Instructional Designers as Project Managers

A Phenomenology

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Although the need for project management education and experience is reiterated in the literature and in cross-industry instructional designer job postings, it was unclear how instructional designers acquired and used project management skills/tools in their profession because project management is not a focus in many higher education programs intended to prepare instructional designers.

The phenomenological study aimed to investigate the lived experiences of practicing instructional designers as project managers.

Results described best practices, models, methods, tools, and technologies that instructional designers use in acquiring project management knowledge and ultimately in managing their learning design projects.
The ability to effectively manage projects to completion and consult with stakeholders such as sponsors, subject matter experts, and learners in order to keep learning design projects moving forward to completion is a vital part of an instructional designer’s role (York & Ertmer, 2011).

Williams van Rooij (2013) reported that the ability to plan and manage educational/training projects is listed among the International Board of Standards for Training, Performance, and Instruction’s (IBSTI) advanced competencies for experienced instructional designers.

With project management being reiterated as a critical success factor in the literature and in practice and not being a significant part of instructional design-related education, it made sense to investigate how instructional designers were acquiring and using project management skills and tools.
It was suspected that many instructional designers might have felt ill-prepared to successfully manage learning or training projects – especially those new to their professional instructional design roles (e.g., recent graduates/hires or individuals who have recently been promoted or transitioned to the instructional design role).

The proposed study investigated how professional instructional designers in academia and industry learned to manage projects, how they were managing projects (e.g., what processes, methods, and tools they used), how they felt about their preparation for project management and their perspectives on project management, how these factors relate, and what pertinent recommendations they had for their peers.
What?

* Research is limited on the experiences of professional instructional designers regarding how they acquire project management skills, manage learning design projects, and their perspectives on doing so.

* With higher education instructional design-related curricula generally not including courses in project management, it is unknown how or if they are acquiring these skills on a consistent basis (Williams van Rooij, 2011).

How, Where, and When?

* There is a disconnect between what instructional designers are expected to know about managing projects in the field and how they are being prepared to do so in higher education.

* Instructional designers are plausibly not being positioned to be as successful in the project management aspect of their role as they could be, which could lead to failed projects – regardless of how successful their designs are.
Why?

- Project management is often not sufficiently covered in higher education programs focused on preparing instructional designers.

- Examples:
  - Williams van Rooij (2011) reported that there are 765 educational technology graduate programs in the U.S. focused on preparing students for careers in instructional design. Yet, higher education instructional design curricula generally do not include formal courses in project management.
  - In order to address the reiterated gap, Pan (2012) offered an integrated view of how marrying project management, instructional systems design (ISD), and ISD education would better prepare instructional designers for practice.
  - This gap between preparation and practice is reiterated in the literature (Klein & Jun, 2014; MacLean & Scott, 2011; Tracey and Boling, 2014; Williams van Rooij, 2013; York and Ertmer, 2011).
To describe the lived experiences of practicing instructional designers as project managers, confirm factors that influence how instructional designers manage projects, and identify factors that influence how they feel about managing their projects and their preparation to do so.

By gaining a better understanding of how instructional designers were managing their projects, recommendations for preparing instructional designers to work in industry were offered.

Achievement of the goal was measured by the offering of recommendations for the preparation and practice of instructional design project management, based on the experiences reiterated by the study participants.
There were two overarching research questions:

- How are instructional designers managing their projects?
- How do instructional designers feel about their experiences managing projects? (Which includes how they feel about their preparation, experiences, and the methods, models, and tools they use.)

Sub-questions included:

- What are the responsibilities of instructional designers as managers of projects?
- How are instructional designers being prepared to manage their projects?
- What common challenges do instructional designers face when managing learning design projects?
- What models, methods, tools, and technologies do instructional designers use to manage their projects? How do instructional designers feel about using these resources and their associated outcomes?
- What recommendations, best practices, or examples can instructional designers offer to help their peers successfully manage learning design projects?
The literature review focused on three key areas: instructional design competencies, project management and instructional design, and project management methodologies.

The literature review:

* Substantiated the importance of project management in the field of instructional design.
* Defined the competencies required to serve as an instructional designer (from both project management and design perspectives).
* Described the methods and models that are being used to manage projects (both in instructional design and in other industries).
* Reiterated a gap in the literature regarding how instructional design and project management converge.
* Underscored the fact that no other known study has captured the voices of instructional designers and translated their shared experiences in managing projects into actionable recommendations.
Research Approach

- The study utilized a **transcendental phenomenological approach**. Transcendental phenomenology is a study of the appearance of things, or phenomena, as they appear to us in our consciousness (Moustakas, 1994).
- The phenomenon of focus was the instructional designers’ lived experiences in managing their learning design projects. The general approach consisted of:
  - **Epoché** – consciously considering any possible presuppositions and planning how to avoid letting them impact perceptions; self-reflection during the research process
  - Ethical identification and obtaining of consent from participants
  - **Data collection**, conducting a series of interviews – exploration of the phenomenon with a diverse sample of instructional designers and describing what is gathered
  - **Data analysis and synthesis** – the identification of significant statements, clusters of meaning, and synthesis
  - **Description of the phenomenon** – A written description of the essence of the instructional designers’ lived experiences in managing their learning design projects and the resulting recommendations
Research Design

Describe the lived experiences of instructional designers in managing projects and identify factors that influence how they manage projects and how they feel about managing projects. The following illustrates the research design:
Who were the participants?

* Individuals having formal education in instructional design (or a related field of study) at the undergraduate and or graduate level, at least one year of instructional design practice, and experience managing their projects.

* Participants included instructional designers across different types of industries, institutions, and organizations.

How many participants?

* Eight participants

How were participants be recruited?

* Instructional designers from various organizations such as the ATD, PMI, colleges/universities, corporations, and those who participate in social media forums like LinkedIn and conferences such as the Online Learning Consortium were invited to participate via email or through their social media inboxes.
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Illustration of How PM Recommendations Resulted from the Four Overarching Themes: ID/PM Background, PM Role Characteristics, PM Challenges, and PM Insights
Findings

ID/PM Background
* Possessed a higher education, held previous roles in education, training, or business in which PM skills transferred over, engaged in self-study, took advantage of mentorships, and participated in on-the-job training and practice.

PM Role Characteristics
* Creating project plans, hosting regular meetings, checking in with SMEs in between meetings, keeping the project on schedule, and making adjustments (e.g., to the timeline or resources) as needed.

PM Challenges
* Receiving information, materials, and or feedback later than planned, managing time, and managing people and expectations.

PM Insights
* Communication is key – Collaborating/building relationships helps projects progress; educate others on the ID process; use models and tools; document everything.

PM Recommendations
* Get a higher education in an ID-related field; perform self-study, seek mentorships, get PM training such as a PMP certification; gain experience.
* Colleges and universities should include PM outcomes in their coursework; Industry should provide training specific to their team’s PM processes.
References


Williams van Rooij, S. (2011). Instructional design and project management: Complementary or divergent? Educational Technology Research and Development, 59(1), 139-158.
