational culture,
9. process change, and
10. team dynamics

Nine of the themes unpacked from the manager focus groups were repeated from the field representative focus groups. The change management theme, #4 above, was unique to the managers. Themes were grouped by comparative relationships of manager responses. Relationships between each theme were explored separately to find links to remote managers and planned change. The tenure theme emerged from the field teams was not unpacked as a significant theme from the manager interviews.

Manager focus group findings highlighted the significance of each theme when implementing planned change. The remarks indicated that the themes are interconnected and that each supports to the success of planned change. The primary and secondary themes and supporting manager quotes are presented below.

Administrative tasks and deadlines. The managers highlighted time management as an important skill when it comes to tasks and deadlines. Administrative tasks and deadlines are important to meeting departmental and organizational goals. Participants are often tasked by executive leadership to provide feedback or information by a certain deadline which is pushed down to the team. With respect to deadlines, PM3 stated, "It is tough... with some of the planned changes that we have, and the timelines we are expected to implement them." To meet the challenge, PM2 recommended, "Focusing on a few measures at a time, and being consistent at those before you take on new tasks." PM2 also volunteered, "There's only so many hours in a day, there is only so many things that you can do in a day to effect that change. And at some point it's... like you lose track of time."

The main idea related to administrative tasks and deadlines that emerged from data analysis was that tasks and deadlines are designed to meet organizational objectives. As administrative tasks and deadlines were an important theme in field representative focus groups, they proved to be the same for remote managers. Remote managers do not adhere to a clearly defined work schedule and only consider the date a task is assigned and when it is due (Dennis et al., 2013).

In summary, the initiation of deadlines and tasks comes from executive leadership with little input from remote managers. Tasks that require collaboration and problem solving should be effectively communicated with the field team in a group meeting. Remote managers should set task competencies to ensure goals are measurable and deadlines are understood. Ye (2012) stated that a consistent communication strategy and leadership support reduce the likelihood of missed deadlines.

Affect. Leaders must manage, not only their own, but also the remote team's emotional and psychological responses related to change experiences. Remote managers must cope with uncertainties and doubts among the team. The managers reported that making themselves available to their employees to discuss change can actually lessen feelings of stress and anxiety. For example, PM2 stated,

Stress and anxiety lead to failure, noncompliance, or mediocre performance... you have to ensure that the team... or the employees understand the change... how it's going to affect [them, and] what those outcomes should look like, so that they have an opportunity to achieve those goals... because if it is really not clear, then anxiety sets in.

PM3 expressed, "People will definitely call me if they're stressed out... 90% of the time, [the stress] comes from confusion [and] they just need a little bit more clarity on how the planned change is going to affect them." PM3 added,

To manage [the] stress and anxiety of the team... [I also] have an open door policy, so if they have an issue, [they can] just come to me... then they seem a lot more calm when they get off that call.

PM2 also shared the personal effect of stress and anxiety on their own interactions with their team, noting that, "Stress and anxiety can lead to managers being short tempered with employees or even leaders."

The concepts related to affect that emerged from manager focus group analysis were that remote managers employ various tactics to mitigate the effects of stress and anxiety on productivity during change, and that leadership also must manage their own internal stress and anxiety to support their teams. Planned change is stressful and can be associated with negative feelings and anxiety (Judge, Thoresen, Pucik, & Welbourne, 1999). Stress and anxiety are interconnected with remote managers' ability to implement change. Successful implementation of planned change rests on the ability of remote

managers to suppress and nullify stress and anxiety within their teams (Judge et al., 1999).

Planned change is a strategic form of growth for the university and the field team; however, successful adaptation of change is dependent on field representatives. Fugate, Prussia, and Kinicki (2012) found that implementing a great deal of change at one time can be perceived as negative for employees, and will require managers to employ techniques to diminish stressors. Remote managers can use motivation and positive reinforcement to help employees disassociate change from the negative feelings it often produces (Fugate et al., 2012). The reward construct was also subsumed under the affect theme from the field representative focus group and individual interviews.

Buy-in. A common theme recognized in manager focus groups was the need to gain buy-in from field representatives for change management strategies to be accepted. Managers acknowledged that a perceived lack of buy-in from them could adversely influence their team's attitudes towards change. They discussed preparing their teams for changes by creating excitement during the transition and by being enthusiastic and supportive as change occurs. PM2 declared, "I think, as a director, you have to fully buy-in [to planned change]." PM3 also emphasized the importance of getting buy-in from everyone, saying, "Some of the change is very sudden and... sometimes I feel... behind the eight ball on what I should be directing the team to do because it was so sudden and it wasn't really vetted through us." PM2 followed up, noting, "You're never going to have complete and total buy-in from your team." Finally, PM3 said,

I just feel that [getting buy-in] minimizes negatives or [helps prevent employees from] wondering ‘why are we doing this?’... I try to put myself in the strategic manager’s position and I would want to have faith that [the] idea was fully vetted before [it was] rolled out. I want to keep everyone calm, positive, and gain their buy-in to make whatever planned change we are making successful.

Buy-in at all levels is an essential element for change initiatives that are to be carried out by field representatives and supported by leadership. Managers recognized they first must buy-in to the strategy offered by the university’s executive leadership to create buy-in from their teams (Cabral & Johnson, 2015). This sentiment was also expressed by some of the individual field representatives. Leadership buy-in also increases field representatives’ access to support and resources during change. Executive leadership should openly support managers by illustrating how change is part of the larger organizational vision.

Orgambídez-Ramos & Borrego-Alés (2014) stated that informal leadership is an important component of the change process. Additionally, highly visible change permits flexibility in how work is accomplished; promotes positive relationships among superiors, peers, and subordinates; and facilitates the necessary support of employees required to achieve broad buy-in (Orgambídez-Ramos & Borrego-Alés, 2014).

Change management. Interwoven through remote manager interviews was the concept of change management. Participants described various strategies and tactics they deploy to manage change individually, and within their teams. Recognizing that they

need to meet individuals where they are when adapting to change, leaders implement various activities designed to alleviate potential barriers. One manager (PM2) shared a level uncodified resistance to change among field team members, indicating, “They are successful in that environment, and they don’t want to change.” For the most part, however, the managers, including PM2, discussed their behaviors and attitudes for proactively managing change. For example, PM3 stated

[As] a remote manager... [I’m] trying to keep everybody as focused... [and] as positive as possible... I really drive home [that employees should] come to me with a problem... so... we can start brainstorming the problem together... I think [this] is really important in not [only] implementing the change, but [also in] managing the change.

PM2 added, “Issues during times of change may be due to the fact that ... nothing has been clearly defined. We are doing so many things at one time in the change process, that we’re the jack of all trades.” PM3 added,

Last week we introduced this planned change, so [I asked employees] what are you doing this week? What is your plan for the next few weeks? ... [I want] them to... think about it and then develop their own plan and guide them appropriately.

PM2 summarized, saying,

Our team has gone through a series of changes, and ... there’s always a change coming up... [Therefore] we are accustomed to change... [Managers need to] ... let [employees] explain to you, face to face... how they feel about the change...

[and] if there [are] things we can tweak to make it better, because ultimately the changes affect the employees... [I ask them to] bring me suggestions, or tell me what's not working and why... and let's come up with some ideas... to make the changes [go forward] from there.

The concept related to change management that emerged from analysis was that change management occurs when managers strategically align change competencies in order to cohesively communicate, execute, and assess change. Change management is a systematized method for ensuring that planned change is implemented completely and efficiently (Bourda, 2013). Remote managers direct internal changes in field representatives' processes, resources, projects, and daily actions while also interacting with all levels of university leadership. Bourda (2013) stated that for change management to be deemed effective, leadership must take into account contributions individuals make in accomplishing the change.

Change management requires a structured process and steps that guide the implementation of planned change. Lewin's three-step change model is used as a framework for change management. Each of the three stages proposes specific activities that address motivation, implementation, and adherence to the change (Bourda, 2013). The first stage is the motivation to change (unfreeze). The second stage includes effective and consistent communication that helps remote employees to embrace new processes, goals, norms, and expectations (change) (Sarayreh et al., 2013). Lastly, the organization

returns to a sense of stability (refreeze) (Sarayreh et al., 2013). The model's three steps continue to reoccur as long as change is present (Burns, 2004).

Collaboration. Participants felt that effective collaboration was among the hallmarks of change. Collaboration across leadership and internal teams fosters effectiveness when engaged with various goals, norms, and measures of success. Participants expressed the need and importance of collaboration during planned change. For example, PM2 stressed,

Collaboration... amongst leadership and amongst your individual teams is a big factor... with collaboration you get to share best practices. You get to share, and hear, and see for yourself the changes that are being made and the success stories that you have.

PM3 shared,

I think [collaboration] has broken down some barriers between leadership and employees and other departments... [by] being able to incorporate the cross-team collaboration or breaking down the silos within different departments.

The main concept related to collaboration that emerged from the analysis was that collaboration allows leadership to discuss and ideate both barriers and successes criteria that are critical to change management among each other and the remote team. Manager interviews defined collaboration—among leadership, field representatives, and departments—as a driving force for successful planned change. According to Peters and

Searby's (2012) action research, remote managers need to participate in planned change themselves in order for change to occur within the field team.

The Burke-Litwin model of organizational change is an important theory for consideration of this theme. Participants expressed that collaboration creates consistency while breaking down obstacles to sharing best practices. The Burke-Litwin model of organization change connects how individual departments perform during change to the performance of the overall organization (Anderson, 2012; Burke & Litwin, 1992).

Change originates with the leadership teams. To increase collaboration elsewhere in the organization, all levels of leadership need to participate in transformation.

Communication. The managers acknowledged communication is the origin of change, and an effective and consistent communication strategy is an important principle of effective change management. The groups' opinion was that communication propels change. For example, PM3 stated, "Communication is the biggest positive influencer and the biggest driver for implementing planned change." It was also stressed that communication strategies should account for field representatives' geographic locations to ensure information is received in the best possible ways. Again, using PM3's example,

I do not want them to have Pacific Time... 7 am meetings... I try to keep a little of their balance by not forcing them to operate on east coast time zone... things always happen on east coast time, [for example] change is being rolled out or there is a big meeting. It should be more respectful..

Managers also expressed the need for information to be dispersed in stages, with corresponding change goals and actions. PM2 said,

I think more consistent communication [is more important] than anything else if you're going through a change process. And this week we talk about one part of it. Next week we talk about another part, next week we talk about another part, and... we're never consistently focusing on the same things to move the change needle.

PM3 said, "We [the managers] tried so hard to make sure we have the same voice... and then we talk about what we're going to cover with you guys, and ... making sure we're delivering consistent messages." PM2 concluded, "I think [in] positive [communication]... the message is clear. It's understood and [it's] communicated... from either the employees and the leaders back to the executives, so that it's understood that everyone understands the objectives."

The main ideas related to communication that emerged from the analysis were that remote managers do not have a set of communication norms that guide their communiques, but instead they use their individual communication styles and preferences (Malhotra, Majchrzak, & Rosen, 2007). Carbal and Johnson (2015) stated that during change, it is important for leadership to have clear messaging. In contrast, participants described the strategy of using the same voice to relay important communications to the remote team.

Systems theory discusses how different systems interact with an organization's communication channels (Morgeson, Mitchell, & Liu, 2015). The theory also connects change event effects to organizational communications (Morgeson et al., 2015).

Managers also are part of the organizational communication system and are responsible for delivering messages to their subsystems. If managers are open and positive to change, the messaging will be perceived by field representatives as optimistic. To create an open environment for change, management messaging must be consistent and repetitive.

Leadership. Participants interpreted the role of leadership as establishing and maintaining organizational expectations, goals, and norms to support the progress of planned change. They felt interactions with executive leadership influenced their ability to effectively and concisely communicate change with their teams, and that collaboration was an important aspect of leadership success. For example, PM3 stated,

Sometimes executive leadership may not have the best grasp of—when a larger scale change is implemented—how it's going to come out, out in the field where we are interacting with potential students and with partners, [or] how it's going to be perceived [by others].

Furthermore, PM2 voiced, "A key indicator from a leadership standpoint [is] being able to assess each department after changes have been implemented, that way [we] get a chance to see the results from the change."

The managers also noted specific challenges when leading planned change. PM3 said, “I definitely notice like a flurry of activity from executive leadership as soon as there is a big planned change... rolling down. And it puts a bit more pressure on... the lower level management like myself.” PM2 expressed, “I still think that, as a leadership team, we are not clear, concise, and consistent on anything. We’re trying to do too many things at one time.” PM3 also verbalized, “I had ... the feeling [that] I didn’t have an opportunity for input or the decision was being made regardless of what we know is happening in the field based on feedback.”

Putting these perspectives together, a main idea related to leadership was that leadership’s role in change management is to accept change and then lead it by communicating, executing, and controlling the change. Staples, Hulland, and Higgins (1999) found that effective communication from all levels of leadership, coupled with operative expectations, impacts remote managers’ ability to drive change. One idea not verbalized by the managers was the importance of transformational leadership in garnering discretionary efforts from employees during planned change. Burns (1978) stated that transformational leadership inspires organizational change. Having transformational leadership enables remote managers to connect field representatives with the organization’s mission and vision during change (Burns, 1978).

Organizational culture. Organizational culture plays an important role when implementing planned change. Remote managers play an integral role in managing the culture of the organization. Leadership must navigate not only the culture of the

organization, but also the culture of the department and subcultures of their teams.

Problems connected with encouraging a positive organizational culture may stem from the independent nature of working in remote environments. The idea that autonomy may not always be best was voiced by PM2, lamenting that “When change is introduced, it’s like here is the ball, go run with it. And I think [this] is a deterring factor of effective change in any organization.” Related to the idea of a disconnect, PM3 noted,

I am not sure if this is [because of] being remote or just being out in the west, [but] it’s a very different type of region out here, where potential students have different expectations. There’s a little bit of [a] lax[environment]... [compared to] the east coast.

Finally, the idea that change itself can be a difficult construct was also expressed. For example, PM2 expressed being wary of, “The uncertainty of the... whole concept of change... For me, if [the change is] not understood... I can’t communicate it; I can’t translate it to the team...”

The main ideas related to organizational culture that emerged from data analysis were that interactions between leadership and remote employees within the organizational framework molded perceptions of organizational culture, and that remote managers, in particular, each have an individual ethos related to their responsibilities for shaping organizational culture that influences their own perceptions and behaviors. In addition to leading changes in functions and processes, remote managers influence change in the university’s culture. Greer and Payne (2014) found that for change to be

successful, the culture also has to shift organizationally and departmentally. Activities designed to positively shape organizational culture should focus on embracing new norms, behaviors, and expectations (Greer & Payne, 2014), and may benefit from including aspects of transformational leadership (Burns, 1978), especially during change management initiatives.

Process change. Implementing and assessing new processes designed to connect different systems within the department and the university falls upon the managers. Their perceptions of new processes influence remote employees' acceptance of change. They discussed being tasked with ensuring the team fully embraces and adopts new processes. Participants shared their thoughts on process change. For example, PM3 expressed, "I think people may not let go of the old way of doing things before they start to embrace the new way of doing things." PM3 also noted,

I would love to see one of these plan changes come down the pipeline [that] says... we're going to stop doing this on Wednesday, and... as of next Monday, we're gonna' start doing it this way. It's always [been] 'stop doing this now, and you should've started to do this yesterday.

PM2 added,

Let's say... there is a new process... to contact clients to schedule meetings. [Field representatives still need to] collect leads... [and] conduct events... If we're throwing all these things [at them] at one time... and we're not consistently evaluating or inspecting these new processes, we are just going to flounder.

The managers also considered the role technology plays in process change. Technology has been described as a barrier to positive planned change. The managers recounted how technology often acts as a barrier to the successful implementation of planned change. With technology as the principal form of communication for remote field representatives, managers, and leadership, technology challenges have a more profound effect on these employees. PM3 indicated that “The biggest obstacle [to change] is technology... it just seems that a lot of times we have these big changes set up, but there is some glitch in either the software platform or a new technology we are using.” PM2 highlighted the “... importance of being able to incorporate technology [into the change process] and PM3 followed with, “If the technology does not work, [the change process] just comes to a screeching halt, and it’s like ‘wait, why are we doing this? This does not work.’”

A construct related to process change that emerged from my data analysis was the role of leadership to support team members while adopting new processes, systems, and structures. This construct is related to the works of Baker, Walsh, and Marierison (2000), and Cerne, Jaklie, and Skerlavai (2013). According to Baker et al., planned change is only as good as process change, and the success of process change is contingent on remote managers. Accordingly, process change is the connection between leadership’s ideas and the mechanisms to alter behavior (Cerne et al.)

Process change is interwoven into planned change management competencies (Baker et al., 2000). Systems theory recognizes the relationship between process change

and the organizational environment (Morgenson et al., 2015). Remote managers direct the structure, roles, and competencies of the change in order to achieve organizational goals. The success of process change relies on the interdependence between remote managers and the organization.

Additionally, systems theory explains the relationship between technology and remote employees. Technology keeps remote employees connected to the university and provides the tools and resources needed to complete work functions (Greer & Payne, 2014). A break in technology prevents change from occurring. Technology keeps different systems, subsystems, and departments connected to the university system. When one system does not operate properly, planned change suffers (Anderson, 2012). Greer and Payne (2014) found that technology was one of the biggest barriers to effectively performing job related duties for remote employees. Furthermore, Greer and Payne (2014) identified technology gaps as a barrier to productivity.

Team dynamics. Managers outlined ways team dynamics impact remote teams during planned change. When positioning the team above the individual, team dynamics support the acceptance of change. Playing to the dynamics on their individual teams, leadership is able to overtly manage the narrative of change. PM3 shared,

Right after a big change is coming, everybody who has relationships with others on the team will call each other and say, ‘Do you know what’s going on?’ or ‘Why this has been planned?’ or ‘Where do you think this is coming from?’ or ‘How are you going to tackle this?’

PM2 added,

Peer pressure is one of the biggest [components of planned change] ... I think... new folks look to... veterans for suggestions, for encouragement... [However,] some of your newer people may take the change and run with it because they are not accustomed to the old ways of doing business. But I think your veterans, your leaders within the team or... the organization, when others see them responding to the change, I think others will follow suit.

Participants also encounter negative team dynamics in their role as a remote manager. To prevent negative dynamics from spreading to the broader team, leadership must deploy strategies designed to mitigate damaging behaviors. Participants shared two experiences of negative team dynamics during change. PM2 lamented, "I think it is very hard as a remote employee, because there's not a lot of comradery, except over the phone. And when you're super busy, you just don't talk to people." PM3 added,

Really negative team dynamics, with gossiping, really [having] a negative effect on the team... eventually leading to some separations with the university. And then the dynamics switched. It seemed to be more positive... [which created] a higher level of expectations for the remaining team members... [to] work a bit harder and be a bit more strategic.

The idea that the division was currently experiencing team consolidation was explored further by PM3, saying,

The relationship and the trust I have with the other two RMs... we always try to

connect, so that we have the same voice and we're delivering the same message.

And that takes a lot of time, especially since we are getting to know each other.

The concept related to team dynamics that emerged from data analysis was leadership empowers the team to pursue their purpose within the organization by empowering individual team members to embrace change. The role of leadership is to facilitate team performance (Barnett & McCormick, 2012). Remote managers can use team dynamics to promote innovation, foster organizational agility, and encourage the adoption of new norms, goals, and expectations (Barnett & McCormick, 2012).

The ability to leverage team member attributes to motivate change is an important leadership tool (Barnett & McCormick, 2012). Remote managers also support their teams during change by interpreting information and performance goals from executive leadership. When communications between the field team and remote managers are perceived as positive, change is more likely to occur. Team adaptation of transformation is dependent on the emergence of shared positive perceptions of planned change that initiated with leadership.

Summary of remote manager focus group findings. Remote managers are the conduit to change. Despite not being directly involved in strategic planning, remote managers execute change objectives. Ten themes emerged during manager focus groups: collaboration, communication, buy-in, administrative tasks, process change, affect, organizational culture, team dynamics, and leadership. With the addition of change

management, the 10 themes identified for remote managers are consistent with the themes identified by field representatives.

Both participants identified communication as the most important theme of planned change. No other theme had a greater influence on remote managers undergoing planned change. To enable change, organizations need an effective and consistent communication strategy that can be deployed to the entire department. The findings from remote manager focus groups provided a basis for individual interviews with these managers. The purpose of the individual manager interviews was to elicit greater understanding of what these managers go through while managing planned change within their departments.

Individual Remote Manager Findings

The three remote managers were invited to participate in an individual interview at the conclusion of their focus group and two accepted. The purpose of the individual interviews was to discuss themes that were revealed in the focus groups and then connect them to the original research questions. Examples of manager comments are presented below, organized under the five research questions.

Research Question 1: What organizational factors influence the implementation of planned change at the level of field representative remote employs at the university?

Communication and buy-in were the guiding principles of planned change for remote managers. They described the importance and impact of providing effective communication and securing buy-in during planned change. For example, M2 stated,

The biggest conversations [and] the most important deadlines, [I try to] have a discussion in a weekly, regional meeting... then I will usually reiterate [the information] with an email that says... in the subject, deadline EO day or EOD [end of day] whatever date its due.

PM3 added,

I think it is very important to take the time to explain to the west why we're planning a change and... the overall executive summary [for the change] before we [present] the plan [that shows] how the change is going to occur.

Martins and Coetzee (2009) found that communication is one of the most important function for managers during planned change. Before a change can be communicated to team members, managers must understand why the change is being made, and how it will be implemented. Put simply, when managers do not understand the directive, they cannot properly articulate it to their team (Barnett & McCormick, 2012). For the change strategy to be effectively filtered down to the teams, remote managers also must be able to articulate the change.

Another construct related to organizational factors shared by remote managers was buy-in as a driver of planned change for them and their teams. Securing buy-in is necessary to execute planned change effectively. PM2 asserted that, "planned change is more successful ... when you get buy-in from team members or... across teams... [or] when you have those key influencers, that buy into change, and they're showing results." Combining the importance of communication and buy-in, PM3 added, I think buy-in

starts with explaining why we are planning change... over-communicating is key... in planned change.” Remote managers illustrated their support for planned change to their teams by modeling change and incorporating change objectives into meetings and communiques. Not mentioned by the remote managers, buy-in can be encouraged by modeling the desired change for a team members who have informal power (Battilana & Casciaro, 2010).

Research Question 2: What team dynamics influence the implementation of planned change at the level of field representative remote employees at the university?

Team dynamics plays an integral role during planned change. Managers discussed how individuals influence the team to adopt new behaviors, norms, and goals. For example, PM2 charged, “I think [the use of] peer pressure [presents] a huge, huge opportunity for [promoting] change.” PM3 acknowledged the benefits of “Having a team with a few newer employees [as] they’re always eager to learn more and they [influence the] dynamic of the team, [and] everybody is talking to each other... all the time and I love it.” There was also a description of how important positioning change initiatives can be for teams in guiding desired goals. For example, PM3 said, “I start by making sure all the key players... can understand not only what the problem is, but how we’ve thought of the solution, and [how] we’ve addressed all of those who, what, when, where, and why [questions].” Malhotra et al. (2007) stated that establishing trust through the change process provides a foundation for remote teams to accept change. For team dynamics to

drive planned change, all leaders and managers should support communication and collaboration across teams.

Lewin's theories of organizational change are interwoven in the managers' perceptions of team dynamics. These theories address how individuals, teams, and organizations undergo change. Participants discussed the evolution of their teams adapting to new behaviors through informal leadership and change strategies.

Many university activities are conducted through informal relationships. Therefore, informal leadership can influence organizational behaviors such as learning, collaboration, communication, and leadership (Huning, Bryant, & Holt, 2015). Informal leadership channels spread information and connect team members through informal relationships within the organization. Remote manager rely on these informal social structures to promote the acceptance by using "peer pressure" or modeling success to their peers.

Action research is a practical approach to how teams adjust to their new goals, behaviors, and environment (Adelman, 1992). Benefits of applying action research include allowing teams to participate in the decision-making process during change including providing feedback and sharing best practices. Employing the tenets of action research could enable managers to exploit team dynamics to ease the planned change process. Furthermore, managers leveraged individual relationships with representatives to broaden change adoption among their teams by engaging their feedback and experiences in the decision-making process.

Lewin's theory of group dynamics also is applicable because remote managers emphasize that the needs of a team are greater than the needs of individual team

members. Medley and Akan (2008) stated that planned change is about groups, and for change to occur, the entire team needs to adapt. These managers described the positive shift that occurred in the team dynamics once the change was embraced by the group.

Research Question 3: What leadership dynamics influence the implementation of planned change at the level of field representative remote employs at the university?

Remote managers rely on leadership to pilot change. They stated that they must fully understand the goal and objectives of change before they can share them with their team. Remote managers are not necessarily part of the decision-making process, but are responsible for the execution of change activities. As indicated by participants, it is important that all managers approach changes from the same perspective so team members do not get confused. According to PM2, "...our division VP has... constantly and consistently told us... [That] the three of us have to be doing the same things. We have to [be] communicating the same things all the time." PM3 also related,

I am always the person saying What if? What if this happens? What if that happened? ...I try to foresee... bumps in the road, so that we can minimize them up front and plan for them. That's probably my biggest goal... otherwise I'm usually just listening and absorbing the reason for change.

Mahlhotra et al., (2007) found that remote managers should have a strategy that includes a plan of communication, engaging informal team leaders, and communicating an operating agreement that aligns with change objectives. The remote managers' role is to apply norms, goals, and expectations to their respective teams.

Burke-Litwin's theory of change seems to also apply to remote managers' experiences and perceptions of change as described by Martins and Coetzee (2009). While not specifically focusing on Burke-Litwin's theory of change, Martins and Coetzee's research highlighted the cause and effect relationship between remote department performance and leadership behaviors. For remote managers to be effective change agents, they have to go through different stages of accepting change norms themselves.

Research Question 4: How do field representatives at the university experience planned change?

Remote managers discussed perceived factors that influence how change is perceived and why change is embraced by some remote team members and not others. While tenure was not an identified theme among the remote managers, there was an acknowledgment that less experienced employees may be more receptive to change. PM2 stated, "Because the folks that had been here less than two years [are] not [in as] big a routine... [as] someone who has been here five years plus... I think it's easier for [newer employees] to change." Overall, it seemed that the combination of willingness and skills were important for the smooth implementation of planned change. According to PM2,

[If] there is a will [to make the change], if you are willing to do it, and you have the skills to do it, you will be able to do it. If you have the skills and you're not willing to do it, you won't do it. If you don't have the skills but you're willing to do it, you can be trained.

Additionally, on the willingness factor, PM3 shared, “No one wants to do something if they don’t understand why they’re doing it in the first place.”

Wittig (2012) indicated that employee attitudes, team dynamics, and employee/manager relationships are significant factors influencing perceptions of planned change. Resistance to change is one of the primary reasons change fails (Wittig, 2012). Remote managers need to understand that field representatives’ responses to change are affected by a number of variables. Two of the variables that need to be addressed by leadership are field representatives’ level of participation in decision making, and their acceptance of or resistance to change (Wittig, 2012).

Research Question 5: How does the planned change process affect the organizational climate from the perspective of the university field representative remote employees?

During the individual interviews, remote managers did not discuss organizational climate in regard to the university as a whole. Instead, they emphasized the importance of implementing processes, goals, and norms during change. Although field representatives identified organizational climate as a primary theme of planned change, remote managers were more focused on the mechanics of change, the planned change activities. It seemed that, from remote managers’ perspectives, organizational culture was not a measurable metric during change, and hence was a secondary theme. Particularly given the VP’s emphasis on organizational culture as a driver of planned change (see VP interview section, below), the theme of organizational climate from the perspectives of remote

managers, would be a rich topic for future research on the relationship between organizational culture/climate and remote middle managers for organizational effectiveness and organizational development.

Summary of Remote Manager Findings.

During focus groups and individual interviews, remote managers described their experiences and perceptions during planned change. Ten themes were uncovered during focus group interviews and reinforced in individual discussions. Remote managers were interviewed to determine their perspectives of implementing planned change for field representatives.

Manager focus group and individual interviews found all themes important for executing change and were positively related to the successful implementation of planned change. Managers indicated that from their perspective, communication was the most important theme for driving change. However, findings illustrate that each theme's role in change is interdependent. It was interesting to note that although organizational culture was a theme, managers and field representatives interpret it differently. Organizational culture emerged as an important theme as an indicator to how change is perceived. Conversely, the theme of change management was an important theme for the remote managers, and not for field representatives. These findings suggest that remote managers are less concerned with how change may or may not be recognized, but more concerned with how the change strategy is executed. Again, connecting change processes to

organizational vision may be a missing link for connecting change participants up and down the chain of command.

The purpose of the individual interviews was to gain a deeper perspective of the remote manager's role in planned change. The themes uncovered in the focus group were the same as those found in the individual interviews, with the exception of organizational culture, which was not discussed as a contributing theme in individual interviews, but was identified as a theme during focus group interviews. The next section considers change from the perspective of the VP who is responsible for the overall change strategy.

Vice President Interview Themes

The VP discussed planned change from the perspective of executive leadership. The 30-minute interview took place over the phone. Originally, the interview was planned for 60 minutes, but it ended early due to scheduling conflicts. I was unable to schedule a follow-up interview.

Leadership helps design innovative change strategies that will increase productivity and drive revenue. The VP establishes the foundation of goals, behavior norms, objectives, and expectations of the change for the remote team. The three main themes unpacked during the VP interview were organizational culture, communication, and change management. Each theme was cited as contributing to the success of planned change and interacting with the other themes. The themes and relevant representative quotations from the VP are presented below.

Organizational culture. From the VP's perspective, organizational culture is the principal driver of change. As explained during the interview, culture guides the shift in organizational behavior from the perspective of executive leadership. Following are some of the VP's comments regarding organizational culture:

Corporate culture is most important during planned change—not pay, or communication, or collaboration... Culture is the potential enabler of good change, but when change is perceived as negative or shocking, you can step on something and it explodes... buy-in for change comes from culture and how you are able to shift culture during change.

The responses indicated that the VP believed that altering the culture of the organization during change is what leads to positive planned change. Such a culture shift comes from sharing goals and operating values with employees, and aligning the team behind the vision of change so the implementation strategy can be accomplished.

When an organization is implementing planned change that will alter fundamental aspects of its operating strategy, it needs to start with significant changes at the top of the organization (Giberson, Resick, Dickson, Mitchelson, Randall, & Clark, 2009). The operational change strategy determines the criteria for the culture shift. Organizational culture defines acceptable and non-acceptable behavior during change (Giberson et al., 2009). This can be the determining factor of the success of change, as it correlates to executive leadership (Latham, 2013). As discussed during the interview, shifting organizational culture takes precedence over any other change considerations.

Systems theory proposes that the ability to modify organizational culture to fit the new norms and inspire new behaviors is essential for change (Lantham, 2013).

Organizational culture emerges from the VP's beliefs and interactions regarding the shared goals, values, and behavioral expectations that connect remote employees to the organization (Latham, 2013). The goals are then passed down through the university and communicated to departments, teams, and individual employees. Thus, a paradigm shift in an organization stems from organizational behavior from the perspective of executive leadership.

Communication. The VP is responsible for creating a communication culture that fosters positive, two-way communication that takes into account internal hierarchies and communication channels. Communication planning enables the VP to shape the information that flows to the team, thereby modifying expectations and goals. The VP's comments regarding communication included,

Change is designed and communicated by leadership... communication planning entails what are you going to change and... how it is going to be communicated, and making sure [the] communication plan has the *how* and *when* of change... I do not email change in one email, but rather put together change with hints, then a team meeting, and a follow-up email with information about [the] change and [the related] expectations... with change, I plan out communication [by determining] who needs to know and when they need to know it.

Communication was identified as an important theme that allows change to filter down from the top of an organization. Using a carefully considered plan that indicates how and when change is communicated helps ensure that the information shared is effective and meaningful. A premeditated strategy outlining the frequency and priorities of required messages is an important aspect of leading change (Lantham, 2013). As discussed during the interview, communication should address what the change is, the goals of the change, and the expected norms and new behaviors related to the change.

Adelman (2012) stated that executive leadership needs to be approachable and promote open communication that is built upon employee trust. The VP puts together a change management strategy that includes informal and formal communications to ensure team members were aware of what was happening. Applying the Burke-Litwin model of change (1992), leadership implements specific communication norms designed to transform employee behavior and expectations. Thus, communication influences organizational culture causing a shift in behavior for remote managers and field representatives.

Change management. The concept related to change management that emerged from the analysis was that executive leadership spearheads planned change from the top down to execute the vision, processes, and forces that enable change to transpire. The VP proposes deliberate and controlled activities that are designed to change the direction or goals of the remote department. The VP's sentiments regarding change management included

[I try to] be respectful of [how] good and bad news [is handled]. Situations have come up where promotions are released before the person knows she is promoted, and same situation with layoffs... leadership is aware of the roles and responsibilities of employees affected by the change [and the] people who implement change... there are two types of change that I implement, overt change and deliberate and controlled change that people do not realize... is happening.

Change management is an essential function when implementing planned change.

It needs to be ingrained in every initiative designed to modify goals, norms, and behaviors. The VP assesses and analyzes the effect of change activities on the team. Lewin's three-step change management theory provides a foundation for changing behavior (Adelman,1993).

Lewin found that the rate of change is directly proportional to leadership involvement in the change process (Adelman, 1993). Furthermore, how and what information was communicated is at the behest of leadership. Lantham (2013) added that leadership's actions should be consistent with the mission, goals, and vision of change.

Summary of Vice President Interview Findings

Planned change is continuous in the present marketplace. The VP strategically projects and leads planned change to the desired organizational goal. When new processes, systems, or visions are announced, the VP demonstrated a commitment to supporting the various complexities of change. A strategy and change vision from executive leaderships gives the team a road map for implementing the desired goal.

Planned change was not always deliberate and large scale; the VPP employed overt change frequently as a way to minimize the effects of significant change on the team. The use of overt change facilitates change in the organizational culture empowering the team to embrace planned change. Organizational culture, from the perspective of the VP, drives the team's willingness to fulfill planned change.

Overall Findings

An assessment of the narrative yielded three different perspectives of planned change: from the remote field representatives, managers, and the VP. Data collection produced 11 themes that contributed to the acceptance and execution of planned change. Remote employee perspectives of planned change was broken down by job function, theme, and then overarching research questions, with the exception of the VP, whose time constraints limited the interview. Each perspective highlighted varying interpretation of how remote employees experience and participate in planned change.

The research indicated that themes are interchangeable by job function; however, communication and organizational culture were recurring themes for remote field representatives, managers, and the VP. Table 2 presents the themes that emerged from both the focus groups and individual interviews from the perspectives of field representatives, managers, and the VP.

Table 2.

Combined Participant Themes

Theme	Field representatives	Managers	VP
Admin tasks and deadlines	Emergent theme	Emergent theme	n/a
Buy-in	Emergent theme	Emergent theme	n/a
Change management	n/a	Emergent theme	Emergent theme
Collaboration	Emergent theme	Emergent theme	n/a
Communication	Emergent theme	Emergent theme	Emergent theme
Affect	Emergent theme	Emergent theme	n/a
Leadership	Emergent theme	Emergent theme	n/a
Organizational culture	Emergent theme	Emergent theme	Emergent theme
Process change	Emergent theme	Emergent theme	n/a
Team dynamics	Emergent theme	Emergent theme	n/a
Tenure	Emergent theme	n/a	n/a

Note. n/a indicates that the designated theme did not emerge in the interviews with the indicated participant group.

The themes corroborated and deepened my understanding of perceptions of remote nonfaculty employees. Four important implications emerged from the thematic analyses. The implications include (a) a clear and concise communication strategy needs to be deployed that accounts for managers and remote employees being in various stages of change all at the same time, (b) organizational culture is an indicator of successful change, (c) change needs to be strategically modified and managed to include remote employees and their job functions, and (d) top-down, bottom up, and across/lateral collaboration reduces barriers to change management. Additionally, the findings indicated that each participant category had its own particular set of priorities that needed to be addressed for positive planned change to occur.

In my reviews of the literature I found no research that addressed remote nonfaculty employees undergoing planned change in a higher education setting. My findings, therefore, begin to fill a gap in the professional literature on planned change, especially where remote nonfaculty employees are involved. The themes uncovered in this research provided the basis for a policy statement addressing strategies to engage higher education, remote, nonfaculty employees through planned change at the site where the study was conducted.

Section 3: The Project

Introduction

For this project study, I explored perceptions and experiences of remote field representatives, managers, and a VP concerning methods of successful change and the development of strategies to reduce potential barriers. This section includes the introduction of a policy statement that resulted from the findings of my study (see Appendix A). My policy statement proposes competences for the inclusion of remote employees in planned change activities, opportunities for cross-team collaboration, and approaches to increase productivity during planned change. I then describe the project goals, objectives, and rationale; present a review of the literature; and offer a description of the project.

Description and Goals

The project study that evolved from participant interviews is a policy statement designed to reduce potential barriers, strengthen change adaptation, and increase productivity during planned change. Hull (2010) stated that crafting a policy statement establishes the core values of planned change for an organization and its employees. The policy statement serves as a “guardrail” to ensure open communication and collaboration between geographically dispersed employees and leadership (Hull, 2010). My policy statement addresses techniques to increase top-down, bottom-up, and cross-lateral collaboration and communication during planned change. The policy statement will be shared with the VP of business development as a resource to modify existing change

management practices. My final project includes a policy statement with recommendations for (a) developing clear and concise communications strategies, (b) lowering potential barriers to change, (c) encouraging involvement of remote employees in change management activities, (d) reducing stress and anxiety, (e) fostering connectedness to the organization, and (f) creating a unified remote team.

Recommendations resulted from the findings of focus group and individual interviews of remote field representatives, managers, and the VP.

Rationale

Extensive research has been performed independently on organizational change, remote employees, and nonfaculty employees who work in higher education; however, there is very little information available on remote nonfaculty employees who are undergoing organizational change in a higher education setting. My project study was developed to understand experiences, latent inefficiencies, and challenges of implementing planned change for geographically remote employees who serve as field team members at a university. Additionally, considered were perceptions of managers and a VP who were also undergoing planned change. It was crucial to explore the leadership's perceptions in order to present a policy statement that would alleviate some of the barriers associated with planned change. Understanding the perspectives of all participants may prevent internal and external barriers that can be associated with planned change.

Barr and Turner (2013) remarked that with an increase in the enrollment of nontraditional students in public and private nonselective higher education, traditional higher education could not maintain programming and accommodate student demand due to reduction in budgets. As a result, for-profit online higher institutions flourished. Similarly, for-profit online education institutions are facing increased complexities such as increased scrutiny from regulatory bodies, competition in attracting and retaining students and faculty, the need to create curriculum that builds career paths, and high demand for workforce development. I. Allen and Seaman (2010) surmised that employers' continued demand for quality online education is propelling for-profit higher education institutions specifically to include workforce development initiatives in their strategic growth plans. These factors are contributing to and driving organizational change to meet these demands (Smith, 2015; Soliz, 2016; Wilson, 2015).

Barth (2013) observed that organizational change in higher education institutions is process oriented and managed in a top-down, bottom-up manner, lacking various types of stakeholder support. My research illustrated five themes that were consistent with this statement: (a) team dynamics, (b) leadership dynamics, (c) organizational climate, (d) stress and anxiety, and (e) communication.

The findings of this project study provide understanding of the various organizational factors that influence remote employees' perceptions and participation in planned change at the university. Furthermore, the findings offer insight into the relationship of a geographically dispersed field team and its leadership. The rationale for

this project study, which was supported by professional literature regarding change management and remote teams, is that there is a need to develop a policy statement that increases the connectedness of geographically dispersed employees to the university, lowers barriers to planned change, and increases productivity. The following literature review was conducted as a foundation for developing a policy statement that would serve as a research project based on my data analyses and findings.

Review of the Literature

Currently, the literature does not include a policy statement encompassing planned change for geographically dispersed nonfaculty employees who are employed in for-profit higher education settings. The literature review was conducted to interconnect a policy statement prescribing best practices for change adoption among a geographically dispersed team. Based on the findings of participant interviews, the literature review encompassed the following search terms: *policy statements and white papers; bottom down, top up, and cross lateral communication amongst remote teams; remote team dynamics, collaboration between geographically dispersed employees, leadership dynamics and remote teams, stress and anxiety, organizational culture and remote departments, and strategic change management*. Saturation in the literature was reached using the following databases: Academic Search Complete, Business Source Complete, Education Research Complete, ERIC (Education Resources Information Center), Emerald Management Journals, and ProQuest. There were two purposes for the literature review.

Vertical, Cross-Lateral Communication

Communication channels for geographically dispersed teams are of paramount importance to the successful implementation of planned change. O’Leary et al. (2014) found that frequent communication familiarizes remote employees with tone, meaning, and language while reinforcing the shared identity of the team. Communication behavior, among remote teams, is based on perceptions including those related to the use of language, symbols, and attitudes of communiques (O’Leary et al., 2014). In the following section, I consider existing literature establishing communication as a driving force of the policy statement.

Bottom-down communication. Waters (2015) stated that leadership needs to employ a variety of methods to illustrate what good looks like during change and to maintain communication. According to S. A. Allen and Vakalahi (2013), it is the responsibility of leadership to establish communication norms. One recommendation is that remote teams and leadership outline a strategic communication plan or policy, specifically identifying how vital information is communicated (Waters, 2015). S. A. Allen and Vakalahi emphasized that remote teams have a shared communication responsibility in order to accomplish their stated goals. Open communication policies (S. A. Allen & Vakalahi, 2013) established in advance can deter potential conflicts resulting from miscommunication (O’Leary et al., 2014). Belanger, Watson-Manheim, and Swan (2013) described bottom-down communication norms as contributing to perceptions that

remote employees are always available to access electronic mobile devices regardless of time of day or location.

Communication strategies that support impromptu interactions between leadership and remote employees foster positive reactions (Golden & Fromen, 2011) and empower remote employees to take ownership of understanding directives (Birnholtz, Dixon, & Hancock, 2012). Remote employees who trust leadership are more likely to implement communication directives without multiple communiques (Vega, Anderson, & Kaplan, 2015). Golden and Fromen (2011) suggested that top-down communication is not as impactful when interactions are limited in both quantity and quality. Alternatively, the literature indicates that remote departments that have dedicated communication policies with channels to leadership have richer dialogue (Golden & Fromen, 2011) and are thus more likely to be active participants in planned change (S. A. Allen & Vakalahi, 2013).

Cross-lateral communication. Waters (2015) stated that employees who work remotely outperform those who are tied to a specific location. One reason for this is that geographically dispersed employees are motivated to communicate continually (Basile & Beauregard, 2016). For example, Berry (2011) found that communication norms among geographically dispersed teams encourage team members to pursue information when problems or confusion arise. Virtual teams have their own communication subculture (Lee & Chang, 2013). Chang, Hung, and Hsieh (2014) found that geographically dispersed teams' subculture is inconsistent with face-to-face teams; virtual teams have

the freedom to engage in meaningful dialogue and are not relegated to chain-of-command communication policies during planned change (Waters, 2015; McNaughton, Rackensperger, Dorn, & Wilson, 2014).

Interpersonal trust in remote teams is a crucial success factor in relation to communication policies as catalysts for planned change (Chang et al., 2014). According to Bartelt and Dennis (2014), the social subculture of virtual teams influences how teams communicate and the degree to which teams embrace communication policies. Communication policies are developed over time, derived from continuous and repetitive direction from leadership (Kossek, Thompson, & Lautsch, 2015) but evolved into subconscious team patterns (Bartelt & Dennis, 2014). As communication norms resulting from policies emerge among geographically dispersed team members (Berry, 2011), they form their own communication competencies (Chang et al., 2014).

Unlike traditional teams, remote teams lack the ability to read verbal and nonverbal cues (Pitts, Wright, & Harkabus, 2012). According to Pitts et al. (2012), nonverbal cues are important sources of information during face-to-face communication and are just as important as verbal communication. Berry (2011) found that teams who communicate solely through technology share many of the same communication dynamics that are found in face-to-face teams, including the ability to notice nonverbal cues. Fonner and Stache (2012) indicated that a proactive communication policy can be used as a tool to manage productivity and workflow during planned change.

Communication preferences among remote teams (Kossek et al., 2015) facilitate increased top-down and bottom-up communication (S. A. Allen & Vakalahi, 2013).

Communication Technology

According to Torten, Reaiche, and Caraballo (2016), advancements in communication technologies have enabled remote employees to use communication dimensions that were once unavailable (Vayre & Pignault, 2014). New technological innovations have increased communication channels (Waters, 2015), making it possible for once inaccessible employees to attend onsite meetings remotely, participate in group discussions, access documents on internal servers, and form meaningful professional relationships (McNaughton et al., 2014). These technological communication conduits provide opportunities for geographically dispersed employees to contribute to change activities that were once out of reach (Kossek et al., 2015).

Remote employees want and need to be more involved in change processes. Belanger et al. (2013) indicated that leadership has varying preferences concerning the use of technology for the engagement of teams and individual employees. Communication among remote employees is increased when technology is collaborative (Morgan, Paucar-Caceres, & Wright, 2014) and mobile devices are linked to professional platforms needed to fulfill job requirements (Meltem & Hassan, 2016). The literature in this discussion and the discussion above illustrates the importance of effective and efficient communication policies for remote departments undergoing planned change.

The following section connects the literature to the dynamics of remote teams experiencing planned change.

Remote Team Dynamics

Lee and Chang (2013) stated that trust, communication, leadership, and a shared mental model are factors that contribute to successful team dynamics. Team dynamics are essential to acceptance and implementation of change (Georgiadis, 2015). Planned change results in a shift in team goals, policies, and norms to align with the organizational strategy (Guetter & Vandenberg, 2013). Markova and Perry (2014) argued that teams, including virtual teams, develop “their own norms, cohesion, and compliance expectations within change management policies” (p. 430). The majority of teams lack formal policies to compel each individual member to contribute equally (Markova & Perry, 2014). As a team evolves during change, policies emerge to acknowledge required change activities (Markova & Perry, 2014), with each team member expected to contribute (Foo, 2011).

Georgiadis (2015) suggested that change policies aligning positive team dynamics foster collaboration, increasing productivity and efficiency. Guetter and Vandenberg (2013) maintained that in order for planned change to be impactful, organizations should implement policies engaging group-think dynamics during strategic change implementation. Actual group dynamics emerge when members are able to start organizing and structuring themselves to accomplish a stated goal (Costa, Passos, & Bakker, 2014).

During planned change, virtual teams experience a myriad of influences that affect individual perceptions of change and adaptation of new policies (Hartigh, Gernigon, Yperen, Marin, & Van Geet, 2014). Individual members seek to satisfy their own needs by participating in change (Markova & Perry, 2014). Internal peer pressure to adapt (Georgiadis, 2015) to change has been identified as a leading dynamic (Georganas, Tonin, & Vlassopoulos, 2015). Additional influences include desire to conform (Mitchell et al., 2015); internal “need” to be seen as successful among peers (Collins, Gibson, Quigley, & Parker, 2016); and changing work identity (Yilmaz & Pena, 2014).

Employees’ sense of work identity is based on team dynamics (Yilmaz & Pena, 2014). According to Privman, Hiltz, and Wang (2013), geographically dispersed teams may form subgroups of virtual team members who have similar experiences during change. Yilmaz and Pena (2014) suggested that employees classify themselves in groups on the basis of commonalities or shared beliefs. Remote subgroups may share characteristics (Privman et al., 2013) of geographical region, tenure, shared personal commonalities, or mental model (Lee & Chang, 2013). Yoon and Kayes (2016) asserted that connected subgroups with a stated goal and purpose increase team effectiveness and positive outcomes. The self-perception of individual members contributes to the overall identity of the team and its interpretation of change policies (Yoon & Kayes, 2016). Although cultural and demographic diversity influence team dynamics, they were not considered for this project study.

Plavin-Masterman (2015) stated that group dynamics are actually social structures that operate within an organization. Group members often search for a shared experience or likeness, outside of the stated group goal, to form a social connection that propels the group forward (Au & Marks, 2012). Yoon and Kayes (2016) suggested that informal social interactions among remote team members create positive group dynamics. These social interactions increase collaboration, productivity, and efficiency, leading to successful policy acceptance (Plavin-Masterman, 2015).

This section of the literature review focuses on collaboration and group dynamics. Important themes include the importance of communication for remote employees' effectiveness, the need for leadership to leverage technology and a variety of communication technologies to encourage participation, the importance of communication frequency (both laterally and vertically in both directions), and the importance of group dynamics, even when the group is not geographically consolidated. The following section connects the literature to collaboration policies among remote teams experiencing planned change.

Collaboration Between Geographically Dispersed Employees

Hopen (2014) suggested that collaboration is the foundation for effective teams. The fundamental principles of effective collaboration policies occur when people "join forces to tackle a problem or make a decision, share knowledge, skills, and experience" (Hopen, 2014). According to Smith (2014) collaboration supports a greater perspective while exploring differing viewpoints, enables connections between ideas and

perspectives, and allows decisions to be made collaboratively. Geographically dispersed teams mutually make decisions often without an official change policy to guide expected behaviors and norms (Turban, Liang, & Wu, 2010).

Organizations are creating policies to foster collaborative relationships to drive innovation (Turban et al., 2010). Effective collaboration among teams has a higher potential to solve complex problems (Duysburgh, Naessaes, Konings, & Jacobs, 2012) and build trust among group members (Smith, 2014). According to Moore (2016) effective collaboration goes beyond tech savviness, as remote geographically dispersed team members need to be able to communicate effectively, with diplomacy, and convey empathy. This means moving beyond the emotional detachment of emails and work drafts (Moore, 2016), and developing relationships to reduce the uncertainty and apathy that emerges in online collaboration (Long and Meglich 2013).

Policies addressing collaboration is an indicator in organizations of cultural and behavioral changes guiding strategic thinking and sharing of new ideas (Dulipovici & Vieru, 2015). Church (2015) found that employees who telecommute lack organizational cohesiveness, but collaboration increases their connectedness to the organization. Geographically dispersed teams use differing techniques, including technology, as a means for collaboration (Turel & Connelly, 2012). Interestingly, organizations investing in collaboration technology have reported increased synergy among remote teams (Graham, 2016). Organizations are creating internal policies as a platform that brings geographically dispersed employees together to connect, communicate, brainstorm, and

share (Ferri-Reed, 2014). Smith (2014) found remote teams policies which utilize technology as a part of collaboration fostered group consensus in decision making, had higher team engagement and participation, and were more efficient achieving their goal (Duysburgh et al., 2012).

This section considered collaboration policies among geographically dispersed teams. As presented, collaboration policies are paramount for the organization and team to be successful and innovative. The following section connects the literature to policies addressing leadership dynamics among remote teams experiencing planned change.

Leadership Dynamics and Remote Teams

Madlock (2012) defined leadership as the ability to guide people towards a shared goal. Effective leadership influences organizational performance and creates higher performing teams (Madlock, 2012). Moreover, the leadership dynamic has a greater positive influence on job satisfaction and organizational commitment among remote teams (Overbey, 2013). Bertlett, Johansson, Arvidsson, and Jern (2012) emphasized leadership model's productivity, relations, quality, and commitment to goal of the organization. Leadership is considered a predictor of team effectiveness that predicated on leaders and employees developing effective relationships (Bertlett et al., 2012). Successful leaders of geographically dispersed teams place significant emphasis on planning, policies, communication, support, and availability (Overbey, 2013). Overbey (2013) found that leaders who manage geographically remote teams face additional

challenges such as time zones, geography, lack of standardized policies, and cultural differences.

It has become increasingly important for leaders to create policies that manage and handle the change process (Mehta, Maheshwari, & Sharma, 2014). Effective leaders foster communication among the team and have defined policies and processes for sharing information (Mehta et al., 2014). Change necessitates the establishment of new policies and procedures and in some cases a new strategic direction (McKnight, 2013). The creation of change management policies by executive leadership must align the goal and future vision of the organization (McKnight, 2013).

Overbey (2013) stated a positive relationship between leadership and remote employees is of particular importance, especially during times of change. Leadership may struggle to execute change management policies in remote departments (Madlock, 2012) due to a lack of buy-in, or a failure to develop rapport with the team (Mehta et al., 2014). Mehta et al. (2014) opined that the direct benefit of change must be clearly stated by leadership and in the policy, or there is a higher probability of resistance.

McKnight (2013) found that successful change is dependent on strong a leader's ability to lead and be proactive, rather than reactive. Valuable leaders are challenged to be part of the change process, by connecting the work their team does to the mission and vision of the organization (McKnight, 2013). Mason, Griffin, and Parker (2014) suggested that effective leadership requires strong self-efficacy in order drive change, but

also to hold their teams to behave in a way that is in accordance with internal values even during planned change especially when leading remote teams.

This section considered policies related to leadership dynamics as an important factor for change among geographically dispersed teams. As discussed, leadership dynamics is a catalyst for successful change adaptation. The following section connects the literature to policies addressing stress and anxiety among remote teams undergoing planned change.

Mitigating Stress and Anxiety Through Policy Statements

Bellou and Chatzinikou (2015) indicated change initiatives occur in all organizations regardless of industry. Unfortunately, change evokes nervousness and anxiety in remote employees (Maruyama & Tietze 2012). Employee reactions to change may range from uncertainty and anxiety to positively embracing a new reality (Bellou & Chatzinikou, 2015). Devi (2011) described stress is an internal response to a situation which precedes emotion, mental, and physical changes. Organizations address employee stress and anxiety through interventions, such as policy statements (Bakker, Oerlemans, & Brummelhuis, 2013). Policy statements provide employees with resources to support change adaptation and desired behaviors (Laschinger, Wong, Cummings, & Grau, 2014).

Brock and Buckley (2012) suggested a primary concern in organizations undergoing change is stress and anxiety that is why organizations are investing in resources to manage stress levels. Policy statements outlining desired behaviors and expectations enable individuals to attain goals, perform their daily functions, and

meaningfully contribute to teams (Maruyama & Tietze, 2012). A policy statement mitigates feelings of uncertainty while providing opportunity for remote employees to engage leadership (Brock & Buckley, 2012).

Stressful work environments have been found to cause changes in employee's behavioral, physical, and mental health (Suhasini, Godnina, & Babu, 2014). Providing resources to help employees cope with the humanistic aspects of change will not only reduce anxiety, but will also lesson potential barriers to change (Devi, 2011).

Implementing interventions, such as a policy statement that promotes positive and supportive work environments can reduce the physical and mental effects employees may experience (LaMontagne et al., 2014). As Suhasini et al., (2014) found, stress and anxiety, especially among remote employees, increases when there is ambiguity and uncertainty (Cullen, Edwards, Casper, & Gue, 2014) around their primary job function and job related demands. Interventions, such as policy statements, that acknowledge motivators while encouraging employee performance are found to be the most successful change strategies for reducing stress and anxiety (LaMontagne et al., 2014).

Organizations are tasking leaders to develop and support strategies which help employees respond to stress in more “productive, healthy, and sustainable ways” (Walinga & Rowe, 2013). Devi (2011) suggested stress, during planned change, can actually” trigger passion for work, tap latent abilities and even ignite inspirations.” Stress and anxiety have been found to increase productivity (Devi, 2011). Walinga and Rowe (2013) suggested that stressful work atmosphere can be associated with high performance

and ideal productivity. Stressful environments “generate heightened arousal, which increases decision making effectiveness” (Walinga & Rowe, 2013). Hosie, Willemyns, and Lehaney (2011) considered different personality traits that enabled employees to perceive organizational stress as positive.

This section considered policy statements as an intervention to lessen the effects of stress and anxiety, an important factor for change among geographically dispersed teams. As discussed, stress and anxiety can impede change integration. However, the literature also found that stress and anxiety is associated with increased performance in certain instances. The following section connects the literature to organizational culture among remote teams undergoing planned change.

Organizational Culture Among Remote Teams

Leadership policies inspire organizational culture (Rahman, Osman-Gani, Momen, & Islam, 2015). Lester (2013) found culture derives from norms, values, and beliefs within an organization. Organizational culture influences behavior of individuals and groups, which frames of policies and processes (Lester, 2013). Moreover, organizational culture is shaped by leadership’s policies around change and their expected outcomes, norms, and behaviors of their employees (Krajcsák & Gyökér, 2013). As such, Mukherjee, Hanlon, Kedia, and Srivastava (2012) considered organizational culture as an influencer of what extent individual’s fit into a team and/or organization during times of change. Cowan (2014) suggested organizations policy statements should reflect and understand their own culture during planned change.

Organization's whose policy statement supports culture and places greater emphasis on efficiency, teamwork, and productivity provides the conditions for change adaptation (Pyoria, 2011). An organization policy that values socialization, rewards performance, and recognizes employee as part of their culture have higher connectedness, job satisfaction, engagement, and lower turnover (Mukherjee et al., 2012). Accordingly, Krajcsák and Gyökér (2013) suggested a positive personal connection to the change in policy in organizational culture and desire to be part of a department is a catalyst for effective planned change. The dynamics of a policy statement may shift an organizations or team's culture for various reasons (Kossek et al., 2015). Muscalu (2014) found that policies may positively influence culture when change management initiatives encourage and support employee adoption of new behaviors within a department or organization.

Many factors affect a geographically dispersed employee's perception of recent policy changes within organizational and team culture (Pyoria, 2011). Geographically dispersed teams develop their own subculture routed in technology, business demands, and communication styles that may not be reflected in an organizational policy statement of expected norms and behaviors (Kossek et al., 2015). Additionally, technology is the most important resource for effectively communicating and collaborating within the subculture of remote teams (Rhaman et al., 2016) however, a policy statement might put greater emphasis on face to face communication not taking into account that technology connects remote teams to each other and the organization (Pyoria, 2011). Policy statements, which are designed to shift organizational culture, should take into account

employee subculture, current behaviors, and goals that increase individual connections to the department and organization leading to successful adaption of change (Krajcsák & Gyökér, 2013).

This section considered the impact of a policy statement on organizational culture as an important factor for change among geographically dispersed teams. As discussed, organizational culture is a driving force for planned change. However, the literature also connected organizational culture with a policy statement that drives successful change adaption. The following section connects the literature to strategic change management among remote teams undergoing planned change.

Strategic Change Management

Policies around strategic change management have been receiving greater attention among higher education institutions recently due to increased competition for students, faculty, and resources (Amolia & Aghashahi, 2016). Miller and Ellis (2014) considered a policy statement, as a tool for strategic management, as a model which organizations align their current and future image, vision, and mission. Sujova and Rajnoha (2012) stated strategic change management is a basic prerequisite for subsistence in a competitive higher education landscape. Creation of a policy statement should touch on planning, predicting changes, and managing an array of complexities (Ally, Agbolade, & Adunni, 2016). Additionally, Amoli and Aghashahi (2016) suggested policy statements supporting strategic change management provide strategy for potential threats,

future opportunities, and help to estimate resources to navigate competitive environments.

Strategic change management is defined by Sujova and Rajnoha (2012) as a process of managing change within an external and internal environment, focused on structure, goals, mission, and driving forces of change. Policy statements as a change management activity consist of adapting an organizations direction, structure, and process to serve the needs of students and clients (Kang, 2015). With that, organizations influence behavior, culture, and learning style that emerges during interactions that are often unpredictable during planned change (Molineux, 2013). An educational institutions business strategy, leadership, culture, and daily operations need to align with the policy statement for planned change to be deemed successful (Amoli & Aghashahi, 2016).

Primary organizational change management dynamics include but are not limited to technology, processes, people, leadership, communication policies, culture, and resource allocation (Ally et al., 2016). Molineux (2013) found that implementing a policy statement was very difficult if strategic change goals and objectives did not address a shift in culture. Ally et al. (2016) noted higher education institutions need to be flexible with employees when deploying change strategies, as employees are the basic elements of change itself. Individuals tend to adapt to change when it is perceived as meaningful, increases productivity, and allows for innovation (Skalik, 2016). The framework for policy statements needs to manage employees and their culture resistance to change

(Cooper, Nieberding, & Wanek, 2013). Employees who react positively towards change may influence a shift in culture causing others to adapt as well (Skalik, 2016).

Primary factors in guiding a policy statement around strategic change management are leadership and culture. Hechanova and Cementina-Olpoc (2013) described Schein's (2004) theory of organization culture as the relationship between culture and leadership. Schein's theory hypothesized that organizational culture is created by executive leadership's beliefs and values and how they are shared and interpreted through an organization (Hechanova & Cementina-Olpoc, 2013). Successful change management lies with the people who are charged with leading change (Hechanova & Cementina-Olpoc, 2013).

Kang (2015) stated the policy statement should reflect leadership's strategic vision of change. Any policy statement must take into account the organizational value system, internal and external support, communication policies, and managerial structures that demonstrate executive leadership's commitment to change (Hechanova & Cementina-Olpoc, 2013).

Analysis of Literature Review

The literature reinforced many of the themes found in my data analysis. For example, the norms of geographically dispersed employees working in higher education institutions should be derived from policies and procedures set forth by leadership rather than emerged through disorganized reactions and amoeba-like subcultures. The change management policy statement will increase awareness and knowledge of new norms,

values, processes, and proposed changes across the department and/or organization. Additionally, the policy statement will address acceptable behaviors for communication, collaboration, and team dynamics.

The literature has shown geographically dispersed employees that have greater support for planned change when the policy considers (a) positive team dynamics, (b) supports a shift in culture, and (c) fosters connectedness to the organization and its' mission and vision. Furthermore, positive team dynamics among remote employees reduces stress and anxiety while increasing collaboration among team members, thus shifting their culture. Additionally, strategic change management initiatives that are designed for geographically dispersed employees must take into account their culture of communication and collaboration. As the literature reflects, change management strategies are not a one size fit all. Important differentiations that should be reflected are:

- differences in time zones;
- regional differences in terms of geographical locations;
- varying dynamics of each remote team;
- differing leadership styles;
- tenure;
- buy-in to adapt to change;
- and, the need to feel included in the change process.

The policy paper included as my research project recognizes the differences in geographical differences amongst the remote team. While there may be similarities in

goals and objectives for geographically dispersed employees and those who work onsite, change management strategies should address both populations of employees. To ignore the requisites of remote employees may be the difference between positive adaptation and one that is onerous, challenging, and fraught with resistance to change. The following section is going present a policy statement for geographically dispersed employees undergoing planned change.

Policy Statements and White Papers

My review of literature confirmed my selection of a policy paper as an appropriate research project based on my findings. Young and Quinn (2002) suggested white papers are a powerful way to provide information and influence decision makers. As policy statements are rooted in connecting findings to potential solutions (Stelzner, 2010), white papers provide stakeholders with a summary of a concern or challenge, pointed analysis, and potential recommendations (Young & Quinn, 2002). Stakeholders may refer to the completed research for the full findings that support the proposed recommendations.

According to Stelzner (2010) white papers discuss a particular position and prescribe solution to a problem. The white paper presented in my project study represented the viewpoint of a specific population, geographically dispersed employees, and recommended a policy statement as a potential solution. A policy statement is an organizational document that outlines acceptable behaviors, policies, and processes

(University of Colorado, n.d.). Policy statements may appear within a white paper, or as a stand-alone document.

The purpose of the white paper in this project study was to introduce policy statement outlining change management strategies for geographically dispersed departments and employees. Although this white paper and policy statement were crafted as a result of findings of a study rooted in higher education, they have applications to any organization that has remote teams.

One challenge in authoring a white paper is the limitation in scope and focus. There were several key findings in my project study that have application to improving the experience of geographically dispersed employees, but for the purpose of the white paper, it was important to share data which supports the creation of a policy statement. Thus, several key findings were not included. This next section considers white papers and policy statements as a tool for effecting change in higher education.

Uses of a White Paper and Policy Statements in Higher Education

White papers have been historically referred to as governmental reports, providing informative and authoritative information (Sakamuro, Stolley, & Hyde, 2017). Authors use white papers to present a specific position or to address a problem (Sakamuro et al., 2017). Traditionally, white papers have been used to present a business case, marketing, and product descriptions (Lawrence, Thomas, Houghton, & Weldon, 2015). However, they are also a medium to present policy statements and guidelines (Young & Quinn, 2002).

A policy statement is used to indicate a statement on a particular topic or challenge. They are concise and limited in historical information. Policy statements seek to provide a statement and recommendation on a specific topic. In higher education, a policy statement provides a vision for future behaviors, norms, and expectations (Llywodraeth Cymru Welsh Government, 2013).

Academically, white papers and policy statements are referred to as a form of grey literature (Fatokun & Amusa, 2014). Grey literature, such as a white paper, lacks formal standards but is a widely used tool in higher education (Siegel, 2010). The absence of standardization may include lack of formal author, publisher, and peer review oversight which limits white papers from being considered a primary or secondary source of information in academia (Fatokun & Amusa, 2014; Sakamuro et al., 2017; Seigle, 2010).

Despite the lack of standardization, there are many benefits of white papers in higher education. White papers provide opportunities for greater dissemination of information to the desired audience than with academic or scholarly journals (Lawrence et al., 2015). White papers fill gaps in literature providing theoretical findings, alternative viewpoints, and ideas for future research (Sibbald, MacGregor, Surmacz, & Wathen, 2015). However, a lack of formal peer review of can be viewed negatively and not a true source of information.

White papers have proven useful in higher education to inform readers of policy or procedure changes. Presenting solution oriented white paper including knowledge on

how to resolve a specific challenge or present alternative viewpoints helps the readers/stakeholders to comprehend the matter at hand and decide if the proposed solution corresponds with their needs (Graham, 2014). These uses of white papers and policy statements align with the scope of my project study.

Project Description

I will be accountable to design a policy recommendation for the implementation of planned change to geographically dispersed employees employed at Acme University (AU, a pseudonym). The policy statement will include the follow actions: (a) planning, (b) evaluation, (c) review, (d) communication, (e) implementation, (f) documentation, and (g) evaluation and modification (Watson, 2005). The implementation of the policy statement for geographically dispersed employees would become effective following the approval of the VP of Business Development at AU. Incorporating a policy statement that addresses expected behaviors and norms encourages geographically dispersed employees to participate in the change process thus, reducing barriers to change.

Potential Resources and Existing Support

I have met with the VP and Executive Director of Business to discuss a protocol for sharing the policy statement with the geographically dispersed team. The remote field team has regional kick off meetings at the beginning of year. The agenda for the regional meeting consists of yearly goals and objectives, reflections from the prior year, and establishes acceptable behaviors for individual team members. If the policy statement is approved prior to the winter face-to-face meetings, there is an opportunity to add the

policy statement to the agenda. Additionally, several remote meetings will be scheduled to announce the policy statement and allow for questions and answers. The team will have several opportunities to review the policy statement.

Potential Barriers

The first potential barrier is my project study will not be finalized in time for the summer meetings. The VP has approved presenting the policy statement at the winter meetings. If the policy statement is not approved in time, I will be given the opportunity at our yearly meeting, which takes place in July, to review the policy statement in person. In the meantime, I will have held several check-ins to account for assurances.

A second potential barrier is the policy statement will not be fully embraced by the remote team and the policy will not be fully implemented. Despite full support from the VP and Executive Director, the remote team has many competing forces and if the policy statement is not made a priority by leadership, integration will prove unsuccessful. Another potential barrier would be the reluctance of individual remote employees to follow the policy statement. Individual team members must have buy-in from leadership to modify their current behaviors during planned change. Should this occur, I could survey the team to determine why the policy statement is not embraced.

Proposal for Implementation and Time Table

The implementation of this policy statement could occur in January 2018. Following approval by the VP and Executive Director of AU, communication to the team can commence. Communication of the policy statement will be presented on a monthly

all team call during a Skype meeting so the team can view the policy while it is being presented. An electronic copy of the policy statement will then be distributed to the team that will be reinforced on regional team calls. The policy statement will also act as an operating agreement of acceptable behaviors. Moreover, face to face kick off meetings are held in early January to review 2018 goals and objectives, bringing geographically dispersed employees together with the opportunity to discuss and provide feedback on the policy statement. Following the implementation of the policy statement, there will be quarterly check-in with the team for assurances.

Geographically dispersed employees come together again in July for team meeting. Team members will be given the opportunity in July to provide feedback, share ideas, pose questions or concerns, and reflect on the impact of the policy statement during this meeting. Additionally, the field team will be asked to participate in a voluntary evaluation interview on the effectiveness of the policy statement during the July meeting to consider the impact on change adaptation. (See Appendix A for the complete policy statement).

Roles and Responsibilities of the Student and Others

I will serve as the developer and evaluator of the policy statement. I will present the policy statement the VP and Executive Director for approval prior to sharing the policy statement with the team. A Skype meeting with the VP and Executive Director will be scheduled to review the proposed policy statement, accompanying PowerPoint presentation, and an electronic communication of the policy statement to share with the

team upon approval of this project by Walden University. After I am granted approval from Walden University, the VP, and Executive Director of AU, I will ask a group of team members to review the policy before distributing it to the entire team. The group of selected team members will serve as informal leaders to support the implementation of the policy statement.

The role of the field team is to adhere to the policy statement that increases awareness and understanding of planned changes across the field department and organization to ensure changes are implemented thoughtfully, as well as minimize negative impact and behaviors. Moreover, the field team is expected to participate in all aspects of implementing the policy statement and candidly share if the policy statement mitigated the effects of planned change during evaluation interviews.

Project Evaluation

Evaluation of the policy statement is an important part of managing planned change. Evaluating a policy's effectiveness determines if the policy statement meets its intended goal. Formative evaluation will be used so I can obtain ongoing participant feedback. Peterson (2016) stated formative evaluation is one method of providing evaluation and feedback to the researcher during the activity so improvements can be made to benefit current and future participants. This method of evaluation not only provides for an effective evaluation, but also continuous adjustments (Peterson, 2016).

Surveying the field team provides instant feedback of the policy's effectiveness and determining how well strategies are working. The evaluation will focus on whether the goals and objectives of the policy statement are being achieved.

Planned change is constant in higher education and using a formative evaluation will allow me to modify the policy statement while change is occurring. The field team and leadership will be invited to participate in voluntary interviews to express their views on the efficacy of the policy statement. Participants will be engaged in voluntary individual interviews, regional team meetings, one monthly department call, and a breakout session at the summer team meeting to share questions, comments, or concerns about the policy statement. Participants will also be afforded the opportunity to share strengths of the policy statement and desired improvements. Survey findings will allow me to evaluate the policy statement, and determine if further strategies for change adaptation are needed (Peterson, 2016).

Project Implication

Planned Change Implications

Respondents in my project study described their perceptions and experiences of being a geographically dispersed employee who has undergone planned change. Interview participants were those more likely to support change when organizations and their leadership are supportive and empathic to the humanistic reactions change provokes. This finding creates an opportunity for organizational collaboration as most employees are in favor of change, but desire an inclusive decision making process. Organizations,

with geographically dispersed employees and teams, can create an impactful policy statement with the findings of my research lessening barriers while increasing employee engagement and inclusion in the change process.

The findings reflect that a combination of organization factors, such as communication, affect, tenure, collaboration, , team dynamics, leadership dynamics, and buy-in create a reaction to change. Change is constantly occurring, but the lack of face-to-face interaction with colleagues and leadership poses a challenge when change is created as a one size fits all. This reality makes it difficult to incorporate the needs of geographically dispersed employees in the design and implementation of planned change. Thus, leadership should consider how to engage geographically dispersed employees in an inclusive change process.

Possible Social Change Implications

Policies and their interpretation determine either the success or the failure of planned change for the organization and its employees (Cândido & Santos 2015, Rogiest, Segers, & Witteloostuin, 2015). Researchers have documented the effects policy statements impart changes in organizations, departments, and individuals (Beattie, Thorton, Laden, & Brackett, 2013). The need to conduct research focusing on the impact of policy statements on geographically dispersed employees undergoing change in higher education is provable (Beattie et al., 2013). Implications for positive social change are by engaging geographically dispersed employees in the change process and creating policies that enables them to have influence, and having leaders embrace employee

recommendations for progresses, reduces potential barriers to change adaptation.

Inclusion of geographically dispersed employees in the change process is more likely to produce positive perception of change (Rogiest, Segers, & Witteloostuin, 2015; Beattie et al., 2013). Thus, employees are more likely to implement changes.

Higher education is rooted in interconnecting social change research and policies to administration, students, and faculty. The empowerment of positive social change and its opportunity in this profession, it is essential for socially responsible institutions to establish policies where geographically dispersed employees can have an impact. Policies fostering social change may reduce potential barriers to change, open top-down, bottom up opportunities for enhanced communication and collaboration, and increase productivity during planned change. Social change advocates for socially responsible leaders who challenge their team to become agents of change.

Importance of Project to Local Stakeholders and in a Larger Context

The findings of this project study considered the potential to produce a positive impact on a geographically dispersed department, leadership, and organizations undergoing planned change. The results recommended creation of a policy statement that guides the geographically dispersed employees, department and organization through shared mission and vision, team behaviors, and goals, proposed change will be better supported. Findings also suggested that positive leadership dynamics inspire change adaptations and may result in employees who are better prepared accept change. The failure of leadership to address organization factors also impacts the successful

implementation of planned changes and may have lasting implications for not only the department, but the organizationally.

Section 4: Reflections and Conclusions

Introduction

The goal of my research was to understand perceptions and experiences of remote nonfaculty employees who worked in higher education and were undergoing planned change. With the explosion of online education and technology in the past 10 years, workforces are no longer tied to a campus, and there are gaps in literature addressing strategies to understand how planned change affects geographically dispersed employees/departments. Research was limited to the experiences of remote faculty or those who were employed in a non-higher education setting. Because I am employed at a university where my entire department works remotely and has undergone significant planned change, I wanted to explore the challenges this population faced as it related to change adaptation in order to provide strategies to reduce potential barriers and have the possibility of effecting social change.

This research process has taught me a lot about myself as a writer, researcher, and doctoral candidate. Scholarly writing requires many drafts, great attention to detail, and much patience; it is a skill that students develop over time. I struggled to adapt my writing style to scholarly requirements. Second, many emotional barriers occurred during this process that I was not prepared for, and I was challenged internally to move forward. Over time, this process became less about making the accomplishment than about the awareness that not completing the degree would be one of my lifelong regrets. I am

extremely grateful for this experience, as it not only developed my scholastic abilities, but also challenged me personally.

Project Strengths and Limitations

Project Strengths

This project study was designed to explore perceptions and experiences of geographically dispersed nonfaculty workforce employees who were employed in a higher education setting in order to consider strategies for increasing the effectiveness of change management. Hechanova and Cementina-Olpoc (2013) stated that “because organizations are human systems, the success of any transformation effort lies in the people who are tasked to implement changes” (p. 11). Additionally, the variable of commitment to change, aligning oneself to the change, and showing support for the change “and/or being able to help and ensure successful implementation of the change” is influenced by a variety of organizational factors (Hechanova & Cementina-Olpoc, 2013, p. 13). My literature review and subsequent project study noted the need for higher education institutions to offer alternative change management strategies that are inclusive to remote nonfaculty employees.

The policy statement presents strategies for stakeholders designed to lessen barriers to planned change and provide expected behaviors and norms. The policy statement will be presented to stakeholders including the VP, executive director, and regional business development directors as a standard of expectations of behaviors and norms among remote employees during planned change. Along with me, these

stakeholders will guide the policy statement implementation for the remote team. Once the policy statement has been circulated, follow-up interviews will determine future modifications.

A policy statement was selected to address issues and present recommended change management strategies to alleviate current emotional, organizational, and departmental barriers to successful planned change. Malik (2014) asserted the need to view change as a process and noted a need to understand barriers that are “associated with its successes and failures” (p. 35). The policy statement was designed to clarify a strategic direction for geographically dispersed employees and identify expected change behaviors. The policy statement also served to provide strategies to bridge the gap between geographically dispersed employees, leadership, and the organization.

The analysis of interviews, reinforced by a broad literature review, was influential in determining strategies that support positive change management simultaneously with social change. Positive social change will derive from change management strategies that are inclusive of remote employees and increase connectedness to the organization and its mission and vision. The policy statement will engender commitment to creating an environment for positive planned change that is more inclusive of geographically dispersed employees and supported by leadership and the organization.

Project Limitations

The main limitation for this project study is change itself. Since this project study commenced, there has been a number of large organizational changes that have affected

personnel, strategy, and the ways in which departments function. Stakeholders are still very supportive of the policy statement; however, there may be a struggle in gaining employee buy-in to adhere to it if the leadership team does not enforce it as a whole. Additional limitations include employee engagement in abiding by the policy statement and expected behaviors; leadership dynamics; and communication norms.

The selected methodology can also be considered a limitation to this project study because it required me to be aware of and acknowledge biases. Consistent with conducting an ethnographic study, I was aware of my experiences within the division and attempted to conduct interviews and interpret data objectively, despite my personal relationships with many of the participants. However, participants often referred to situations during interviews of which I had prior knowledge. In response, I attempted to disassociate myself from the team personally during the periods of data collection, subsequent analyses, and interpretation of findings.

Including other geographically dispersed departments from the selected university or other universities might have been valuable for the study. The scope of this project study was limited to understanding the perspectives of a geographically dispersed team, reducing potential barriers while increasing productivity, and adaptation to change at only one university. Recognizing the experiences and perspectives of this particular subset of employees will enable leadership to modify change management strategies to address their needs. With this project study, I did not intend create a one-size-fits-all policy statement; rather, the project study addressed a particular subset of employees in relation

to best practices and implementing change management strategies. At the time of this study, the department was undergoing major planned change, including restructuring, which is still ongoing. The current restructuring efforts, however, have not affected the leadership's willingness to implement a change management policy statement.

Recommendations for Alternative Approaches

An alternative approach to the problem could have been to invite additional remote nonfaculty departments from the selected university and remote departments from other universities to participate in the research. Including supplementary departments and universities would have expanded the scope of research, leading to the consideration of additional strategies, themes, and perspectives that might have provided valuable insight and further contributed to the creation of the policy statement.

Scholarship, Project Development, and Leadership and Change

Scholarship

I have been employed in various online for-profit nonfaculty higher education positions for the past 12 years, and my decision-making skills and thought processes are rooted in making sound business decisions. I was oblivious of the process it would take for me to develop and appreciate becoming a scholar-practitioner. The process of earning a doctoral degree contributes to building authentic philosophies that can be debated on their relative merits for the good of the cause. This process has not been completed by the majority of my colleagues and leaders, and I will have to keep this in mind in my dealings and strive for humility and understanding when dealing with others who have

not been through the doctoral education process. Completing the process helped me realize and appreciate more fully what scholarship is and how it applies to me in my own journey.

My experience working in online for-profit higher education had made me very knowledgeable about the benefits of furthering one's education. However, I was not prepared for the online classroom and the learning style needed to be successful. Prior to this doctoral program, my personal higher education career was done traditionally, despite my employment. I needed to modify my pedagogy, learning style, and time management to thrive and develop the competencies I needed for this program. As I reflect on this process, it is apparent that I have grown as a scholar.

Developing relationships with colleagues and faculty who are doctorly prepared has enabled me to enhance my critical thinking, communication, and writing competence. These relationships challenge me to think outside my current scope of practice and knowledge. My respect has grown for the time, research, and dedication it takes to master the various competencies needed to hold a terminal degree. Through this process, I am progressing to become a better scholar-practitioner.

My journey through Walden University and this doctoral project study has taught me what scholarship is and what it means to be a scholar. I will apply the knowledge and practice acquired through the project study to implement a policy statement containing strategies and practical approaches to matters presented by nonfaculty remote employees

undergoing planned change. Additionally, I have gained a new level of confidence and self-awareness personally and professionally.

As I ruminate on this journey, I realize that my evolution into a scholar-practitioner who embraces scholarship began during the very first interview for the data collection process. Two things became very apparent for me in that moment. The first was that I needed to disassociate any personal feelings and experiences from my interviews. Second, it was very important that I captured the perspective and perception of each participant. The integrity of the project study superseded all personal and professional relationships.

This project study has provided me the resources and confidence I need to succeed in and outside of higher education. The practice and knowledge attained have allowed me to participate in the university academically in a greater capacity by providing me opportunities to become involved with college leadership on a variety of projects within and outside my department. My contribution to social change has a greater reach to the wider university and student community. I am grateful for the opportunity to develop and conduct this project study. I now consider alternate perspectives and search for additional possibilities as I continue to hone my critical thinking and problem solving skills.

Project Development and Evaluation

As I reflect on this journey, I realize that I had many ideas for topics for the project study. I vividly remember discussing the topic of the lack of developmental

education geared toward professional students who are changing careers when I attended residency in 2012. This topic was a result of the 2008 economic crisis that found many non-degreed senior career professionals embarking on career changes but lacking the formal educational foundation to pursue higher education. When I first began putting my doctoral study topic together, I wanted to focus on lack of developmental education available to adult students. However, the 2008 economic crisis and the explosion of adult students returning to school was followed by the July 2011 rules that specifically targeted for-profit education and started a pattern of planned change that is still ongoing today. Subsequently, this led me to determine quickly that my university, despite having a global reach, does not always take into account the unique barriers to implementing planned change with remote departments.

The proposal for this project study originally involved a quantitative survey for the remote department that included closed-ended questions. After speaking with my chair and reviewing published research on remote departments, organizational change, and higher education, I quickly discovered that quantitative research would not capture the perceptions and experiences of participants. Additionally, after an exhaustive literature search, I found a gap in research that addresses positive planned change adaptation among remote nonfaculty departments in higher education. Participant interviews substantiated the uniqueness of this population's perspective of members' role in planned change. Thus, the project study addresses strategies and practice for inclusive planned change activities.

I discovered that the university community is supportive of implementing planned change strategies and practices that are inclusive of remote departments and their specific needs. As the project developer, I found that it was important that goals and objectives were clearly understood by participants, leadership, and the university administration, whose support I had for conducting this project study.

Lastly, I realized the importance of conducting evaluations during times of planned change. I maintained a distance from the department personally and professionally, and I had limited communications with my colleagues during and after data collection. I had been colleagues with many of the participants for 10 years, and I did not want my personal biases to affect this study in any way. As the project researcher, I believed that it was important to not only assess the information derived from participant interviews, but also understand the current organizational climate and how it affects participants emotionally. It was important for me that participants viewed me as a trustworthy and credible researcher. This challenged me to constantly reflect and consider participant interview outcomes to ensure that I captured the spirit and dynamic of the team.

Participants were happy to share their experiences, insights, and perspectives on the challenges of being a remote employee undergoing planned change. During the course of data collection, a few participants inquired about sharing additional information following the conclusion of their interviews. Some participants expressed excitement that leadership would be reviewing my project study recommendations upon completion of

this study. As a member of the remote department at the university, I was challenged to create a policy statement that addresses the unique needs of this population of employees. Through personal commitment and dedication to this project study, I was able to meet this challenge. This would not have been possible if not for the continuous guidance and feedback from my chair and second committee member.

Leadership and Change

When I began this program, I had an entirely different role within the university. My department was newly created, and there was a lot of uncertainty around the future of our positions due to new regulations. Embarking on this journey was very timely, as it uniquely positioned me to grow within not only my department, but also the university. Additionally, this journey helped me to discover an area of research for which I developed a passion and equipped me with the tools and resources I needed to navigate the uncertainty of change. Finally, as a leader among my peers, I have developed leadership characteristics that are consistent with a transformational leader who recognizes the importance of implementing inclusive change management strategies while always being respectful of the transformational leadership qualities of intellectual stimulation, idealized influence, inspirational motivation, and individual consideration (Bass, 1985). My doctoral journey has provided immediate and longstanding achievements that have benefited me both personally and professionally. This program has opened doors for me that I did not know existed. Additionally, my colleagues and leadership have recognized the professional growth that has come from completing this

degree. The skills I acquired will enable me to not only implement the white paper and policy statement that were developed in this project study, but also provide future change management strategies that could impact social change within the university and its community.

Analysis of Self as a Scholar

Providing thoroughly researched solutions is large part of my role professionally. I have always considered the work that I do academic but not scholarly. My development was a transition that occurred over the many milestones of completing the doctorate in education. When my studies began, they were rooted in criminal justice and human services and involved exploring ways to increase access to higher education pathways and the impact they have on socioeconomic status. As I continued in my professional career, I found myself drawn to higher education, specifically adult education. It was important to stay abreast of industry trends, including knowledge of the various characteristics of adult learners. As I began to analyze and understand the impact that adult learners, as consumers, have on education, I used the skill set I developed to investigate issues and develop internal strategies that drove policies and helped share our business development team. Working on this project study enabled me to look at a serious problem that is affecting my team at my current university and effect change.

Before this project study, I had limited experience with completing a qualitative study. I was drawn to the ability to investigate a specific problem by understanding differing perceptions and then connecting those interpretations to potential solutions.

These characteristics of research included for me an inherent quality that respects the uniqueness of adult learners. The skills that I have gained completing my qualitative study have already transposed into my professional role, as I am now creating employer surveys that are being deployed to business partners. While I enjoy working with students to help them navigate different pathways, my studies at Walden University helped me to realize that I enjoy working with organizations. Forthcoming, I would like to continue my study and use of qualitative research methods to address ongoing problems with employees in organizational contexts.

The topic of geographically dispersed employees and change was of interest itself almost immediately. Having been a part of previous reorganization and change initiatives as geographically dispersed employee working in a university with a global reach, the topic was timely. Additionally, I realized there was a need to explore this topic further as there was a gap in professional literature specifically addressing remote nonfaculty employees employed in higher education. The more I researched this topic and spoke with leadership my university, I saw there was a need to provide universities change management policies and best practices. This area of inquiry is especially sensitive and I found myself wanting to learn more about ways to mitigate the effects of planned change and increase employee participation as a tool to overcome resistance.

The project required scholarship to present accurately the perceptions and interpretation of participants, while producing a white paper and policy statement that provides applicable solutions. Since I am part of the population this study addresses, I

need to ensure my skills and knowledge as a researcher were nonpartisan. The development of the policy statement and white paper increased my own research and communication abilities. The opportunity to expand my knowledge of change management as well as provide applicable solutions provided a deeper learning experience for me than I ever could have imagined.

Analysis of Myself as a Practitioner

Being a practitioner in higher education is a concept that did not present overnight. This journey has tested me to pull from my personal, professional, and academic experiences as well as challenged me as a professional in higher education. I have worked in higher education for almost 15 years, 10 of them at the same university, in various roles, and as a part of many organizational changes. As a practitioner, I must continually be forward thinking and open to new ideas and alternative solutions.

My project commenced during a period of significant transition in higher education. New regulations were taking effect that had far-reaching implications to my department. Regulations concerning program data and outcomes, gainful employment, university recruitment strategies, and compensation metrics forced universities to undergo significant planned change. My project study was timely, as I was able to understand the various leadership and individual employee perspectives as planned change was occurring. Data collection and subsequent analysis provided a future policy statement and framework for a white paper. The practical application for this study gave me a solid foundation as I continue to work in for-profit higher education.

The information obtained during research fostered my understanding of various challenges within my current department and the broader institution. As a practitioner, my thought process gravitates toward finding solutions that are meaningful and respect diverse applications. Considering a concern that affects me personally facilitated a deeper understanding of the university's culture, norms, and connected me to its mission and vision. As a practitioner, I prefer to employ strategies proactively that could help enact meaningful change among my colleagues.

Walden University and the committee process, taught me the importance of following ethical standards to ensure data validity and reliability. Additionally, my committee challenged me as a doctoral candidate to constantly reflect and view myself differently, as I am now a scholar practitioner. The change management strategies in my doctoral project study enabled me to develop a policy statement that can be applied to a geographically dispersed team in and outside of higher education.

Analysis of Self as a Project Developer

My initial assumptions of being able to complete this project study in a timely manner were continuously thwarted by personal and professional obligations. Additionally, I continually doubted my own ability as a successful project developer and allowed my frustrations to interfere with my emerging skills and capabilities. Being a project developer is where my growth truly happened. The profound frustration and self-doubt I experienced, followed by the feeling of immense regret if I choose to abandon my doctoral journey drove my determination for completion.

At various junctures of the project study, I found myself confused and seeking clarification of the different facets of completing my doctoral study. It was at this point when I sought out internal and external help. My own resistance to asking for clarification on the rubric and setting appropriate internal expectations had significantly delayed my project. I had to overcome my own ego and realize that I was sinking as project developer and a student. Looking at the project requirements as a whole proved very daunting, so I decided to focus by section. This refocusing of my attention enabled me to regain momentum and my self-doubt subsided.

Engaging an editor, coupled with the resources that are provided by Walden University, became paramount for my success. I failed to familiarize myself with all resources offered by Walden University early on and now realize that a lot of my frustration could have been avoided. Once I became fully acquainted with every resource, I took full advantage of them. At this point, my growth as a project developer commenced.

At some point, I will pursue scholarly work again and now believe I am prepared to do so. The resilience, patience, and confidence I have found through this journey have affected the way I will broach future academic work. I am now confident in my own capabilities to produce scholarly work and in my growth as a project developer. I personally believe this growth has been most valuable to my career in business development. Effective planned change management requires project development

competencies to foster successful planned change, much like the capstone research project required planning and work that changed me in substantive ways.

Reflection on the Importance of the Work

Amidst the planning and development of this project study, my commitment and dedication to continuing to grow as a scholar, writer, and researcher strengthened.

Collaborating with colleagues at my university, I hope to provide research and a policy statement that is effective in reducing barriers to planned change for geographically dispersed employees, while increasing productivity and connectedness through inclusive change activities. Analysis to assess the efficiency of the current state of planned change initiatives provided areas for improvement and presented an opportunity to implement social change in our department and within the university.

My hope is the results of this study will encourage leadership at my university to review and evaluate current planned change policies and practices. The policy recommendations, resulting from my project study, presented perspectives and experiences of one geographically dispersed team that can be extended on to other remote departments within the university and faculty. The resulting project provides university leadership a policy statement to assess current change practices and affords a broader opportunity that is inclusive to university employees, despite their geographical location. The project study also has broader implications for for-profit and traditional higher education institutions that employ geographically dispersed employees by offering a

policy that may support change adaptation while increasing employee performance, thus mitigating the impact of planned change.

Implications and Future Research

I believe this project study offers an important opportunity to bring about positive social for geographically dispersed employees. Geographically dispersed employees want to benefit from the same planned change practices and activities that are afforded to onsite employees. Dasborough, Lamb, and Suseno (2015) suggested individual employee's perceptions of change may influence how others perceive change. Employees who participate in change activities have shown to have a more positive perception and experience during change because they focus more on the desired outcomes rather than processes, mitigating potential barriers to change (Dasborough, Lamb & Suseno, 2015). Coming to an understanding that social change is part of organizational growth greatly affected my project development. Although this project study was limited to one population of employees who are employed in higher education, the social change implications are broader, as findings may have application to any virtual team with similar characteristics.

Opportunities for future research include assessing the emotional impact of change on geographically dispersed employees. While my project study touched on the human element, the focus was limited in scope. Another opportunity for future research is to explore the impact of each organizational factor affecting change experiences. My project study serves as an introduction to the topic of planned change for remote

employees in higher education and demonstrates that future research is needed to understand fully all the complexities associated with leading geographically dispersed employees. Continuing to explore the impact of planned change of geographically dispersed employees will enable stakeholders to present inclusive change activities increasing employee engagement and productivity. Additional research will also provide opportunities to explore ways to better connect geographically dispersed teams to the university's mission and vision.

Conclusion

My project study employed realist ethnographic research methods to understand the perceptions and experiences of geographically dispersed employees who are employed at a for-profit university. Specifically, research focused on understanding the various organizational factors, policies, and relationships that affect this population of employees. The resulting project included a white paper that summarized the research findings and included an embedded policy statement. The white paper also proposed changing the organizational paradigm to create a learning organization that embraces the various complexities of change to more fully engage stakeholders. Lastly, the project considers recommendations for future research to gain a deeper understanding of the organization and emotional factors that may influence change adoption.

Realist ethnography included focus group and individual interviews with 13 geographically dispersed employees who were members of a field team within the university. Participants included 10 geographically dispersed field representatives, 2

geographically dispersed managers, and the VP of business development. Participant focus groups and interviews, coupled with an exhaustive review of current literature, provided support for the policy statement and white paper recommendations. Data analysis also supported the resulting recommendations to improve experiences of geographically dispersed employees, suggesting that executive leadership and the university should offer inclusive change activities for all populations of employees that meet their needs, job function, and goals.

Higher education institutions are continually engaging change initiatives. Leadership, communication, and collaboration coupled with change policies recommendations of my project study may help to alleviate barriers and create positive change experiences. I will continue expanding my capabilities as a scholar-practitioner in order to support my team more effectively. Completion of my project study has afforded me the opportunity to affect positive social change within my department and the university.

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Appendix A: The Project

Policy Recommendation for Implementing Planned Change With University Nonfaculty, Remote Employees

Executive Summary

The explosion in the popularity of online learning has caused a paradigm shift in higher education and created opportunities for institutions to enroll students from all over the country and the world. In response, higher education institutions are relying more than ever on geographically dispersed departments, teams, and employees to recruit and attract new students, foster employee-employer relationships, and fulfill daily functions once limited to onsite environments. The purpose of this paper is to inform stakeholders and leadership of the findings and recommendations from a doctoral study that I conducted with support from university and department leadership about ways to increase departmental adaptability and productivity while addressing potential barriers to planned change. The methodology used to conduct this qualitative study was realist ethnography which included focus group and individual interviews with 13 geographically dispersed employees who were members of a field team within the university. Participants included 10 geographically dispersed field representatives, two geographically dispersed managers, and the vice president (VP) of business development. The themes that emerged through the research provided the basis for this policy recommendation and is based on

my overarching research goal to better understand the university's field team representatives in terms of their perceptions and experiences regarding change, the mission, and their work while implementing planned change. The policy recommendation addresses positive social change by suggesting strategies for engaging geographically dispersed employees in the change process that enable them to participate more fully in change processes.

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Introduction

Institutions of higher learning rely on remote employees to serve as the local face of the university to attract emerging populations of students. As institutions expand to include online and blended learning to grow and increase profitability, the leadership of such institutions will be required to implement planned change initiatives (Jafari & Kalanaki, 2012). To be successful implementing planned change initiatives, it is important to examine the complexities of planned change and its effects on remote employees in the higher education setting.

Institutions are investing in remote departments to increase productivity, decrease rising costs, brand awareness, and to broaden their potential student pool (Barth, 2013; Hoch & Kozlowski, 2014). Online higher education institutions, therefore, are relying more heavily on geographically dispersed departments, teams, and employees to recruit and attract new students, foster employer relationships, and fulfill daily functions once limited to onsite environments. Many of these functions have taken to the road due to investments and growth in technology, and those functions now mirror the mobility of the online students themselves. Despite a dispersed geography, employees are expected to maintain high standards of productivity, communication, collaboration, and participation in the organization, especially during times of planned change. Barth (2013) highlighted the phenomenon of higher education institutions in the exploration of ways to better facilitate planned change through all layers of the institution, including geographically dispersed employees and departments. Recommendations presented in this paper are

based on the perspectives of remote team members and offered to suggest research-derived strategies to make change initiatives more meaningful and inclusive (i.e., engaging).

This evidence-based policy recommendation emerged from a doctoral research study titled *Understanding Planned Change Among Remote Nonfaculty Employees in Higher Education* (Lubin, 2017). Several theoretical frameworks were used to ground the study. The frameworks included systems theory; Tuckman and Jensen's theory of group dynamics and organizational change; Lewin's change theories (field theory, group dynamics, action research, the three-step change model, and the Burke-Litwin organization change model). The frameworks were relevant to the study on change, and they provided conceptual foci for considering how change is initiated, managed, and implemented in dynamic, differentiated, organizational environments.

Online institutions of higher education require geographically dispersed employees to be adaptive and resilient to a shift in functions, process, and practice knowledge. Through this policy recommendation, therefore, I present change management strategies as evidence-based recommendations to include geographically dispersed department personnel more fully in change decisions. I advocate positive social change through policy recommendations that, when implemented, will more fully engage geographically dispersed employees in change processes.

Context of the Problem

For-profit institutions have successfully increased market share by being responsive to employer needs that align with the globalizations of today's labor market (Gilpin, Saunders, & Stoddard, 2015). Shifts in the workforce have produced a growing demand for education that results in employability, innovation, and wage growth, providing educational pathways for students who may otherwise be unable to return to school (Bennett, Lucchesi, & Vedder, 2010). Pucciarelli and Kaplan (2016) found that for-profit institutions are better prepared to develop competitive strategies that drive and respond to change. The competitive landscape of for-profit institutions is forcing universities to change their business ethos, putting increased emphasis on their own internal organizational structure to propel strategies designed to meet the new market.

The university that was the subject of the doctoral study was an online institution that had over 500,000 students and alumni from all 50 states and over 140 countries. In recent years, the university had undergone numerous transitions to remain competitive. Transitions had included department and process re-alignments, enactment of new policies and modifications of existing ones, and the re-structuring of business. The university's onsite employees routinely benefitted from meaningful relationships with their colleagues and team members which provided ongoing support during planned change. Leadership was present at all organization levels of the university, interacting daily with employees, and increasing interactions and visibility during periods of change.

The university had remote nonfaculty employees, including field representatives, whose geographic locations limited their ability to participate in onsite change activities.

The field team functioned independently in various geographies across the United States to brand the university, recruit potential students, and form organizational partnerships. The inherent autonomy of the team's daily functions limited their interaction with employees at the university's headquarters. In recent years, the team had undergone numerous departmental mergers, process changes, and workforce reductions that expanded remote employee daily responsibilities and functions. Additionally, geographically dispersed employees had been affected through technology innovations, expanded programs, and competition among educational partnerships.

Planned change at the university focused on making strategic business decisions to remain competitive in the current regulatory environment. As the university engaged in complex internal change activities within various locations, geographically dispersed employees were less likely to be included in internal change activities, leaving management and change practices to be revealed and implemented simultaneously. Moreover, change activities were not modified to include the unique needs of virtual teams.

I explored the effects of planned change on university field representatives as well as how they impeded or facilitated it. The leadership of universities or companies may use these findings to incorporate the needs of remote employees into the design of future planned change initiatives and help reduce the barriers to successful planned change.

Finally, information gleaned from the study guided the development of this policy recommendation to assist organizational leaders to encourage increased collaboration between onsite and remote departments, to improve departmental cross functions, and ultimately improve employee morale. In turn, it is hoped that improved change processes increase employee efficiency and productivity, instill a higher sense of belonging and ownership among remote employees, and increase loyalty and dedication to the institution's mission and vision.

Purpose and Design

The policy recommendation offered here resulted from a qualitative study that explored perspectives and experiences of remote nonfaculty employees during planned change. The purpose of the study was to better understand the change process as experienced by this unique group of employees to recommend strategies to reduce barriers to change and increase productivity during planned change. Reducing barriers to change and increasing productivity during planned change requires planned change initiatives that include strategies to engage employees in authentic ways.

The thematic analysis of perceptions of all stakeholders (department leadership and remote employees) were considered to both appreciate current change management strategies and develop my recommendations. Realist ethnography was selected to explore the subculture, patterns, and perceptions of participants in this unique and emerging environment (Creswell, 2012). Realist ethnography allowed me to discover interconnections and patterns of the subculture (Lodico, Spaulding, & Voegtler, 2010); to

distinguish their beliefs, practices, and processes during planned change, while living through the change processes as an embedded part of that culture.

Sampling consisted of 27 candidates of which 13 participated. Each participant was invited to a focus group and individual interview. Focus interviews were offered in accordance to job title separating the field team from leadership. The VP only participated in one individual interview.

Candidates for the study were all part of a university field team that included field representatives, managers, and the field team VP with work experience ranging from just a few months to more than 10 years. For participation in the study candidates had to be a field team member at the university for a minimum of nine months. Recorded demographic information was limited to tenure and gender.

Institutional Review Board approval was obtained prior to commencing the project study. Participants were asked to sign and informed consent as my main concern was the protection of their rights and maintaining confidentiality. I disclosed the purpose of the research, potential risks and benefits, and confidentiality expectations at the beginning of each interview.

Research Questions

Interview questions were developed to elicit discussion that could help me understand field representatives' experiences, opinions, values, and behaviors individually and as a collective group (Glesne, 2011). The qualitative approach enabled me use semi structured open-ended interview questions for both focus group and

individual interviews. The overarching question used to guide the study sought to create an authentic understanding of the university's field team representatives in terms of their perceptions and experiences regarding change, the mission, and their work during the implementation of planned change. The following sub questions were developed to guide the study:

1. What organizational factors influence the implementation of planned change at the level of the university's field representatives?
2. What team dynamics influence the implementation of planned change at the level of the university's field representatives?
3. What leadership dynamics influence the implementation of planned change at the level of the university's field representatives?
4. How do field representatives at the university experience planned change?
5. How does the planned change process affect the organizational climate from the perspective of the university's field representatives?

Data Collection

Data collection activities commenced over a one month period beginning August 1, 2015 with the final interview concluding September 3, 2015. Remote employees function autonomously at dispersed geographical locations, thus the interview protocol mimicked their interactions with each other, leadership, and other university employees. Participants were provided a secure conference call number and pin to dial into explicit purpose of data collection. All participants, with the exception of the VP, took part in one

focus group and one individual interview. Interviews were recorded, transcribed, and downloaded to an encrypted folder. Additionally, an electronic notepad was employed to capture in the moment observations, perceptions, interpretations, and reflections during data collection. Each interview lasted approximately an hour. My interview with the VP was conducted by phone for approximately 30 minutes.

Data Analysis

Data analysis was a continuous process that took place simultaneously with data collection (Brewer, 2005). Data were analyzed to observe shared experiences and perceptions to generate patterns and descriptive units. Data was coded by descriptive words and phrases to help identify patterns and themes. Once all data were fully coded, content analysis began. Content analysis centered on finding meanings regarding planned change and remote employees in the information given by participants. ATLAS.ti 7 software allowed each piece of datum to be labeled with specific, relevant codes that were developed using keywords from interviews, uncovering a relationship between codes and themes.

The relationship between each set of codes was explored for remote employees and planned change independently. The following 11 codes emerged from the data analysis:

- administrative tasks and deadlines,
- affect,
- buy-in,
- leadership,
- change management,
- process change,

- collaboration,
- communication,
- organizational culture,
- team dynamics and,
- tenure.

Table A1 illustrates the five research questions and the themes that emerged from both the focus groups and individual interviews. The purpose of the individual interviews was to discover, confirm, corroborate, and deepen understanding of the focus group themes. Therefore, the themes uncovered in the focus groups were generally the same as those unpacked from the interviews.

Table A1

Field Representative Focus Group and Individual Interview Findings

Research Questions	Interview Themes	Connecting Theories
1. What organizational factors influence the implementation of planned change at the level of field representative remote employs at the university?	<ul style="list-style-type: none"> • Administrative tasks and deadlines • Collaboration • Communication • Process change • Affect 	<ul style="list-style-type: none"> • Action Research • Burke-Litwin • Systems theory • Tuckman & Jensen
2. What team dynamics influence the implementation of planned change at the level of field representative remote employs at the university?	<ul style="list-style-type: none"> • Affect • Tenure 	<ul style="list-style-type: none"> • Lewin's Theory of Group Dynamics • Tuckman & Jensen
3. What leadership dynamics influence the implementation of planned change at the level of field representative remote employs at the university?	<ul style="list-style-type: none"> • Buy-in • Collaboration • Leadership • Organizational culture • Affect 	<ul style="list-style-type: none"> • Field theory • Self-efficacy • System theory
4. How do field representatives at the university experience planned change?	<ul style="list-style-type: none"> • Affect • Leadership 	<ul style="list-style-type: none"> • Lewin's change theories
5. How does the planned change process affect the organizational climate from the perspective of the university field representative remote employees?	<ul style="list-style-type: none"> • Leadership • Organizational culture • Team dynamics • Tenure • Affect 	<ul style="list-style-type: none"> • Burke-Litwin Model of change • Systems theory

Table A2 presents the themes that emerged from both the focus groups and individual interviews of all participants.

Table A2

Combined Participant Themes

Theme	Field representatives	Managers	VP
Admin tasks and deadlines	Emergent theme	Emergent theme	n/a
Buy-in	Emergent theme	Emergent theme	n/a
Change management	n/a	Emergent theme	Emergent theme
Collaboration	Emergent theme	Emergent theme	n/a
Communication	Emergent theme	Emergent theme	Emergent theme
Affect	Emergent theme	Emergent theme	n/a
Leadership	Emergent theme	Emergent theme	n/a
Organizational culture	Emergent theme	Emergent theme	Emergent theme
Process change	Emergent theme	Emergent theme	n/a
Team dynamics	Emergent theme	Emergent theme	n/a
Tenure	Emergent theme	n/a	n/a

Note. n/a indicates that the designated theme did not emerge in the interviews with the indicated participant group.

I developed four important implications because of my thematic analysis. The evidence-based implications for effectively managing planned change for remote employees are provided as follows:

1. A clear and concise communication strategy needs to be deployed that accounts for managers and remote employees being in various stages of change all at the same time.
2. Organizational culture is an indicator of successful change.
3. Change needs to be strategically modified and managed to include geographically dispersed employees with strong consideration for their individual job functions.
4. Top-down, bottom up, and across/lateral collaboration reduces barriers to change management.

In turn, the themes emerged through this research provided the basis for a policy statement addressing strategies to engage (a) remote employees, (b) nonfaculty employees, and (c) higher education employees through planned change at the site where the study was conducted.

Change Management Policy

A number of factors—such as technology, human capital, vision and mission, culture, leadership, and goals—should be aligned for planned change to be considered successful (Patria, 2012). Nevertheless, creating a learning organization that embraces change is of much importance (Jafari & Kalanaki, 2012). Horváth (2016) found that

organizations must have specific drivers (employee, technological, process) in place for change to be adapted and fully scaled.

Change requires a paradigm shift in processes and behaviors individuality and organizationally (Malik, 2014). As change becomes more rapid, leadership vision of the strategic direction for the department and/or organization should emerge with clear and concise objectives (Malik, 2014). Brown (2013) found that universities are resilient to change and defining problems own their terms and developing and implementing their own solutions. Change policies should account for shifting paradigms of change. Brown (2013) found stakeholders (leadership) that creates a policy for culture that values sharing of information and building of trust between individuals and leadership shapes an organizational of positive change.

Scope

Changes occur across the organization, department, team, and individual levels. The policy sets forth the objectives of change management for the remote business development team. The scope of what is covered in this recommendation is limited to policies, procedures, and functions that directly impact and engage the remote business development team and its members.

The goal of the change policy is to ensure changes are taking place in thoughtful and meaningful ways, increasing understanding of desired behaviors and outcomes (Barth, 2013). The policy serves to provide a guide of expected norms to ensure the

impact on productivity is minimal. Additionally, the policy will provide inclusive change management activities that are specifically tailored around remote employees.

The policy applies to all remote nonfaculty employees who are employed in business development. The policies that support change management are provided in this document. According to Larsen and Eskerod (2016) change management, on an organizational level, is defined by micro and macro change. Macro change management refers to the organizational strategies, policies, structures, processes or capabilities for change, while micro change management with, tasks and tactics, guidelines for managing the implementation process, and human factors, including engagement. (Larsen & Eskerod, 2016). Such policies must protect the integrity of the change process and minimize the negative impact on business while maximizing the positives.

Objectives

The objectives for the change management policy are as follows:

- Reduce the amount of time to integrate change fully into daily functions and goals, while reducing unexpected outcomes.
- Create a communication and collaboration strategy for change management.
- Maintain a running document that outlines changes, priorities, and due dates.
- Ensure there is limited negative impact on productivity across the team.
- Confirm that change is adopted, implemented, and escalated if compliance is not adhered to.
- Provide sufficient ramp-up time to integrate changes fully.

- Establish and maintain understanding of desired outcomes of change.
- Engage remote field team representatives and managers authentically during organizational change initiatives.

Types of Change

Recognizing that change is ongoing, this policy is comprised of three different types of change as follows:

1. *Standard change*: Change that occurs within the normal course of business. Outcomes are well understood and changes may be made at the discretion of the employee or leadership (Benn, Dunphy, & Griffiths, 2014).
2. *Significant change*: Change that occurs and modifies a business function, process or policy. The outcome is not well understood. The scope is limited to change in goals, objectives, functions, personnel, culture, procedure, or strategy (Benn et al., 2014).
3. *Emergency change*: Change that is urgent and needs to occur immediately. Goals and objectives of change may not be defined and change results are quickly realized (Benn et al., 2014).

Standard change. Standard change is change that occurs in everyday business functions. This refers to decisions geographically dispersed employees make daily to perform their stated business function. Standard change is not prescribed by leadership as it usually is implemented to modify a business function or need. Leadership approval is needed for standard change, and for a new policy or procedure. For the purposes of this

policy recommendation, standard change will be limited to changes and actions employees and their managers make to carry out business functions.

Significant change. Significant change refers to the act of modifying or implementing a shift in direction of a current business function, policy, goal, objective, or process (Senge, Kleiner, Roberts, Ross, Roth, & Smith, 1999). Significant change is pre-planned and prescribed by executive leadership with stated desired outcomes (Gover & Duxbury, 2015). Significant change occurs over a period on a macro or micro level, and may include specific benchmarks to ensure change is transpiring (Chrusciel & Field, 2006). For the purpose of this policy, significant change is also referred to as planned change.

Emergency change. Emergency change refers to change that was not pre-planned by leadership, but requires a specific action (Shirey, 2013). Change may not have intended goals or objectives, but the act of change is urgent. Although intended outcomes of change are not stated at the time of change, there is an identified risk to business that drives the change.

Implementation

This change management policy outlines the process in which planned change is announced and delivered to the remote business development team. Geographically dispersed employees must be considered in the development change activities. For this reason, this policy recommendation addresses the three types of change, and desired objectives and activities can be determined by leadership. Once the change management

policy has been implemented, integration of change management activities may commence. This policy recommendation, therefore, provides the necessary flexibility required to meet the needs of geographically dispersed teams.

The change policy calls for five steps including type of change, details of change, implementation of change, change activities, and barriers to change. Each of these steps consists of specific actions or activities which facilitates change for geographically dispersed employees. Depending on the type of change, the policy is interchangeable with differing types and size of changes including personnel, policy, procedure, system, function, and process. Identifying the type of change, the corresponding actions that will be modified depending on need, and then next steps allow for flexibility depending on the person or region. This evidence-based, basic change framework is presented succinctly in Table A3. The framework should be considered a starting point. Stakeholders are encouraged to modify and add to this framework with the goal of increasing the effectiveness of future change initiatives.

Table A3
Change Management Policy

Change	Details of change	Implementation	Change activities	Barriers to change
Standard	Identify needed change.	Resolution or change.	Action plan.	n/a
	Process, function, responsibilities.	Stakeholders for each change detail.	Review with managers.	
	Objectives.	Measure for desired outcomes.	Review with managers.	
Significant	Identify needed change and desired future state.	Resolution or change.	Communication and action plan.	Strategies for overcoming resistance.
	Process, function, responsibilities, objectives.	Stakeholders for each change detail.	Schedule change activities and review with leadership.	Implement communication plan.
	Change approach strategy.	Develop required structures, (e.g., training plans).	Implement employee training plan.	
	Objectives.	Measure for desired outcomes.	Review & modify accordingly.	Communicate
Emergent	Identify change.	Implement desired change.	Communication and action plan.	Identify and mitigate barriers.
	People, process, function, responsibilities.	Identify stakeholders for each change detail.		

Note. Three types of change with associated characteristics.

n/a = the designated activity is not indicated for the change category.

Change Management Roles

In this paper the term *stakeholders* generally refers to field team representatives, remote managers, and respective leaders. Each stakeholder has different levels of responsibility to ensure change is implemented as planned. Identifying the stakeholders in planned change ensures that important organizational variables are accounted for. Valuable information including stakeholder responsibility for each change activity and potential reactions and outcomes should be considered for all stakeholder participation levels. Additionally, this planning will identify where stakeholders need to be engaged in the change process, and additional communication can be planned as needed. The following definitions operationalize the three levels of stakeholders.

Executive Leadership. It is the responsibility of the VP and any other executive leaders who might be identified to ensure all team members have a clear understanding of the policy and expectations. Additionally, it is executive leadership's responsibility to make certain that objectives and goals are clearly communicated. Executive leadership is ultimately responsible for confirming that changes are occurring in a manner that has limited negative impact and maximum positive impact on the functions of the business development team. The primary involvement of executive leadership is to help identify and monitor change goals to ensure that change supports the university's vision and cross functions while operating within applicable laws and codes.

Management. It is the responsibility of management team members to facilitate change to geographically dispersed employees. The primary management roles in the

change process are to work with leadership, other managers, and field representatives to create change plans, communicate change plans and lead change activities, measure change effectiveness in terms of objectives, identify potential negative outcomes or barriers, and manage the change process within identified budget constraints.

Additionally, it is the function of management to provide support, encouragement, and reduce potential barriers to change.

Field Representatives. Field representatives are active participants in change because they are most impacted by it on both micro (implementation) and macro (structural) levels. During planned change, it is this stakeholder whose direct role, function, policy, procedure, or processes will be modified. Field representatives are responsible for implementing change, collecting related change data, and reporting to management the effects of change on their prescribed business functions. Including field representatives during the planning stages will increase buy-in and support for the coming change. Even if the inclusion is limited to purposeful communication, the importance of repeated preliminary communication and updates about upcoming planned change must not be underestimated for engendering buy-in and engagement for the change.

Reducing Barriers to Planned Change

Resistance is a natural and unavoidable part of any change process (Alasadi & Askary, 2014). Identifying barriers early will enable leadership to implement strategies that target resistance. Resistance to change can make or break the success of change. It is

important barriers are addressed at every stage of change. Below are three strategies that leadership can engage with to limit barriers to planned change.

The first strategy to limit potential barriers to change is engage employees earlier in the change process. According to Allen, Smith, and Da Silva (2013) an effective way to overcome barriers begins with communicating future planned change initiatives with the team prior to rolling them out. Early engagement in change will enable employees to become excited, passionate, and feel that they are included in the change management process. Additionally, leadership can engage informal leaders to help shift the culture, secure buy-in, and manage the social aspects of change. Effective change is more likely to occur when employees see their peers positively responding to change (Brown, 2013).

A second strategy to reduce potential barriers to change is to engage executive leadership and management to act as change advocates and model change. When executive leadership and managers model desired behaviors and responses related to change, employees tend to follow suit (Brown, 2013). Modeling desired behaviors and responses, therefore, encourages geographically dispersed employees to embrace change.

A third strategy to reduce potential barriers to change is to identify the root cause of resistance (Alasadi & Askary, 2014). Resistance can derive from numerous organizational factors, such as fear, perceived lack of support or clarity, impact on current role, and lack of training. Executive leaders and management personnel can take steps to uncover barriers by eliciting feedback, acknowledging and addressing exposed barriers, and modeling a supportive, encouraging esprit de corps.

Limitations

The main limitation for any planned change is employee engagement and support for new policies and procedures through expected behaviors, team dynamics, and communication norms. Unintended (systemic) consequences can occur when policies are implemented without careful planning (Beattie, Thornton, Laden, & Bracket, 2013; Doherty & King, n.d.). This policy recommendation is offered to help guide future change initiatives to avoid systemic consequences. The policy recommendation will only be effective to the degree that it is implemented by all stakeholders.

This policy recommendation is a project based on a doctoral level ethnographic study. The scope of the study was limited to understanding the perspectives of a geographically dispersed business team. Goals of the study included reducing potential barriers, increasing productivity, and better implementation of and adaptation to planned change. The implementation of this policy recommendation should be considered with these limitations in mind.

Conclusion

The purpose of this project was to delineate and summarize the needs of geographically dispersed employees who work in nonfaculty roles in higher education and are undergoing planned change. The goal of the policy is to create a research-derived strategic direction for leadership to engage the remote team in the planning and execution of significant change to lessen potential barriers and increase change adaptation. University leadership must fully embrace the policy for the policy to be effective.

Change barriers are a key factor that should be considered in any change policy. Leadership should benefit by placing more attention on reducing potential barriers to change when introducing change processes. In this paper, I focused research-derived criteria for overcoming barriers to change. The assumptions included herein involve employees in the change process earlier to reduce barriers and increase change effectiveness. During the implementation of the change, executive leadership and the managers will find more success when they model and accentuate positive aspects of change to increase commitment and buy-in of employees (Sofat, Kiran, & Kaushik, 2015). This policy recommendation encourages leadership to empower geographically dispersed employees with affirmations of their essential roles and vice versa (Skordoulis, 2014).

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Appendix B: Interview Plan

Focus group (team) interviews were scheduled immediately following the receipt of informed consent. Team members were asked to select one of several pre-determined times for their focus group interviews. Names were not shared to help protect the identity of participants during each call. Each focus group participant was informed that individual interviews would be scheduled for a future time immediately following focus group interviews.

Team Interviews

The focus group interviews commenced with the definition of planned change and examples to participants to give them context so they can get an understanding of what planned change is (Dilshad & Latif, 2013). Below are three examples of planned change:

1. A CEO has retired after 21 years. A new CEO is hired from outside the organization. The new CEO finds that AU, Inc. was not operating efficiently and losing valuable resources effecting profitability and productivity. The new CEO implements planned change by restructuring departments and implementing new technology designed to improve productivity and increase profitability.
2. A company has a customer service hotline. Customer service employees must document each call after the call is completed and a ticket is sent to relevant departments for resolution. A recent survey revealed low customer satisfaction. The company implemented a new technology enabling representatives to chat with technicians over instant messaging while the customer is still on the phone and it is hoped that the new initiative will increase customer satisfaction.
3. A company sales team completes transaction paperwork for every new account and orders within accounts. The paperwork is then faxed separately to 3 different departments that do specific things only for new accounts. There have been issues with communication between departments resulting in orders not being fulfilled and accounts payable. The company executives decided to restructure eliminating positions from all three departments. The remaining employees are integrated into a new department that handles all new customers.

Interview script. As you know, I am conducting doctoral level research into the challenge of implementing planned change for a division of nonfaculty, remote employees in higher education. Planned change may be defined as change that is

deliberate, controlled, proactive, and collaborative. Below is a list of questions that will be asked during focus group interviews to the field team.

I would like to begin by discussing any organizational factors you can think of that influence the implementation of change from your perspective as a remote employee. The primary purpose of this research is to understand perceptions and experiences of the university's field representatives during planned change. It may be that organizational and other factors play some role in our collective understanding. Organizational factors include such things as communication, collaboration, work schedules, administrative duties, technology, and pay and benefits. What specifically was their influence (good, bad, or otherwise), and how could they be improved in ways that would facilitate planned change processes?

Let's discuss your relationships with co-workers, regional managers, and executive leadership during planned change. Please describe your typical role, as you perceive it relative to change initiatives, when change is implemented. During times of planned change is there a change in any of your roles or your relationships with coworkers? If there is a change in your role, please describe that change. Explain how role modifications during planned change processes help or hinder the change implementation.

Please describe your team or workgroup role when planned change is implemented.

Please describe any internal and external supports available to you during planned change.

Please share any other factors not previously mentioned, that influence the implementation of change from our perspective.

Describe any stress or anxiety you have experienced during planned change?

If you experience stress or anxiety during planned change, please relate how it affected you.

Organizational climate is the extent to which employees feel in positive or negative ways about their organization.

In what ways has the planned change process been positive for you?

What about negative experiences?

If you experienced planned change as neutral, please explain how that was for you.

Regional Manager Interviews

The focus group interviews with the regional managers commenced with the definition of planned change and provide examples to participants to give them context so they can get an understanding of what planned change is (Dilshad & Latif, 2013). Below are the three examples of planned change:

1. The CEO of AU, Inc. has retired after 21 years. A new CEO is hired from outside the organization. The new CEO finds that AU, Inc. was not operating efficiently and squandering valuable resources effecting profitability and productivity. The new CEO implements planned change restructuring departments and implementing new technology that improves productivity leading and increases AU, Inc. profitability.
2. AU, Inc. has a customer service hotline. Customer service must document each call after the call is completed and a ticket is sent to that department for resolution. A recent survey revealed low customers satisfaction. AU, Inc. implemented a new technology enabling representatives to chat with technicians over instant messaging while the customer is on the phone increasing customer satisfaction.
3. AU, Inc. sales team completes paperwork for every new account and then each order. Paperwork is then faxed separately to 3 different departments who do specific things only for new accounts. There have been issues with communication between departments resulting in orders not being fulfilled and accounts payable. AU, Inc. decides to restructure by eliminating positions from all three departments. The remaining employees are integrated into a new department that handles all aspects of new customers.

Interview script. As you know, I am conducting doctoral level research into the challenge of implementing planned change for a division of nonfaculty, remote employees in higher education. Planned change may be defined as change that is deliberate, controlled, proactive, and collaborative. Below is a list of questions that will be asked during focus group interviews with the regional managers.

I would like to begin by discussing any organizational factors you can think of that influence the implementation of change from your perspective as a remote employee and regional manager. The primary purpose of this research is to understand perceptions and experiences of the university's field representatives during planned change. I suspect that organizational and other factors may play some role in our collective understanding. Organizational factors include such things as the communication, collaboration, work schedules, administrative duties, technology, pay, and benefits. What specifically is their influence and what could be changed to improve their influence?

Next, let's discuss team dynamics. Team dynamics is the psychological and behavioral relationships that take place between members of a group, usually in an organization who are assigned the same task or team. Please describe any changes in team dynamics during planned change. Have you noticed that certain organizational factors influence team dynamics more than others? If so, which ones and what were their influences on team dynamics?

Staying on the topic of team dynamics, can you describe any changes with executive leadership during planned change? What organization factors involving executive leadership have impacted planned change?

Please discuss the influence of stress and anxiety on team during planned change. Describe how you manage stress and anxiety both for the team and for yourself during planned change.

Describe how being a remote manager may influence your commitment to planned change.

Please describe a planned change process you experienced in positive ways. What made it positive for you?

Please describe a planned change process you experience in negative ways. What made it negative for you?

If you have ever experienced planned change in neutral ways, please share that story.

In what ways is the planned change process positive for you and in what ways is it negative? If you experienced planned change as neutral, please explain how that was for you.

Vice President Interview

The interview with the VP of the field team commenced with the definition of planned change and an example of planned change to give additional context for this study (Dilshad & Latif, 2013). Below are the three examples of planned change:

1. The CEO of AU, Inc. has retired after 21 years. A new CEO is hired from outside the organization. The new CEO finds that AU, Inc. was not operating efficiently and squandering valuable resources effecting profitability and productivity. The new CEO implements planned change restructuring departments and implementing new technology that improves productivity leading and increases AU, Inc. profitability.

2. AU, Inc. has a customer service hotline. Customer service must document each call after the call is completed and a ticket is sent to that department for resolution. A recent survey revealed low customers satisfaction. AU, Inc. implemented a new technology enabling representatives to chat with technicians over instant messaging while the customer is on the phone increasing customer satisfaction.
3. AU, Inc. sales team completes paperwork for every new account and then each order. Paperwork is then faxed separately to 3 different departments who do specific things only for new accounts. There have been issues with communication between departments resulting in orders not being fulfilled and accounts payable. AU, Inc. decides to restructure by eliminating positions from all three departments. The remaining employees are integrated into a new department that handles all aspects of new customers.

Interview script. As you know, I am conducting doctoral level research into the challenge of implementing planned change for a division of nonfaculty remote employees in higher education. Planned change may be defined as change that is deliberate, controlled, proactive, and collaborative. Below is a list of questions I will be asking during the interview.

I would like to begin by discussing any organizational factors you can think of that influence the implementation of change from your perspective as the VP of Field Recruitment. The primary purpose of this research is to understand the perceptions and experiences of the university's field representatives during planned change. I suspect that organizational and other factors may play some role in our collective understanding. Organizational factors include such things as the communication, collaboration, work schedules, administrative duties, technology, pay, and benefits. What specifically is their influence (good, bad, or otherwise), and how could they be improved?

From your perspective as VP of field recruitment, how do you feel about the way change is implemented within the division?

Describe how being the VP influences your commitment to planned change.

Please describe a planned change process you experienced in positive ways. What made it positive for you?

Please describe a planned change process you experience in negative ways. What made it negative for you?

If you have ever experienced planned change in neutral ways, please share that story.

Let's discuss how the organizational climate may be impacted during planned change. Please describe any steps you take to manage organizational climate during change.

Describe what internal support is available to the team during planned change. Do the internal supports help mitigate organizational stress and anxiety during the planned change process? How so?

Please describe how you manage stress for yourself during the planned change.

Individual Interview

The individual interviews of the field team commenced with the definition of planned change and provide examples to participants to give them context so they can get an understanding of what planned change is (Dilshad & Latif, 2013). The examples will be pre-determined and not related to the field team or the university.

Interview script. As you know, I am conducting doctoral level research into the challenge of implementing planned change for a division of nonfaculty, remote employees in higher education. Planned change may be defined as change that is deliberate, controlled, proactive, and collaborative. Below is a list of questions that will be asked during individual interviews.

During the focus group interviews, we discussed how planned change might be influenced by organizational factors. Organizational factors that came out during the focus groups included things like, _____, _____, and _____. Now that you have had some time to think a little more about organizational factors and planned change, please add anything else that you could to the discussion based on your experience.

Please share, how does being a remote employee influence your commitment to planned change?

During the focus group interviews, we discussed your relationship with your colleagues under the broad category of team dynamics. Team dynamics is the psychological and behavior relationships that take place between members of a group, usually in an organization who are assigned the same task or team. Now that you have had some time to think a little more about team dynamics and planned change, please add anything else that you can to the discussion based on your experience?

Please describe how your relationships with coworkers are impacted during planned change processes.

How is communication within your team affected during planned change? Describe any increase or decrease in communication with your team during planned change.

How do these communications or relationship changes impact mission?

What about morale?

In the focus group interviews, we discussed how planned change may or may not impact your relationship with your manager. Now that you have had some time to reflect on this, is there anything else you would like to add?

How do you feel personally supported by your manager during planned change?

Describe how communication with your manager is affected during periods of planned change?

In the focus group interviews, we discussed stress and anxiety. Describe how you personally experience stress and anxiety during planned change, if you do.