ATTENDING TO ISSUES OF SOCIAL JUSTICE THROUGH LEARNING DESIGN RESEARCH AND PRACTICE

by

KATHERINE L. WALTERS

(Under the Direction of TJ Kopcha)

ABSTRACT

This manuscript style dissertation consists of four articles that explore the phenomenon of attending to social justice issues through learning design and research. The first three articles are the results of research conducted in a Research Practice Partnership (RPP) with a rural public school system. The purpose of the project was to support teachers in engaging students in the history of their community through place- and project-based, humanities lessons. The first article provided an initial understanding of the practices and perspectives of teachers around teaching sensitive issues of the history of the community, including slavery and civil rights. The second article focused on the theory and practice behind the design of the place-based approach to humanities education. We identified three learning strategies taken-up by teachers to support this approach including: the personalization of history, historical perspective taking, and modeling a critical position. The third article presents a conceptual contribution, rooted in my experience in the RPP, on what accountability is and what it may look like in learning design from a critical perspective. In particular, we focused on the practices of self-reflection, critical perspective-taking, and dialogic communication, and the ways these supported my own accountability during my work on the RPP. The fourth article took a broader look at the phenomenon of centering social justice in the field of LDT, using multiple case study to look across scholars as they negotiated issues of social justice in their professional practice. We found the process of *centering social justice* is dynamic and relational. Attending to social justice in learning design and research requires a reflexive, reflective approach situated within understandings related to designer positionality and power dynamics.

INDEX WORDS: instructional design, social justice, multiple case study, research practice partnerships, humanities education, project-based learning, positionality, reflexivity, power dynamics, self-reflection

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DEDICATION

This work is dedicated to AECT's Culture, Learning, and Technology Division members, past and present, for their leadership in centering issues of inclusion and equity in LDT scholarship and practice.

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CHAPTER 1

Introduction and Literature Review

This manuscript style dissertation consists of three peer-reviewed, published articles and one article ready to submit for publication. Together, these articles represent my inquiry around the phenomenon of attending to social justice issues through learning design and research. As a former community organizer, I entered the field of Learning, Design, and Technology (LDT) interested in where and how issues of equity and inclusion intersected with the professional practice of learning designers. To further this interest, I began working as a research assistant in a Research Practice Partnership (RPP) with a nearby rural K-12 school system. One of the first projects in the RPP involved high school history teachers working with their students to update and maintain a database of individuals who had been enslaved in their county. This project was particularly meaningful as many of the descendants of these enslaved individuals lived in the county in the present day. The students were not simply pulling out names and information about random, long-passed people, but about their community's family members.

Initially the teachers involved in this project were two white males, both with graduate degrees in history. However, as the project began to grow a more diverse group of teachers got involved and added their perspectives and lived experiences to the project. I watched as these teachers became leaders and modeled community-engaged, culturally-responsive, and learner-centered practices. At the same time, I was aware of emerging

tensions around race and identity, around who should and could speak for marginalized communities, and around how to meaningfully address issues such as racial and economic oppression in K-12 classrooms without centering a singular, oppression-centered narrative regarding marginalized communities. Working within these tensions lead to me reflecting deeply on my own social justice goals, including who I needed to be accountable to during this project, and how I might accomplish that accountability. Although my background in community organizing provided me with an understanding of how oppression operates at multiple levels (e.g., individual, institutional, socio-cultural), engaging in educational design research around such issues was an entirely new experience.

My own positioning within this RPP, my previous experiences, and my developing identity as an LDT scholar situates this manuscript-style dissertation. Below I first provide more context on the RPP and then describe each of the four studies that comprise my inquiry into attending to social justice issues through learning design and research.

Context of Multiple-Article Dissertation Research

A Research Practice Partnership (RPP) between the Putnam County Charter School System and the University of Georgia served as the initial site for my dissertation research. This RPP evolved over many years (2014-present) encompassing multiple grant-funded projects (from the National Endowment for the Humanities and the Spencer Foundation). The overall purpose of the RPP was to engage K-12 students in lessons and activities that supported inquiry into the history of Putnam County. One of the resources introduced through our project was a set of photos and a report on Putnam County

created in 1941. The report focused on how social institutions adapted after the end of plantation farming and the practice of slavery. Putnam's Harmony community was chosen for its "bi-racial" element, having 50 black and 20 white families. These families made up "two communities having little in common except the understanding that keeps them apart and their economic interdependence" (Wynne, 1943). The report and photographs offered students a unique look at the past, and, importantly, a framing and production of race and race relations situated within a specific historical moment.

My role in the RPP was to assist UGA COE faculty member TJ Kopcha during K-12 teacher professional development workshops and sessions. I also spent a year observing the community-based lesson implementation at the middle and high school, and in supporting teachers on the ground during these lessons. The first three articles of my multiple article dissertation are the result of my research and design practice in this context. My fourth article takes a broader look at the phenomenon of centering social justice in the field of LDT. I used multiple case study to look across scholars as they negotiated issues of social justice in their professional practice to identify the relationships between issues of social justice, design practices and perspectives, and the project context. These articles are detailed below in Table 1.1; the first three articles have been peer-reviewed and published, while the fourth article is ready to be submitted for publication.

Table 1.1

Overview of Articles for Multiple Article Dissertation

Article Title[1]	**Method**	**Purpose**	**Findings**	**Contribution to Body of Work**
"History Comes Alive"	Case study	Document the benefits and challenges of a place-based local history program as perceived by the teachers	Design implications for future place-based history PD included: support for building community connections and discussing sensitive topics, engagement in multimodal expression, scaffolds around developing multiple perspectives	Provided an initial understanding of the **practices and perspectives** of teachers around teaching sensitive issues of the history of the community, including slavery and civil rights.
Humanities Education in the US Rural South	Design-Based Implement-ation Research (DBIR)	Builds on Article 1 by looking across content areas to understand the ways in which teachers integrated a place-based approach to humanities education when meeting state standards.	Identified 3 learning strategies taken-up by teachers to support humanities, project-based approach: the personalization of history, historical perspective taking, and modeling a critical position.	Describes the **theory and practice** behind the design of the place-based approach to humanities education. Also explores the way PD on the approach impacted teachers and students in the classroom -- both on lesson plans and student learning outcomes.
Account-ability in LDT	Conceptual /Theory	Offers an introduction to the constructs at play when designers place accountability at the forefront of their work. These constructs were drawn from my practical experiences in the RPP with Putnam County.	Constructs related to accountability in learning design include: socio-cultural-historical context, positionality, intersectionality, and critical consciousness. Practice of accountability requires self-reflection, critical perspective-taking, and dialogic communication.	A **conceptual contribution**, rooted in my experience in the RPP, on what accountability is and what it may look like in instructional/ learning design from a critical perspective. Addresses the noted "social justice blindspot" (Bradshaw, 2018) in the field.

Negotiating Social Justice Issues in LDT*	Multiple case study	Explores the ways LDT scholars negotiate issues of social justice in their practice and research. Methods looked across contexts to understand participants' design practices, as well as the connections between those practices, their perspectives, and the local context.	The process of *centering social justice* is dynamic and relational; it is influenced by the designer's perspective and understanding of emerging tensions. Design practices were employed to address justice-based tensions. Attending to social justice requires a reflexive, reflective approach situated within understandings related to designer positionality and power dynamics.	Provides insight into the **practices and perspectives** of designers who negotiate issues of social justice as part of their design and research. Grounds the concepts and ideas commonly found in the literature around issues of social justice in actual design practice.

1: References for articles include:

Walters, K., Kopcha, T. J., & Lawton, C. (2020). "History comes alive": Implications for teacher professional development on place-based local history. In M. Ochoa & D. Gibson (Eds.) *Research Highlights in Technology and Teacher Education (pp. 121-130).*

Walters, K., Kopcha, T. J., & Lawton, C. R. (2021). Humanities education in the US rural south: Design, development and practice. *Journal of Applied Instructional Design, 10*(4), https://edtechbooks.org/jaid_10_4/humanities_education

Walters, K., & Kopcha, T.J. (in press). Accountability in learning design and research as an ongoing practice. In Hokanson, B, Exter, M., Schmidt, M., & Tawfik, A. (Eds.). *Toward Inclusive Learning Design: Social Justice, Equity, and Community.*

Overview of Articles

The first article, *"History Comes Alive,"* focused on two high school teachers who were the first to engage with the primary resources and place-based pedagogy the RPP would later center. I interviewed these teachers to gain an understanding of their experiences in lesson design, development, and implementation. In particular, I was interested in the ways these educators handled the challenges that often come with a project-based approach while engaging with difficult topics such as enslavement, the

struggle for civil rights, and issues of perspective and historical narrative. Their practices and perspectives around these issues led to specific recommendations for future PD sessions including, support for building community connections and discussing sensitive topics, engagement in multimodal expression, and scaffolds around developing multiple perspectives.

The second article, *Humanities Education in the US Rural South,* situated our pedagogical approach as project-based learning with a humanities focus. It provided insight into the theory and practice of this approach across content areas. At this point, the RPP included about 20 teachers from the elementary, middle, and high school, in the content areas of mathematics, history, English Language Arts (ELA), critical thinking, life science, and art. The article described the way theory and iterative data directed our approach to PD workshops, lesson design, development, and implementation, as well as the student learning outcomes over two years in the middle school. The learning strategies identified in this article represent the ways teachers took up the project-based, humanities approach focused on in PD sessions and situated the approach within their own perspectives on the community and the needs of their students.

Up to this point, the articles focus on design theory and practice, and data on the teacher and student experience. In the third article, *Accountability in LDT*, I took a step back and reflected on my experiences as a member of the RPP. In particular, I was interested in providing a conceptual perspective on the ways social justice issues were emerging in the RPP and the way I and others on the design team were attending, or not, to these issues. This article addressed a perspective I found missing in the literature: the impact of the positioning of self and others based on socio-cultural-historically situated

identities, within a particular context, on our design practice. To address this, I focused on the construct of accountability, and what it means for designers, particularly those working on community-based projects. Using an example of a tension related to social justice issues that had emerged in the RPP, I described a critical, situated perspective on accountability. I focused on four constructs: positionality, intersectionality, critical consciousness, and socio-cultural-historical context, as well as three practices: self-reflection, critical perspective taking, and dialogic communication. I used the example to explain the ways these constructs and practices may interact during a design project.

Building on this conceptual piece, my final study looked across multiple scholars who negotiated issues of social justice in their professional practice. I aimed to understand the ways experiences and values, the socio-cultural context of the project, and general approaches to design (e.g., philosophies, theories, and instructional models/principles), impacted design practices when negotiating issues of social justice. By looking across scholars who worked in a variety of contexts, I explored how interactions between these components and both the goal and process of centering social justice created tensions. Design practices were then implemented to assuage these tensions. This study provides insight into the ways current scholars are taking up issues of social justice by engaging in a critical, responsive approach to design.

Social Justice Issues in LDT: A Literature Review

Attending to issues of social justice in LDT requires an understanding of the ways social, cultural, and historical contexts impact learning and design. Below, I first address what a socio-cultural and historically-situated perspective means for the practice of

learning design and the role of designers. Then, I review three perspectives on learning design that relate to issues of social justice: ethical, cultural, and critical.

The Socio-Culturally Situated Design/er

Scholars in LDT who address social justice issues engage with many philosophies and theoretical positions, however, in general the underlying assumption of this body of literature is that learning design is relational, collaborative, and socio-culturally and historically-situated. The idea that learning design is relational and collaborative stems from the fact that, whether in K12, higher education, or industry, it involves communicating with others to better understand their goals and needs, as well as making efforts to understand the larger systems within which people interact, work, and learn (e.g., school districts, organizations/corporations, and broader cultural communities). Learning designers incorporate this contextual knowledge alongside their disciplinary knowledge, e.g., instructional theories and models and learning theories, to create meaningful and accessible learning activities and environments (Stefaniak, Luo, & Xu, 2021)

A socio-cultural perspective of learning posits that everything is embedded within the norms and values of the socio-cultural context in which it was created (Vygotsky, 1978). Social and cultural norms and practices frame the ways that humans make sense of the world, as well as how we communicate what we know with others (Kress, 2010). Stating that learning design is socio-culturally situated means acknowledging the myriad influences on the process and product of learning design. This includes the goals, values, and previous experiences of the people involved, as well as their cultural, institutional, and/or community norms and practices. In some cases, the influence of those factors is

explicit -- a designer may intentionally center issues of race, culture, and equity as part of a learning design. In contrast, a designer might attempt to take a neutral stance as a way to avoid being culturally or situationally offensive. However, even with an attempt at a neutral stance the influence of context is apparent -- it can inadvertently imply that issues of equity are not problematic when they, in fact, are, or lead to designs that alienate learners and perpetuate a harmful narrative about the learner (Subramony 2004; 2017). For that reason, each design project is socio-culturally situated, involving a particular combination of stakeholders, contextual factors, cultural considerations, constraints, and goals/needs that require an approach that attends to those particularities as they emerge.

Learning designers aim to develop meaningful experiences to meet the learning needs and goals of their target audience. However, because of the way socio-cultural factors impact our lived experiences, meaning-making, communication, and learning, there is no single 'right' way to engage in learning design. Attending to socio-cultural factors in learning design requires a set of practices, implemented in context. Those practices span the gap between the designer's disciplinary perspectives, i.e., the selected design models and learning theories, and the context the design will be implemented within. Even when using a model designed with socio-cultural considerations in mind, a designer must figure out and establish practices that attend to the tensions that emerge -- tensions that are often rooted in issues of equity and diversity.

Design practices encompass what a designer actually does throughout the entirety of a design project, from start to finish, such as the selection/discontinuation of design models, needs and learner assessments, usability testing, and summative and formative evaluation (Reiser, 2001). They also include working on design teams, collaborating with

subject matter experts, and other interpersonal practices (van Leusen, Ottenbreit-Lefwich, & Brush, 2016). The way designers engage in these practices "reflect [their] values and belief structures, understandings, prior experiences, and construction of new knowledge through social interaction and negotiation" (Campbell, Schwier, & Kenny, 2004, p. 246). In other words, designers bring their values and understandings into their design practices; it is through interaction with others -- e.g., students, SMEs, other design team members -- that they construct new understandings that then also impact their practices. Both socio-cultural factors and the relational nature of design ensure design practices are situated within designers' ways of knowing, whether they explicitly attend to these or not.

If designers make decisions based within their socio-cultural values and understanding, then it is critical for designers to identify these values and beliefs and the ways they impact their research and practice. As well, a socio-cultural perspective on design requires designers to understand their learners' and other stakeholders' cultural norms and practices and the impact on learning needs and outcomes. Therefore, a designer is responsible for far more than implementing particular design models or principles. The role of the designer is complex, situated, and relational -- and includes space for designers to consider issues of equity, inclusion, and diversity. Designers can choose to align their values and understanding with emancipatory perspectives on learning and design and create and implement design practices to support these perspectives in their research and practice. Currently, designers looking for guidance on how to do this work may pull from research that looks at learning design from ethical, cultural, and critical perspectives.

Perspectives Guiding Learning Design Practice: Ethical, Cultural, Critical

Overall, the field of LDT has approached the issue of social justice through three distinct perspectives: ethical, cultural and critical. Below I review the literature on each of those perspectives and their relationship with learning design practice and research.

Ethical Considerations

Ethics are the "systematic expression of rules or normative commitments" (Gray & Boling, 2016, p. 973) based on a professional or social role. The professional organization for learning designers and scholars, AECT, created a code of ethics centering on three commitments: to the individual, to society, and to the profession. In general, AECT's code of ethics sets a baseline for expected behaviors and attitudes when engaging in learning design and other associated activities. Underlying these commitments is the assumption that experts in the field of LDT have a responsibility to others -- a responsibility to individuals to support their privacy, learning goals, and diverse perspectives, and to society to contribute expertise towards solving social issues. This responsibility is evident in the principles associated with each commitment. For example, under commitment to the individual, the second principle states, "Shall protect the individual rights of access to materials of varying points of view" (AECT, 2018). This principle emphasizes the relationship between the expertise the field has to offer and individual and social needs associated with that relationship.

An ethical perspective acknowledges how learning design is a social act that involves making judgements about what learners need and how to best design experiences that meet this need. Moore and Elsworth (2014) explained that "the very act of [learning] design itself is a manifestation of ethics" (p. 124). In other words, as

designers work, they make judgments that enact their own values and commitments, i.e., their ethics. These judgements include the many decisions made by a designer and/or design team throughout a project including those around the 1) prioritization of constraints; (2) maintenance and buy-in of stakeholders; (3) cultural or site-specific adaptation; (4) inclusion and equality of access; (5) agency of the learner; and (6) design philosophy (Gray & Boling, 2016, p. 988). During these decisions, the designer's "rules or normative commitments," i.e., ethics, guide them, as well as their personal and professional values (Gray & Boling, 2016, p. 973). Values are rooted in previous experiences, cultural backgrounds, and ontological and epistemological standpoints -- and these may or may not be in line with those of the learner and other stakeholders. Ethical issues emerge as the learning designer's own culture, experiences, and assumptions interact with the design context, as well as the culture, experiences, and assumptions of the learner and other stakeholders -- whether ethics are systematically and explicitly attended to during these decisions or not.

The literature around ethics in LDT covers a range of topics related to the role of the designer including the ways a designer understands their relationship to society and ethics, i.e., their social responsibility (e.g., Moore, 2009), and the ways this responsibility may be enacted to address specific issues such as intellectual property, accessibility and universal design, the digital divide, security and privacy, and cross-cultural competence (Moore & Elsworth, 2014). Additionally, some scholars have explored how to prepare the next generation of designers to enact an ethical and socially-responsible practice (e.g., Moore 2014; Yusop & Correia, 2012).

Cultural Considerations

There are many definitions of culture; Dickson-Deane, Bradshaw, and Asino (2018) argued for a broad understanding of this construct as "the basis for everything that makes one human" (p. 310). Along these lines, Scheel and Branch (1993) described culture as,

> "the patterns of behavior and thinking by which members of groups recognize and interact with one another. These patterns are shaped by a group's values, norms, traditions, beliefs, and artifacts. Culture is the manifestation of a group's adaptation to its environment, which includes other cultural groups and as such, is continually changing. Culture is interpreted very broadly here so as to encompass the patterns shaped by ethnicity, religion, socio-economic status, geography, profession, ideology, gender, and lifestyle. Individuals are members of more than one culture, and they embody a subset rather than the totality of cultures identifiable characteristics" (p. 7, as cited in Young, 2008b).

Culture frames the ways we make sense of ourselves and others, of our relationships, roles, and responsibilities, as well as how we learn and communicate. In education, culturally-relevant and culturally-responsive pedagogy focus on providing meaningful, authentic, learning experiences for diverse students by connecting students' out-of-school lives with course content (Ladson-Billings, 1995; see also indigenous and decolonizing pedagogies, e.g., Smith, Tuck, & Yang, 2019). Such approaches frame learning as a socially- and culturally-situated process. As described above, this means learners' cultures impact the ways they interact with and make sense of a learning design (Subramony, 2004). If learning designs do not support students, the students are not to

blame for missed learning opportunities. Rather, we need to look at the materials and whether they are aligned with students' cultural knowledge. Therefore, considering learners' cultures during all phases of the design process is critical to ensuring a design is both appropriate and meaningful (Young & Asino, 2020).

Much of the literature on the intersections of culture, learning, and technology focus on the ways culture impacts students and their learning, and how to incorporate students' cultural ways of knowing into learning designs. The assumption is that if we understand the cultural knowledge students come into learning environments with, we can better design learning experiences that build off and make connections to this knowledge. When successful, such culturally-relevant designs can promote motivation, engagement, and a sense of belonging. For example, Carol Lee (2003) connected the prior knowledge of speakers of African American English Vernacular (AAEV) to support literary interpretation strategies in the classroom. She found that making connections between students' cultural ways of knowing and classroom content improved motivation and engagement as well as supported social, civic, and political empowerment (Lee, 2003). Similarly, Hatley et al. (2017) used design-based research (DBR) to build a culturally responsive model for computational thinking (CT) and computer programming with African American middle school students. By integrating CT goals alongside storying and identity work, the design supported students' self-efficacy and sense of belonging in computer science (Hatley et al., 2017).

Whether attending to curricula-specific cultural considerations, putting together a culturally-responsible design team, or engaging in reflection on one's own cultural perspectives, creating culturally-responsive designs requires more than following steps in

a model. As Patricia Young (2008b) explained, “The designer must engender culturally sensitive qualities to engage culture- based design” (p. 14). The question becomes, then, how does a designer become culturally sensitive. Thomas et al.’s (2002) extension of ADDIE to include introspection, interaction, and intention emphasizes the importance of self-reflection in culturally-responsive design. In fact, numerous scholars have attended to the role of reflection in instructional design (e.g., Ertmer & Cennamo, 1995; Tracey & Hutchinson, 2013; Tracey et al., 2014; Wills, 2000), although not many explicitly attend to the ways reflecting on one’s cultural norms and values impacts design decisions and practices. Glazewski and Ertmer (2020) described how, through critical reflection, designers may adopt an “ethos of intentionality,” an active role that centers students’ cultural identities. An ethos of intentionality is an asset-based view of students’ cultural identities that embraces cultural ways of knowing and being as valid and valuable. Without this intentionality, it is possible to create learning designs inappropriate for the learners or the context (Glazewski & Ertmer, 2020). In particular, learners whose ways of knowing do not align with those of the designers and/or the design team may become alienated from the learning experience (Subramony, 2004).

Critical Perspectives

Critical theories “seek to reveal… contradictions, social inequalities, and dominances” to reveal the ways power dynamics and social structures impact people's lived experiences (Nichols & Allen-Brown, 2001, p. 226). By understanding the ways social structures, ideologies, and power are re/produced and the material realities they create, i.e., experiences of privilege and oppression, we move away from understanding such experiences as personal success and failure and towards a deeper understanding of

the systemic roots of our experiences. For example, in education, critical research revealed an alignment between disproportionately higher disciplinary rates for black children and rates of racial bias in counties in the US (Riddle & Sinclair, 2019). In other words, black children were more likely to encounter disciplinary action in counties where racial bias was highest. There are many types of critical theories, e.g., critical race theory, feminist theories, and postcolonial theories, but all situate perception and action, i.e., meaning making and behavior, within social, cultural, and historical contexts. It is within these contexts social structures and power dynamics are re/produced, and meaning is subscribed to our everyday norms and practices. However, the purpose of critical theories is not only to critique the status quo and reveal the ways power is structured, but also to take action towards change (Freire, 1973/1998). In education, critical theorists focus on changing policies, structures, and practices that create or perpetuate inequities, to support the emancipatory potential of education.

In LDT literature, critical perspectives are brought to bear on the field itself as well as on the practices and purposes of research and design. In particular, LDT scholars have examined the ways dominant narratives structure our approaches to design and the experiences of both learners and designers (Bradshaw, 2018a; Campbell & Janes, 2021), the ways socially-constructed identities impact learners and designers (e.g., Romero-Hall, 2022; Subramony, 2018), and how specific practices such as critical pedagogy can promote equity in and beyond the classroom (e.g., Horton, Byker, & Heggart, 2017; Bradshaw, 2017; Green & Chewning, 2020). Underlying the critical approach is a belief in the potential emancipatory power of learning environments and, therefore, the importance and responsibility of equity-based learning design.

Narratives are political and cultural resources we use to make sense of the world and ourselves by creating contextualized versions of reality (Bruner, 1991). Scholars have described many types and uses of narratives, including metanarrative, i.e., a story about stories (Raveendran & Srivastava, 2018), dominant or master narratives, i.e., collections of stories that promote shared understanding (Campbell & Janes, 2021), and explicit and implicit narratives, i.e., stories that communicate expectations and values in/directly (Bradshaw, 2018a). What these narrative types have in common is their power -- in structuring discourse, identifying values, and creating shared understanding, narratives indicate what is normal or othered, what is acceptable and not (Campbell & Janes, 2021). For example, narratives in particular academic fields may indicate what type of research is/is not relevant and worthwhile. Deepak Subramony highlighted multiple areas of research missing from the field of LDT including cultural diversity (2004; 2017) and the LGBTQI community (2018). Similarly, Bradshaw (2018b) indicated a lack of discussion in the field on the roles of socio-cultural-historical contexts and social justice.

Campbell and Janes (2021) described the master narrative of LDT as portraying instructional design as "a scientific, process-based system of analysis, prescription, and specification" (p. 232). There is not much room in this techno-centric narrative for individual designers' perspectives or values, or concerns for ethics or justice. Bradshaw (2018a) described how implicit narratives in LDT related to diversity imply "that problems related to racism and equity are so insignificant that simply changing a story character's skin color should be sufficient to solve them" (p. 235). In other words, design practices tend to take up issues of diversity and equity in superficial ways, and these

practices carry with them a perspective on diversity that is equally superficial. Despite the power of these master and implicit narratives, counterstories do exist, and are continually being created (Campbell & Janes, 2021). Counterstories are those that disrupt the master or implicit narrative. In LDT, counterstories can provide insight into the "creative, relational, and political process" of design by focusing on the ways designers actually engage in design and make sense of their process (Campbell & Janes, 2021, p. 238).

Critical theories have also been used to create pedagogical approaches that support students in developing their awareness of socio-cultural-historical contexts, the impact of social structures on experiences of privilege and oppression, i.e., critical consciousness, as well as important subject-area content. Critical pedagogies are based in the work of Paulo Freire, and include feminist (e.g., Shrewsbury, 1987), and indigenous and decolonizing pedagogies (e.g., Grande, 2008; Smith, Tuck, & Yang, 2018). Many culturally-based pedagogies may also be considered critical pedagogies, such as Gloria Ladson-Billings' (1995) culturally-relevant pedagogy (CRP). What makes these approaches 'critical' is the desire to move away from the "banking" or transmission style of education, towards transformative education (Freire, 1970/1993). In other words, these approaches reframe the purpose of education from memorizing facts and content towards learning how social and political structures work and reimagining these structures in ways that promote equity and justice.

Several scholars in LDT have taken the underlying philosophy of critical pedagogy to create and implement specific strategies in their design and research. For example, Horton, Bykerm, and Heggart (2017) described how they implemented hip-hop pedagogy in a seventh grade classroom in Australia. Hip-hop pedagogy is a critical,

culturally-based approach that centers students' out-of-school knowledge and lived experiences alongside the hip-hop culture of resistance, a focus on race, racism and social differences, and action (Akom, 2009). Horton et al. (2017) described how, through an integration of hip-hop culture and digital technologies, students developed two global citizenship practices -- compassion and creativity. Similarly, Warr and Sampson (2020) used the critical pedagogy strategy of engaging in critical dialogue with online doctoral students. Warr and Sampson (2020) created three different modalities for discussion -- asynchronous text-based, asynchronous video-based, and synchronous video paired with asynchronous text. They found students preferred synchronous video chats for critical dialogue, and through this mode were able to reflect on their own experiences and become more aware of multiple perspectives (Warr & Sampson, 2020, p. 866). Finally, Bradshaw (2017) developed an initial guide to support designers in taking up critical pedagogical approaches in their work. She focused on naming, critically reflecting, and taking appropriate action to transform harmful systems, practices, and dynamics (p. 19). For example, under critically reflecting Bradshaw encouraged designers to ask questions such as "How do my perspectives and practices protect me from seeing my own culpability in injustice?" (p. 23). When enacted together, these practices make up a praxis, a term coined by Freire (1970/1993) to describe the integration of action and theory required to implement critical pedagogy.

CHAPTER 2

"HISTORY COMES ALIVE": IMPLICATIONS FOR TEACHER PROFESSIONAL DEVELOPMENT ON PLACE-BASED LOCAL HISTORY[1]

[1] Walters, K., Kopcha, T. J., and C. Lawton. 2020. In M. Ochoa & D. Gibson (Eds.) *Research Highlights in Technology and Teacher Education (pp. 121-130).* Association for the Advancement of Computing in Education.

Abstract

Traditional textbook approaches to history education present history as a static set of dates, names, and events to be memorized. Engaging in historical inquiry in the K-12 classroom is a way to move history education beyond the recall of facts, as it requires the assessment of evidence and the construction of historical arguments and understanding. However, engaging in historical inquiry presents challenges for both teachers and students. This study presents place-based local history as a way to engage students in meaningful historical inquiry. The goal of this study was to identify best practices when preparing in-service history teachers to use technology to engage with local history as a source of inquiry, investigation, and knowledge to support historical thinking. Using case study, we examined the experiences of two teachers who engaged in place-based local history with an academic historian over a six-month period in a rural county in the southeastern US. We then used those experiences to establish a set of design principles and implications that best support teaching practice in this area of education. These design implications may be used to create professional development programs that address the specific needs and challenges related to technology, pedagogy, and historical methodology that emerge from the process of using local history as the focus for historical inquiry.

K-12 teachers are often prepared to teach history as lists of facts and dates to remember, and students are assessed on their ability to recall those facts. This simplistic view, however, fails to account for the constructed nature of historical artifacts and narratives – that is, it ignores the way that social dynamics and individual perspectives influence the stories we tell about the past. Historical inquiry is one way to engage students in constructing understandings of history that go beyond facts and dates (Erickan & Seixas, 2015; Levstik & Barton, 2011; Wineburg 2001). By engaging students in thinking like an academic historian, historical inquiry promotes understanding facts and information as they relate to the causes and consequences of historical events. In other words, historical inquiry engages students in understanding the social and individual perspectives that influence how we construct the stories of the past.

One way to promote historical inquiry is through *place-based local history*. Place-based local history blends historical inquiry with events from the local context, providing students with an opportunity to learn about the events of the past as they impact the people and places in their community (Gruenewald, 2003; Lovorn, 2012). While existing research supports the benefits of historical inquiry (e.g., Leinhardt & Young, 1996, Wineburg, 2001), an ongoing challenge is to support teachers in sustaining inquiry-based approaches to history. It requires teachers to connect school activity with the community, support experiential learning, and promote student-driven inquiry. More importantly, it requires teachers to understand the role of local history in historical inquiry and place-based pedagogy. This can be difficult for teachers to integrate into the current curriculum, which is more often focused on achieving specific state standards in a timely fashion.

Adding to the challenge is technology. Technology supports historical inquiry by supporting access to primary sources (Hofer & Swan, 2014; Waring & Torrez, 2010), organization of content (Saye & Brush, 2002; Spoehr & Spoehr, 1994), student construction of artifacts (Hofer & Swan, 2014; Saye & Brush, 2002), and role-playing activities (Hofer & Swan, 2014). Technology also provides a personal "hook" as students use online data (e.g., ancestry.com) to make interesting connections between their families' and communities' histories (Lee & Molebash, 2014). Thus, an added challenge to preparing in-service teachers to conduct place-based local history is that it also requires technology preparation.

The purpose of this case study was to investigate a place-based local history program enacted by two teachers in a high school in a rural county in the southeastern United States. The goal was to identify best practices when preparing in-service history teachers to use technology to engage with local history as a source of inquiry, investigation, and knowledge to support historical thinking. While several scholars have explored the use of place- and inquiry-based approaches to history at the preservice level (e.g., Crocco & Marion, 2017; Lovorn, 2012; Waring, et al., 2015), few have focused on *how* in-service teachers transform their practice from traditional approaches toward place-based local history. The research questions guiding the study were as follows: (1) What were the benefits of a place-based local history program as perceived by the teachers? and (2) What challenges did teachers face and how did they overcome these challenges?

Inquiry- and Place-based History Education: A Review

In historical inquiry, students engage in the real-world task of constructing a historical narrative. This mirrors the process of historians who typically identify and analyze primary and secondary documents and images to construct a careful argument about the past. Overall, inquiry-based learning can positively affect students' knowledge and discipline-specific reasoning skills (Hmelo-Silver et al., 2007). However, teachers face multiple challenges implementing inquiry-based lessons in history; teachers often lack of background in historical methodology (Lovorn, 2012; Keirn & Luhr, 2012), face environmental constraints including time, administration, and standards (Lovorn, 2012; Meuwissem, 2017), and lack of support throughout the implementation process (Callahan, Saye, & Brush, 2016; Keirn & Luhr, 2012; Lovorn, 2012; Neumann, 2012).

Many professional development and teacher education programs use various technologies to support historical inquiry, from the implementation process (Saye & Brush, 2002) to training teachers in historical methodology (Baron, 2013). In a pre-service teacher education program, Waring and Torrez (2010, p. 297) found that teachers perceived lessons using digital primary sources to teach historical perspective-taking as useful because it: "(a) made history real, (b) challenged assumptions, (c) helped them to understand content, (d) multiple perspectives, and (e) fostered inquiry." For teachers to be comfortable introducing technology in the classroom, however, they must have ample opportunities to participate in inquiry, interpretation, and personal meaning-making themselves (Lee & Moelbash, 2014, p. 161). Additionally, tech-specific challenges can arise for teachers, such as troubleshooting and the need for additional planning time (Hofer & Swan, 2014). Therefore, tech-specific support and experience are needed.

Inquiry-based learning in history also can connect students' learning to their own community. It opens the possibility that historical inquiry can happen in places and spaces familiar to students. This goes beyond simply taking students out to historic spots in their community. As Baron (2013) explains, "Mere proximity to historic places does not provide intellectual access to them" (p. 167). Rather, students must make connections between their own actions and beliefs and the people who lived and experienced past events within that community (Clarke & Lee, 2004). Place-based local history can therefore provide a bridge between students' lives and school, one that results in meaningful learning experiences.

Methods

This case study explored the experiences of two high school teachers who implemented a place-based local history curriculum in a rural county in the southeastern US. The teachers worked closely with an on-site academic historian who provided ongoing support with engaging students in the history of their community as it related to various performance standards. Their experiences were analyzed to identify challenges, if/how they overcame these challenges, and perceived benefits of the curriculum to determine potential design implications of doing place-based local history. In this way, the teachers served as embedded units in our design, helping to reveal the design and support features that helped teachers be successful.

Participants and Context

The place-based local history program was implemented in a rural public-school system where approximately 80% of students live at or below the federal poverty line. The racial makeup of the school system is roughly 44% black, 44% white, and 9%

Hispanic. The participants were two Caucasian male high school history teachers. Teacher 1 (T1) had been teaching US History and American Government for 12 years; teacher 2 (T2) had been teaching US History and dual-enrollment history courses for 23 years. Both worked closely with an academically-trained historian who serves as Director of Experiential Learning for the county. The historian provided ongoing support, helping teachers engage students in the history of their community as it related to various performance standards. The program took place in the T1's inclusion-level US History and T2's dual-enrollment US History courses over a 6-month period.

As described in Lawton, Kopcha, Walters, and Ocak (2020), the place-based local history program consisted of multiple, simultaneously occurring projects that connected classroom activity with the community. Technology played a critical role throughout the program. Students used online resources (e.g., courthouse archives, digitized artifacts) and photo and video editing software to create new historical artifacts that could be shared to support further inquiry. In the current study, T1's students created a database of the names and locations of enslaved persons in their county. T2's students collected oral histories from community members. As students participated in these projects, they were exposed to information that prompted them to ask additional questions or to the desire to create ways of sharing the information/experience with others.

Professional development provided by the academic historian supported the teachers in historical inquiry. First, teachers identified a robust and interesting set of projects that aligned with state history standards. Next, the teachers worked to develop materials (e.g., lesson plans, student materials) for engaging students in those projects; they also planned in-community field trips to local government agencies and locations.

The academic historian supported this process, scaffolding the inquiry process from initial introduction to the historical topic to working with primary resources, collecting information in a systematic manner, and constructing historical narratives around the work. The academic historian regularly co-taught lessons with the teachers, modeling both the process and underlying thinking of historical inquiry over several months.

The authors of this study participated in the design and implementation of the professional development program as described, as well as current iterations of this program. The first author was a graduate research assistant in the university's college of education and worked closely with the other authors and participating teachers to provide support for lesson development. The second author was a faculty member of the same university and lead the professional development workshops as well as provided just-in-time support to participating teachers. The third author was the academic historian, whose role is described throughout the paper; he provided regular on-the-ground support to the two teachers in this study.

Data Collection and Analysis

Both teachers participated in an hour-long interview with the first author. Interviews were guided by a semi-structured protocol that focused on the benefits and challenges of implementing a place-based history curriculum in a local context. Interviews were transcribed and imported into the qualitative analysis software program, NVivo 12. Each interview was first thematically coded using an inductive approach. The coded segments were then analyzed to determine subcategories within each theme. All three researchers reviewed the initial codes and data and made minor revisions through

discussion until consensus was reached. The final code structure was then applied to both interviews.

Results

Three main themes emerged from the interviews: technology, pedagogy, and historical methodology. As shown in Table 2.1, each of these themes contained subcategories that identified the challenges and benefits of the place-based local history program the participants were/are involved with (Tab. 1). For example, each of the three main themes included discussion around both the benefits and challenges associated with using technology and employing pedagogical strategies associated with historical methodology. The three themes and associated sub-themes are presented in detail below.

Technology

Overall, teachers found that technology was critical for locating and digitizing historical content, as well as supporting the construction of content by students. Technology also promoted collaboration between students and allowed them to share their work with a broader community. However, teachers reported not having confidence in their own technological skills beyond supporting students' information seeking.

Benefits of Technology

Technology supported access to both primary and secondary historical sources for students. For example, T2 stated, "[We do] a lot of technology and family database search[es] like familysearch.com and show them how to get into the deed records…they have to find secondary sources and journal articles that have been peer-reviewed ..." Students used archival materials such as probate records, deed records, and digitized 19th-century newspapers to gather information about enslaved individuals and their families.

Using secondary sources to better understand the historical context, students constructed new historical narratives of past members of their local community.

Students also used technology to gather and preserve their community's history as part of an annual gathering at what was once the county's segregated school for African American students. T2 explained, "…at community events we recorded oral histories [and] document scanning so that we have a database for … future primary sources to build more projects with." A key benefit is that the activity was student-led – they recorded and conducted oral histories, as well as scanned photos and documents that community members brought to the event.

Another benefit was that all of these artifacts were then entered into a database for future student research. This required students to collaborate using Google Docs and think about how other students might view and build upon their work in the future. For example, one group conducted initial genealogy and life history research on a formerly enslaved woman and her family, and the next group of students took this research and used it to create a short documentary (T2). In this way, technology went beyond fact-finding and created an ongoing collaborative effort to conduct place-based local history over multiple groups of students.

Challenges with Technology

Teacher 2 indicated considerable uncertainty about his technological competence: "Technology is certainly my weakness, but there's a lot of technology when we are making videos and recording oral histories and editing them down to short usable clips…" His comment indicates both the importance of technology and his perceived inability to support students with audio and video recording and editing. He later noted,

"I'd like to see [students] get paired with a tech person, someone who is teaching audio and video." This suggests teachers need training, or even interdisciplinary partnerships, to develop the skills needed to conduct research and share findings. This might range from constructing a written document to more complex and challenging uses like audio/video recording and editing.

Pedagogy

For the teachers in this study, student discussions and reflections were viewed as critical but difficult-to-implement pedagogical strategies. However, increased agency and connections to the community were perceived as benefits for both teachers and students. These are discussed more fully, below.

Pedagogical Challenges

A large component of successful place- and inquiry-based education is deep student discussion and reflection – both were challenging for teachers in this study. Teacher 1 initially found it difficult to support productive discussion, noting: "I had ground rules [before each discussion], and just I had to stop the discussion after five minutes because they weren't listening to each other, they weren't respecting other people's opinions…"

One effective strategy for teaching students how to engage in a productive discussion of history was to allow them time to process the activity and then lead them through particular questions. For T1, those guiding questions were important because they helped guide the discussion "in the right direction." Teacher 2 similarly explained, "You have to develop a structure and a plan 'cause you can't just jump into something like the slave database without being able to put the things first into a proper context and

without proper training…" This structure was challenging for teachers to anticipate ahead of time. Both teachers found that despite their planning, it often happened in an in-the-moment fashion, in response to information that exposed the ways that specific groups of people were marginalized or unfairly treated in the past. Teacher 1 noted how students began to understand the history of enslavement not just as an event from the past, but also as a theme that was contextually relevant in the present:

> "So those kind of opened up some good discussions about… putting themselves in those shoes… You know [enslaved persons]… lived lives just like us, but they had different struggles, but they were still humans, and they still had feelings … and [I] try to get them [students] to reflect on… what would go through your head if you were told that … you're not gonna be seeing these people [enslaved persons' family members] anymore?"

Teacher 2 similarly explained how students began to develop an embodied understanding of segregation, both nationally and in their own community, by relating it to contemporary issues of social injustice: "You're talking about issues like civil rights, voter discrimination, and the Klan, and this is happening to people they know, parents or grandparents, [or aunts and] uncles. It's hard for it not to be personal."

Pedagogical Benefits

For T2, place-based local history was an opportunity for students to work more closely with the community. Both teachers attributed students' high levels of engagement in the place-based local history curriculum to (1) the fact the students' families had lived in the area for a long time and therefore had personal interest in the research, and (2) students' belief that they were both becoming part of and helping their community in the

process. For example, students regularly engaged in research during local events, and many presented at academic conferences.

Another benefit was that place-based local history cultivated students' sense of agency as historical researchers within their own community. As researchers, students were expected to create their own understandings and knowledge and share it with others; this contrasts the traditional role of the student learning history as de-contextualized facts and dates. Teacher 2 noted:

> "I don't know anywhere else in the country where we have high school students that are conducting original research that rises to the level where I am comfortable, and Ph.D. historians . . . are comfortable taking it to a professional conference and presenting it. I think that… shows the quality of work that high school students can do. A lot of people think high school students, they can't do this. They can. Give them the opportunity…"

Both teachers also thought that implementing this place-based local history curriculum cultivated a sense of responsibility in their students. Teacher 2 commented, "I feel like they really began to feel like they [could] right these past wrongs. I think it certainly makes them aware of it." This sense of responsibility is echoed in T1's recollection of the words of one of his students, "'…These people didn't have a voice, and this is my turn to give them a voice, and to… not forget about them… It's a lot easier for white people to find their ancestry, but… for African Americans it's very difficult and… hopefully with what I'm doing in this I can help.'" For this teacher, student motivation for completing their research projects was based on their real-world impact.

Historical Methodology

A third theme that emerged from the interviews centered on historical methodology. Historical methodology involves analyzing historical evidence and constructing narratives of the past built on focused research, careful analysis of new and existing evidence, and logical reasoning. Students in this place-based local history program were taught to engage in historical methodology by mirroring the processes of academic historians. For teachers in this study, this methodology meant they had to create authentic opportunities for research, as well as scaffold the entire process in response to students' needs. This created both challenges and benefits for teachers and students.

Challenges with Historical Methodology

In order to guide students successfully through the steps of a historical inquiry project, both teachers recognized the importance of being knowledgeable of and comfortable with the historical content of the inquiry. In this study, both teachers had experience with graduate school history programs where they learned historical methodology, as well as the pedagogical experience of at least 12 years in the classroom. That background was important in that it helped them overcome challenges as students engaged in historical inquiry. At the same time, both noted how they personally had to reach a level of comfort and familiarity with the historical research process while finding time for activities and reaching out to the community. Addressing the sensitive nature of place-based local history required an additional level of disciplinary expertise and time for planning than traditional lessons. Teacher 2 explained, "I think to do this you really have to get confident people in their field of study...If they don't know their content

themselves, they certainly aren't going to be able to relay it and take it that step further into conducting the research."

One specific challenge that teachers faced was in developing the scaffolding needed to engage in historical inquiry. Some supports could be predicted and prepared for ahead of time, such as the need for context-building. As the teachers engaged with the students in historical inquiry, however, they began to see more opportunities to scaffold student understanding. For example, T1 was surprised some of his students were not aware that people had been enslaved in their county: "it just blew my mind. Like, you're from the South, it's just amazing… they had no idea. A lot of times they would go through 300 documents [from the mid-1870's] and say there's nothing [about slavery] there." In response, he developed scaffolds to support students in analyzing documents in search of enslaved persons' names around the time of emancipation. This entailed prompting students to attend to specific historical facts (e.g., the date of emancipation) to help contextualize events of the past. Specifically, they compared census data from 1860 to 1870 (i.e., pre- and post-Civil War). Comparing the census data allowed T1 to help students recognize that most of the adults in the county were enslaved just a decade prior to the 1870's. Teacher 1 attributed this realization to the scaffolds he developed, which helped them situate facts and knowledge (e.g., population data in the mid-1800's) in ways that connected the present to larger events of the past (i.e., slavery).

Benefits of Historical Methodology

Both students and teachers learned to work as historians in their local community. This work engaged students in asking "so what" questions about evidence to be used in the arguments they constructed. According to T1, those "so what" questions helped

students identify where to look next for evidence and begin constructing an explanatory narrative:

> "So you're looking at a document, you're putting [data from it] in a spreadsheet, and from doing that you can eventually create or write history about it…. and you can start putting links together and… rationalizing that this happened during this time period . . . [The] 1870 census is really close and so maybe we can find more information because a lot of these [freed people] … probably stayed in [the] County after they were emancipated… maybe I can find … some links."

Teacher 2 similarly noted how this process taught students to find a relevant piece of evidence, then use it to find the next relevant piece of evidence: "[Students] are working like a historian, using the skills that a historian would use which are applicable in all the humanities…I think it's important work." Working like a historian, i.e., engaging in the historical research process, is an essential skill both teachers aimed to develop in their students.

Another benefit of the place-based local history program was its emphasis on the local community and applying historical inquiry in meaningful ways. Teacher 2 explained that the local connection to places and people they know is what made history "come alive" for students: "[History] becomes real to them in a way that it can't be to them if they're sitting there in a classroom... I can talk about [local historical] events and people. So that's much more real, concrete thing for them." Connecting what students read in documents to places in their own community grounded both teacher's lessons in something concrete for the students. The teachers noted making use of the local context to connect history with their sense of community. Teacher 1 explained, "it's in your

community… [these] people have walked in the same spots you have and … they created history from the things that they did and eventually you'll be creating history from the things you did [and] maybe someday someone will be looking back at what you did and wondering…" Occupying the space of a historical event assisted students in connecting the past and present, and in seeing themselves as historical agents who were contributing members of their community.

Table 2.1

Challenges, Benefits, and Implications for Place-Based Local History Education

Theme	Challenges	Benefits	Design / PD Implication
Technology	Teachers uncomfortable supporting students' technology use beyond fact finding and information seeking (perceived incompetence)	Students learned to access and locate primary and secondary historical content, collect and digitize new historical content, and construct historical content individually and collaboratively.	Teachers require support in technology-assisted content creation.
Pedagogy	Place-based learning required additional work and planning. Students struggled to engage in deep reflection and discussion. Teachers unsure about how to handle social justice issues.	Students developed stronger community connections/ relationships. Students had greater agency and were engaged and motivated to work on the project	School administration support, increased planning time and PD on sensitive topics. Provide support for building community connections/ relationships. Give students time to express their thinking in different modalities (written, spoken, art, etc.).
Historical Methods	Teachers needed to scaffold historical methodology and	Students engaged in historical thinking that related to their own	Create opportunities for interdisciplinary teams. Create structures for creating products/artifacts that

	engaging students in inquiry. Also needed a reactive approach to teaching, which takes time and on-the-spot pedagogical decisions.	community; "history comes alive." Teachers and students learned to apply history in a way that was meaningful to them and their given context.	incorporate perspectives on history.

Discussion

This study strongly supports previous literature on historical inquiry. It is common for teachers to struggle with using technology to move students beyond fact-finding and information gathering (Brush & Saye, 2009; Hofer & Swan, 2014). Likewise, it is common for teachers to need support with inquiry-based methodology. Historical inquiry requires teachers to adopt practices that are often counter to their previous experiences in the history classroom and their own understanding of teaching history (Callahan, Saye, & Brush, 2016; Crocco & Marino, 2017). They need professional development and just-in-time support that helps them, and their students engage in deeper reflection and make sense of the issues that emerge from the history of their community (Danker, 2005). This requires time, support, and ongoing effort in an already taxed teaching environment.

What this study contributes is insight into practices that not only engage students in doing historical inquiry, but also in making connections between their inquiry and the people and events in their community. In other words, the teachers in this study developed both the historical methods (e.g., analysis of primary sources) needed to interpret the past and the historical consciousness needed to make connections between their community's past and present. Engaging in place-based inquiry alongside an

academic historian supported teachers in this development. Teachers reported it was beneficial to visit places in the community as they learned about the historical events that created that community. Through interaction with people and the artifacts of history that remain in the community, teachers made meaningful connections between the past and present.

Broadly, historical consciousness is our ability to think in time—to imagine past, present, and future. The ability to identify connections between the past and the present, and to reflect on these connections to make sense of the present, represent what Duquette (2015) describes as a narrative level of historical consciousness (grounded in Rüsen, 2004). One teacher's use of the phrase "history comes alive" demonstrates this advanced level of historical consciousness. In the teacher's perspective, the past was pulled into the present by becoming "alive," and therefore both relevant and meaningful to the lives of students now.. The development of historical consciousness in teachers is important for at least two reasons. First, historical consciousness is critical to all people to expand our life view beyond our selves and is used as an asset in decision making and identity development (Ahonen, 2005). Second, teachers must be prepared to support students in their development of a reflective historical inquiry practice. This involves understanding what prompts and activities students need to move from non-reflective historical inquiry (i.e., interpretation of the past and present as separate and unrelated) towards a fuller understanding of how the past impacts the present, and therefore, how the present will impact the future (Duquette, 2015).

Making history come alive helps address ongoing issues in the teaching of history. Wineburg (2001) and others (e.g., Booth, 1983; Leinhardt & Young, 1996;

Levstik & Pappas, 1992; Seixas, 2015) have long advocated for teaching history in a way that mirrors the work of academic historians: the goal is to support students in learning the facts of a historical event, the complex context in which that event took place, and the historical methods needed to construct a narrative. In this study, this understanding was developed by exploring how local history was constructed by the people who tell that history. Both teachers noted how the program engaged students in telling untold stories of their own community.

Place-based local history carried an aspect of social justice in this study. Although it may be expected that a local history lesson in the US south will incorporate discussions of racial inequity and oppression, the way these difficult topics are approached is critical. Developing students' historical consciousness requires negotiating the complexity of social justice issues rather than presenting a simplified textbook narrative. Additionally, as historical consciousness develops, students uncover new ideas and ways to connect the past and present. Pedagogically speaking, this was challenging. Teachers were unsure how to handle the sensitive issues of racial injustice and imbalance of power associated with slavery and segregation. While exploring these issues was a powerful approach, it also required training and understanding that teachers often have not had the experience to develop. On-site support was critical in supporting teachers as these issues emerged.

In this case, the emergence of social justice issues presented a tension with which teachers needed to deal. As students connected with community, they learned that history is something that happens to the people they know in the place they live. This grounds history in a local, shared, space. However, this project often focused on the stories of people who had been marginalized and whose histories had not been told. The idea of a

"shared" community history is then called into question by asking "whose stories get to be part of this history?". Although uncovering this contradiction presents an opportunity to delve deeper into historical inquiry, it also presents challenges for teachers such as how to support students in critically analyzing and reflecting on the socio-historical-cultural positions of various perspectives.

Implications

One immediate implication is that teachers need professional development and additional time to fully engage in place-based local history. In order to support their students in historical inquiry, teachers must first develop their own understanding of historical methodology. Although history teachers are trained in historical content, approaching historical questions, gathering and assessing evidence, and examining and challenging existing narratives pose a challenge. Additionally, teachers must learn to create and provide scaffolds for students throughout this process, and to engage in deep reflection about potentially sensitive issues. As well, teachers must learn how to connect with the community as a source of historical knowledge. In this study, support was provided by an academic historian, which suggests how working with a local university or community-based historical society could be a good step towards learning and practicing the methodological aspects of historical inquiry. This supports Neumann's (2012) argument for collaboration between history teachers, historians and history faculty, and professional developers to support teachers' historical thinking abilities. Additionally, building and sustaining relationships with community leaders is critical to conduct historical research with meaningful benefits for all involved – students, teachers, and community.

Another implication is that fact-finding and information-gathering activities should be viewed as foundational pieces of a larger, student-driven project. In this study, multiple projects grew into research papers presented at academic conferences, a documentary film, and visual displays in the community. Students engaged with the historical research critically and creatively through multimodal products shared with a broad audience (Dayton-Wood et al., 2012). This supports student engagement and helps bridge the gap between the classroom and the community, establishing students as community members in a new way. Technology can play an important role in this process – not only in finding facts and documents of history, but also in constructing those into a meaningful narrative. This can be supported in a number of ways, including ongoing written and photo journaling (e.g., blogs), reflection prompts, and examples of telling history available from professional historical associations. Discussion and reflection are critical components of this process; they allow for critical engagement with the material. Students must learn to look at historical material to see what is and is not included, at who is writing the depiction and why (Wineburg, 2001). Discrimination and judgment are important skills for historians, and difficult for students to master; this study suggests that such skills can be cultivated with scaffolding, support, and technology.

Conclusion and Next Steps

Wineburg (2016) explained how the goal of teaching history is not to create historians but to create better thinkers who are prepared "...for the vocation of citizen" (p. 16). Historical inquiry requires students to locate and assess evidence and to consider multiple perspectives, skills they need to become informed and engaged participants in the life of their community. Place-based local history is a powerful way to engage

students in developing these skills. However, it requires new practices and approaches to learning that educators and scholars have only begun to understand. This study represents an initial attempt at identifying design considerations and implications. It is our hope these design implications may help guide others looking to do similar work in their own localities.

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CHAPTER 3

HUMANITIES EDUCATION IN THE US RURAL SOUTH: DESIGN, DEVELOPMENT, AND PRACTICE[23]

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Abstract

The purpose of this paper is to present the results of a humanities education project that took place in a middle school in the rural US South. Through a partnership between a state university and local school system, K-12 teachers engaged in two years of professional development on the integration of humanities education into the regular curriculum through project-based learning (PjBL). During this project, teachers were required to personally and professionally engage with racial tensions rooted in the history of the local community as they learned to implement their PjBL activities. This context is central to the design and implementation of the project as presented in this paper. We detail three learning strategies that emerged and how these were taken up by teachers: the personalization of history, historical perspective taking, and modeling a critical position. We discuss the implications of these strategies for integrating PjBL and humanities education in a way that attends to socio-cultural-historical contexts. Implications for the practice of learning design in similar contexts are also discussed.

Keywords: Project-based learning, humanities education, social justice, design-based implementation research, rural, middle school, US South, reflexivity

The racial and economic iniquities of the past continue to impact rural areas of the U.S. South. This is especially noticeable in K-12 education, where those inequities often manifest as lower performance on standardized tests and fewer graduates entering four-year colleges than the national average (Lavalley, 2018). The rhetoric around educational reform in rural areas, however, often focuses more on escaping poverty than addressing the longstanding roots of that poverty (Schafft, 2016). Whether intentional or otherwise, this focus affects students in profound ways. Some students develop disfavorable narratives about the place in which they live that, over time, lead them to leave rather than stay and improve the issues within the community (Schafft, 2016). Others remain in those areas after graduating high school, often struggling to understand why they are viewed as having failed for staying in the place they call home (Jones, 2006; Schafft, 2016).

Humanities education is one way to introduce educational reform in rural and disadvantaged areas that can help address the longstanding roots of poverty. In this paper, the term *humanities education* represents educational reform efforts that go beyond a single class (e.g., language arts; history) or set of content-area standards. Such efforts emphasize human agency and creativity through stories of collective action (Anderson, 2002). This typically involves students engaging in sustained inquiry by taking differing perspectives around issues that are present in the community (Walker, 2009). It is a humanizing mode of thought that attempts to understand people as "free and responsible agents who bring about a world" (Anderson, 2002, p. 136). Such perspectives are rooted in the work of John Dewey (1916) and Paulo Freire (1970), who promoted the idea that schools should teach about democratic society and engage

children in debate about fundamental notions such as equality and justice. Studies have shown that humanities-based approaches to K-12 education can help disadvantaged youth improve their performance on content-area standards while also understanding themselves through their relationship with the people in their community (e.g., Hadley, Burke, & Wright, 2019; San Pedro, 2016).

While humanities education has tremendous potential to improve education in rural areas, it is often overlooked as a viable option for reform. As noted by Schafft (2016), a more common view is that school improvement will result from generating competition between schools. Such neoliberal views often lead to reform policies that focus on mastering standards rather than better understanding oneself in relation with the development and growth of the community (Schafft, 2016). For example, recent national policy in the US suggests that improving achievement in STEM education will lead to economic prosperity (Honey, Pearson, & Schweingruber, 2014). While this policy is undoubtedly important, it largely focuses on improving subject-matter outcomes rather than the integration of place and community in K-12 education. As a result, current educational reform tends to overlook a critical opportunity to equip students with the skills needed to negotiate the challenges that rural communities face today (Schafft, 2016; Jones, 2006).

The purpose of this paper is to present the results of a humanities education project that took place in a middle school in the rural US South. Through a partnership between a state university and local school system, K-12 teachers engaged in two years of professional development on the integration of humanities education into the regular curriculum through project-based learning (PjBL). That work required them to

personally and professionally engage with the racial tensions rooted in the history of the local community as they learned to implement their PjBL activities. At the end of the two years, we collected data from students and teachers to assess learning outcomes and inform the overall design of our approach to humanities education. The research questions guiding our study were:

- How did our approach support teachers in meeting state standards?
- What aspects of humanities education were taken up by the teachers?

Project Design: Project-Based Learning with a Humanities Focus

Teachers engaged in two years of professional development on project-based learning that was blended with a humanities focus. Project-based learning (PjBL) is an instructional approach that supports student engagement in real world, or "nontrivial," projects and problems (Blumenfeld et al., 1991). As shown in Table 3.1, students typically lead an investigation centered on a driving or challenging question, synthesizing their findings into a shareable artifact (Barron et al., 1998; Larmer, Ross, & Mergendoller, 2017). Student learning is situated in an authentic context, allowing for both discipline-focused exploration and interdisciplinary learning. Students produce an artifact that reflects their learning and application of skills, and that artifact is made public for others to view. Both teachers and students reflect on the process and their learning throughout the PjBL activity.

Table 3.1

Intersections of PjBL and Humanities Education

PjBL Element*	Description*	Humanities Component
Challenging Problem or Question	An "open-ended, inspiring, and understandable" driving question frames the project.	Teachers identified questions around issues of poverty and segregation after viewing the NARA photographs (e.g., How do you and others impact your community? How do our past experiences impact our present? How are people affected by and from stereotyping?)
Sustained Inquiry	Student-generated questions are researched throughout the project by gathering / interpreting data, building evidence, and creating and evaluating solutions.	Focus on identifying and finding evidence of multiple perspectives, as well as engaging with and making sense of these perspectives. Through this process, students construct, and share, their own perspectives.
Authenticity	The project relates to "students' concerns, interests, or identities" and/or involves "real-world tasks, tools, and quality standards."	Student work was situated in the local historical context; NARA photos were used to explore social issues and take perspectives relevant to the current culture of their community.
Student voice and choice	Students have "significant responsibility" in the project, including making decisions about the questions, resources, tasks, and products used/ created.	Students chose what photographs to focus on, what product to create, and how to present their findings.
Public multi-modal products	Student work is available to people outside of their classroom. Students publicly explain their work, including their inquiry process and decision-making.	Student work was presented publicly in the schools (e.g., art hung in hallways) as well as a community event hosted at a local art/cultural center.
Reflection	Throughout the project, students and teachers reflect on what content was/is being learned as well as the inquiry process itself.	Reflection occurred largely through in-class class discussions.

*Note: Descriptions and direct quotes are taken from the Buck Institute for Education (2019) Project Design Rubric

The benefits of PjBL are supported through research. Tamim and Grant (2013) and others (e.g., Hmelo-Silver, Duncan, & Chinn, 2007) have reported that students of teachers experienced in PjBL improved in their motivation, engagement, learning, and acquisition of academic and non-academic skills. Although the exact nature of student work products is dependent on the content that is addressed, most PjBL products are multimodal. In other words, student work includes more than one mode of communication, such as text, images, color, and use of space. Multimodality as a pedagogical approach centers students' meaning making practices by providing them opportunities to engage in both artifact creation and the assessment of multimodal resources (Kress, 2010). Students construct and interpret multimodal resources as a way of making sense of the world around them, as well as to engage in social critique (DeJaynes and Curmi-Hall, 2019).

While both PjBL and humanities education have their own rich literature base, the intersection of these is less often articulated as a form of applied instructional design. As shown in Table 3.1, the humanities focus in this study came from the way that teachers created opportunities for students to take differing perspectives and explore issues that were present in the community. Those opportunities came largely from a series of photographs taken within the community in 1941 that are publicly available through the National Archives Records Administration (NARA) (see Figure 3.1).

Figure 3.1

Sampling of 1941 National Archives Records Administration (NARA, ca. 1922-1947) Photographs and Original Captions.

"These pictures were taken inside the newest and best dairy in [Town]. Unlike most, the buildings are wired for electricity -- a recent improvement, made possible by REA -- and a new compressor cooler has just been installed. Milking, however, is done by hand. The owner has two [African-American] hired hands to help with the job." (#521309)

"This one-room cabin is the home of an ex slave. Too old to work, she is taken care of by the descendants of the family to whom she belonged." (#521416)

"[City Name], Saturday Afternoon." (#521250)

"African American tenant house." (#521273)

Each teacher produced at least one project-based activity that integrated the photos to support student-driven inquiry that aligned with state standards, resulted in a multimodal product that reflected student learning, and encouraged students to take differing perspectives around the social issues that have been and, in many cases,

continue to be present in their community. Our thinking was that the photos would offer students a rich, authentic context for PjBL activities that provided a way for students to explore social issues and take perspectives that are relevant to the culture of the community (Danker, 2003; Ladson-Billings, 1995). Engaging with multiple perspectives helps students begin to see how the past connects to their experiences in the present, which helps cultivate a stronger connection to and understanding of their community (Lovorn, 2012; Smith & Sobel, 2014; Walker, 2009).

Methods

Context

This project took place in a rural community in the US South whose schools serve approximately 3,500 students (44% white, 41% black, and 11% Hispanic). Like many rural communities in the South, its history is one of racial inequality and those who have challenged it, spanning from the practice of slavery through Jim Crow and the Civil Rights movement. Although the overt racial and economic segregation of the past has faded with each successive generation, the structural remnants persist: approximately 30% of the community's under-18 population currently live at or below the federal poverty level.

In this context, there is an opportunity to explore and construct narratives that reflect the community as the vast majority of residents have experienced it. Residents over 60 have clear memories of racial oppression and the struggle for civil rights, and some can still trace their lineage back to family members who were at one point enslaved. These older generations have their own stories to tell of the hardships,

victories, and changes that have transformed the place of their childhood into the one in which their grandchildren and great-grandchildren are now growing up.

This context, then, positions this study as one that explores how learning design might be taken up to address issues of social justice. The teachers in this study were not just learning to implement PjBL in their classrooms. They were also challenged with integrating photos of the community's past into their teaching. Those photos offered a glimpse of the racial and economic inequality that existed in 1941; they were included as part of a series of reports on rural life funded by the Works Progress Administration. The report on the community that serves as the context for this study highlighted the way that racial segregation intersected with the community's shifting economic structures (see Wynne, 1943). For the research team, this context demanded sensitivity, both to the history behind the photos and the needs of the teachers who would introduce them to their students.

Participants

Six middle school teachers participated in this study. One identifies as a white male, four as white females, and one as a Black American female. Their number of years teaching spanned from 3 to 24, with a median of 11 years in the classroom. For all but one, this teaching experience has occurred entirely in their current county. Teachers in the study received a stipend for their participation in the professional development.

Teacher Professional Development

The two-year PD program focused on designing, developing, and implementing learning activities that met state standards and integrated the NARA photos and local community. The PD drew largely on the materials produced by the Buck Institute for

Education (BIE) that supports project-based learning in K-12 settings (Larmer, Ross, & Mergendoller, 2017). Specifically, teachers used the BIE lesson template tools to plan for the development and implementation of PjBL. The template structured teacher lesson planning in a way that addressed the PjBL elements noted in Table 3.1 (e.g., driving question; sustained inquiry; student choice and voice).

The PD entailed an annual day-long summer workshop, followed up by regular meetings and in-classroom support throughout the year. As shown in Table 3.2, Year 1 focused on developing and implementing a PjBL activity, whereas Year 2 focused on improving the activities from Year 1 while also increasing the number of participating teachers and subject areas represented.

Table 3.2

Professional Development (PD) Activities and Focus by Project Year

PD Activity	Year 1	Year 2
Summer Workshop	• Explore NARA photos • Identify photos relevant to specific content areas • Develop PjBL around photos • Create an implementation plan	• Recruit additional teachers • Vertical and horizontal alignment of themes across grades and subject areas • Peer feedback • Design a second PjBL lesson or expand on initial lesson
Regular Meetings	• 2-3 meetings per year at grade level • Individualized planning and implementation support	• 2-3 meetings per year at grade level • Individualized planning and implementation support
In-Classroom Support	Support during implementation; • Provide description of overall project to students • Access to/creation of materials to support student inquiry	Support during implementation; • Pre-class discussions and post-class feedback • Connecting overall project goals and individual classroom goals/lessons. • Access to/creation of materials

As shown in Table 3.3, the teachers' PjBL activities took place across disciplines such as social studies, English Language Arts (ELA), mathematics, and science. Across those six teachers, nearly 100 students participated in a PjBL activity. For the majority of those students, this was among their first PjBL experiences that incorporated the community. In total, 36 student projects were included for analysis.

Table 3.3

Overview of PjBL Activities Created by Middle-School Teachers

Course	Lesson Title	Description	Gr.	Content Standards
Mathematics	Paint the Past	Students calculated surface area situated within past and current photographs of local historical sites.	6	Mathematics: Geometry
Current Events and Critical Thinking	[City Name]'s Past	Students analyzed photographs to develop historical perspectives. Choose between writing a story about a photograph or a presentation on the development of a technology in the photo.	6	Social Studies: Information Processing
Current Events and Critical Thinking	This is us: [County Name]	Students developed presentations where they wrote how each person in a photograph contributed to their community as a hero: a NARA photograph, a local hero, and a selfie.	6	ELA: Reading for Information
Life Science	Ecosystems and How they Work	Field work including local hike and soil sampling around human use of environment	7	Life Science
ELA	Historical Narratives	Exploration of bias and point-of-view through the creation of historical narratives	7	Social Studies: Literacy in History
Art	Community and Quilting	Students created quilt tiles to represent personal histories	8	Visual Art: Creating and Connecting

Research Design

The current study is part of a larger Design-Based Implementation Research (DBIR) project that sought to integrate humanities education into the K-12 curriculum. DBIR (Penuel, Fishman, Cheng, & Sabelli, 2011) emphasizes an iterative process of developing, testing, improving, and retesting a research-driven educational intervention through deep collaboration with local contexts (see also Cobb et al., 2003). As noted by Penuel et al. (2011), DBIR emphasizes *co-design,* meaning researchers and local stakeholders (e.g., administrators, teachers, students) work collaboratively to shape and accomplish the driving goals of the project. Involving stakeholders (e.g., teachers, curricular coaches) in iterative co-design places a focus on sustaining change within the school system over time; it leads to the formation of research-based learning principles and practices that advance theory while having relevance in an applied context (Penuel et al., 2011).

DBIR is an umbrella method that allows for various approaches to data collection and analysis. With each iteration, the research team improves the intervention while focusing more deeply on the constructs and mechanisms that support learning. With that in mind, the current study builds on our prior research that describes our theoretical approach to humanities education (Lawton et al., 2020) and the impact of our approach on teachers and students (Walters et al., 2020). The goals for the current study were to establish the efficacy of our approach. We first wanted to understand the ways in which our approach to humanities education supported teachers in meeting state standards (RQ1). Second, we wanted to identify the elements that became most salient for the teachers (RQ2).

Data Collection and Analysis

Data were collected from both students and teachers with approval from our Institutional Review Board's (IRB) guidelines for confidentiality. Student data came from scoring their PjBL projects completed at the end of each activity. As shown in Table 3.3, each of the six teachers met different standards, ranging from math to ELA and art. Thus, we developed and used different rubrics to analyze student work, one for each PjBL activity. These were developed collaboratively with the teachers to ensure validity. For example, one teacher's PjBL unit addressed the standards for calculating surface area in math. The corresponding rubric evaluated student calculations on a series of surface area questions that related to the NARA photographs, assigning a point for each correct calculation. Another addressed the social studies standards associated with literacy in history. The corresponding rubric included criteria such as Narrative Voice, Use of Historical Evidence and Historical Orientation (ARCH, 2013), scored on a 3-point scale that ranged from Demonstrated Proficiency (3) to Approaching Proficiency (2) and finally Not Proficient (1).

Teacher data came from two semi-structured focus group interviews conducted via videoconference at the conclusion of the two-year professional development effort. We chose videoconferencing because face-to-face interviews were not possible due to COVID-19 restrictions. Interview questions explored the teacher's experiences with the project and PD, such as what the teachers learned and the perceived benefits for students.

Each interview was transcribed and analyzed for thematic patterns around the research questions. Analysis consisted of consensus building as detailed by Braun &

Clarke (2006). Each researcher first conducted an independent reading, coding sections of the transcript with shorthand descriptors for underlying ideas, assumptions, and concepts (e.g., critical thinking, teacher challenge, community connection). The team then met to discuss those descriptors, grouping them under larger thematic headings. These themes were then reviewed as each member revisited the transcripts to mark sections using the larger theme headings. They met one more time to establish consensus about the final themes and examples of each theme.

Positionality Statement

Positionality refers to an understanding of one's identity and the way this identity impacts ways of knowing. This concept is critical in research where the researcher is as much a part of the data collection and analysis as the methods and tools (Bourke, 2014). Our positionality statement acknowledges that we are white scholars who live in communities that are different from that of our participants. We have not personally experienced the types of racial oppression many of our participants have. Being aware of this, we intentionally adopted a reflexive design and research practice entailed ongoing reflection about our perspectives in relation to that of the research participants and their impact on the research study. This became particularly important when navigating the tensions that arose around long-standing racial and economic injustices in the community, as well as when determining how to support both teachers and students in exploring those tensions. This reflexivity also supported our DBIR approach in that it positioned the teachers as co-designers; we created regular opportunities for the teachers to give input that helped shape the direction and focus of the project as it evolved. Thus, our work centered and valued the different ways of knowing and knowledge each partner

brought. Our goal was to continuously develop our understanding of the design through our interactions with each other, the teachers, and the students.

Findings

Research Question 1: How did our approach support teachers in meeting state standards?

One immediate goal for our project was to make sure that our approach supported teachers in meeting the state standards. As shown in Table 3.4, the mean scores on student work ranged from 75.00 to 97.50 (out of 100), suggesting that the standards were met or exceeded. Data from teacher interviews revealed that the teachers felt their students were engaged in the PjBL activities and met the intended standards. One teacher stated that her students who "do not normally" speak up in class were excited to discuss the photographs. The teacher described how students recognized locations in the photos (e.g., "I know that place!" or "I've been there!") and felt that this familiarity supported the students' engagement with the activities. Another teacher stated the approach to humanities education supported the way she likes to teach, using primary historical sources in an ELA course. This interdisciplinary work supported students meeting Literacy in History writing standards.

Table 3.4

Student Artifact Scores (out of 100) by PjBL Activity

Course	Lesson Title	Gr.	Content Standards	Rubric Items	N	M	SD
Mathematics	Paint the Past	6	Mathematics: Geometry	Represent 3-D Figure; Calculate Surface Area; Apply Calculations	6	95.00	5.48
Current Events and Critical Thinking	Eatonton's Past	6	Social Studies: Information Processing	Organization; Elaboration; Historical Orientation; Writing Conventions	10	97.50	12.08
Current Events and Critical Thinking	This is us: Putnam	6	ELA: Reading for Information	Use of textual evidence; integration of multimodal information	13	75.96	21.02
Life Science[a]	Ecosystems and How they Work	7	Life Science	N/A	N/A	N/A	N/A
ELA	Historical Narratives	7	Social Studies: Literacy in History	Narrative writing organization, voice, ideas, and conventions; Use of historical evidence; Understanding of historical orientation	7	88.89	4.81
Art[a]	Community and Quilting	8	Visual Art: Creating and Connecting	N/A	N/A	N/A	N/A

[a]Data were not available in these classes due to constraints associated with COVID-19

Research Question 2: What aspects of humanities education were taken up by the teachers?

Three themes emerged from the focus group interviews related to the way teachers and students took up aspects of humanities education: the personalization of history, historical perspective taking, and modeling a critical position. The personalization of history refers to the way that students recognized their own experiences as meaningful and part of something larger than themselves (e.g., the events of the past). Four of the teachers discussed how students struggled initially with seeing their personal, day-to-day experiences as meaningful. The art teacher stated students had to "give themselves permission to use their experiences…for their artwork." Other teachers described similar experiences, explaining how eventually "it clicked" as their students created artwork, narratives, multimodal presentations, and other artifacts around their personal experiences.

A key aspect of this "clicking" was the act of connecting the students' experiences with the broader community. In the *This is Us* activity, students identified specific details of their own lives (e.g., what they do for fun; what they like about where they live) before imagining what the lives of past youth in their community may have looked like. They then created multiple artifacts linking selected NARA photographs, YouTube music videos, present-day images, and locations in the community. Through this creative process, the students began thinking about themselves as if they were living in the past. This helped them create contrast between how things *used to be* in the community as compared to how they *currently are.*

The comparison between past and present reflects the way that historical perspective taking took place in this study. Historical perspective taking is a process of "explor[ing] and reconstruct[ing] the internal states of a person of the past" (Nilsen, 2016, p. 375). As Nilsen and others (Endacott, 2014; Rüsen, 2005) have noted, historical perspective taking focuses on the stories of individual people and their experiences rather than overarching and impersonal historical narratives. In this study, all the teachers described how they created opportunities for historical perspective taking. Five described how they helped students understand how specific experiences of people from the past related to larger historical themes in the present. As one explained, "Like the civil rights movement…it really comes down to those little moments, that one day at the lunch counter… it's the small moments that make our lives." Another described how she helped students focus on how their day-to-day lives were similar to the lives of the people in the photographs. Her students' projects contained writing that explored how moments of celebration and joy are a natural part of life, both in the past and in the present.

Another way that teachers connected the past with the present was to engage students in constructing historical fiction. In the *Historical Narratives* activity, students created characters that were similar to themselves—the same age and living in the same place—but also not like them in the issues they faced, such as segregation. The students achieved this by blending their personal experiences with the issues of the past. The teacher explained, "This helped students construct believable characters by connecting to their characters' emotions and desires in unfair circumstances" -- emotions such as confusion, distress, and anger over "racial discrimination and the desire to fight for their

interracial friendships." This suggests how historical perspective taking allowed students to understand a national historical event, segregation, through the everyday experiences and emotions of someone their own age, in their own town.

The final theme that emerged centered around the critical position two of the teachers modelled for their students. A critical position refers to the way that teachers drew upon student assumptions, mindsets, and experiences to support difficult conversations about race, economics, and change in the classroom (Freire, 1970; Jones, 2007; Ladson-Billings, 1995). In one 6th grade classroom, students saw black and white photos and assumed, because they were of the past, that they depicted slavery. The teacher described how this assumption reflected the students' understanding of their community, based largely on the dominant narrative of the past that focused on racial inequality and oppression. Her response was a critical one, pushing back on the dominant narrative in an attempt to construct a new, more positive one. Specifically, she used activities such as "finding themselves in the pictures," and identifying examples where "kids [were] just kids," in order to make connections between the past and the present. She also emphasized an image depicting a black landowner, suggesting that not all of the dominant narrative was accurate. This eventually helped the students learn that the context of the photos was not slavery but actually the experiences, positive and negative, of both black and white sharecroppers.

Discussion

In this paper, we applied a humanities focus to the core elements of PjBL. This is not necessarily a new idea; Youth Participatory Action Research (YPAR) similarly blends PjBL elements (e.g., sustained inquiry, student voice and choice, multimodal

products) with a focus on perspective taking within a local context (Burke et al., 2018). What is unique to this paper, however, is the way PjBL and humanities education were implemented in a community in which long standing issues of racial and economic inequality persist today. The inclusion of the NARA photographs challenged both the teachers and us, the designers, to find ways to drive and sustain inquiry while allowing students to have their own voice and choice, take multiple perspectives on sensitive issues of the past, and make connections with the community in the present.

The results of our study suggest that our approach was successful in several ways. To begin, the humanities-focused PjBL activities developed in this project met the immediate goal of achieving state content standards. Project mean scores consistently fell between "Approaching Proficiency" and "Demonstrated Proficiency," which suggests that the teachers were able to successfully integrate their PjBL activities into the classrooms. This outcome is worthy of note. Teachers often avoid PjBL activities out of concern that they require too much time to meet the required standards (Tamim and Grant, 2013). This study adds to a growing body of literature that suggests the opposite -- that teachers can engage students in PjBL while mastering content-specific standards (e.g., Blumenfeld et al., 2000; Boardman et al., 2021; Condliffe, 2017; Krajcik, McNeil, & Reiser, 2008).

At the same time, our results suggest that our approach to humanities-focused PjBL was not merely a content-delivery system. The teachers' PjBL activities created opportunities for going beyond the standards through three distinct learning strategies: the personalization of history, historical perspective taking, and modeling a critical position. These strategies provide insight into the ways that the teachers in this study

balanced the elements of PjBL with the goal of implementing humanities education. With regard to the personalization of history, some teachers had students draw connections between the activities portrayed in the photos and their personal and/or family's past. Others built a personal connection by engaging students in exploring how the photos related to regional and national events in history (e.g., sharecropping; changes in economic structures). Regardless of the approach used, the importance of creating personal connections with history was evident. It created an opportunity for our teachers to move beyond the analytic aspects of historical thinking towards the formation of one's own identity that can occur when making personal connections with curricular materials (Barton & Levstik, 2004). Without a personal connection to the events of the past, many students fail to see their identities represented in the history classroom -- particularly those marginalized by gender, race, and/or economics (Barton & Levstik, 2004; Hill Collins, 1991).

The focus on making a personal connection with history lent itself to driving and supporting students' sustained inquiry which, in this study, took the form of historical perspective taking. The photographs showed places familiar to the students, but from a time when different rules and norms regulated political, economic, and social life. Multiple teachers noted how this familiarity helped the students gain perspective about the events and people depicted in photographs. By taking on the perspectives of individuals from the photographs, students began to see themselves as if they were the people in the photos—people who took action and contributed to the creation of the present-day community. It made the emotions and relationships portrayed in the images more relatable for the students, which then became an entry point into more complex

conversations about the racial and economic challenges that the community has faced over time. The ability to relate to and empathize with the people of the past is a goal of humanities education (Anderson, 2002; Walker, 2009), further suggesting that our goal for humanities education was realized in some way.

Personalizing history also supported opportunities for some teachers to engage in taking a critical position, exploring how the past coincided with or contradicted the students' experiences in the present. Several teachers noted that they intentionally shared stories that pushed against the dominant narrative. For example, one emphasized the uniqueness of a 1940s African American landowner in order to challenge the students' overall assumption that all non-white residents were enslaved or poor. In this way, the teacher took a critical position that challenged the single dominant narrative of the community. Insight into the way that the teachers engaged in taking a critical position is important. Previous studies suggest direct engagement with critical issues and exposure to a diversity of perspectives can support students in developing critical positions (Barton & McCully, 2012; Parkhouse, 2018). However, this remains a complex and difficult task for teachers requiring a deep understanding of both social justice issues and their students' histories, cultures, and previous knowledge (Ladson-Billings, 1995; Parkhouse, 2018; Cummings, 2019). Finding ways to include rather than avoid conversations around sensitive issues such as racial and economic inequality can improve education for students whose lives are directly impacted by those issues (Cummings, 2019; Ladson-Billings, 1995).

Implications

One implication from our study is that it is important when engaging in humanities education to begin with activities that support learners in making personal connections with the people and events of the past. This practice, which emerged as part of the teachers' implementation, offers insight into the design of humanities-focused PjBL in disadvantaged areas such as the one in this study. Asking students to imagine life in the past, through the events and people depicted in the photographs, sustained inquiry that created a space for students to talk and think about themselves. In turn, it supported teachers in modeling ways of challenging common and often disfavorable narratives about the community. In this way, the teachers in this study were able to realize the vision for humanities education as a form of educational reform. They were able to focus less on the deficits of their community and help students empathize with others and empower themselves by understanding how their lives in the present relate to the past (Levstik & Barton, 2011; Wineburg, 2001).

The current study also carries implications for the practice of instructional design. As designers engaging in a project that intersected with social justice issues, we recognized that we needed an approach that was sensitive to the power differentials that were likely to emerge throughout our work. We ultimately took a reflexive stance, which was essential in supporting our teachers as co-designers as part of our DBIR effort. It acknowledged the fact that our teachers came to us with their own ways of knowing, based on their own experiences in the community. Our own experience in this regard is consistent with other DBIR scholars who have emphasized the importance of a

mutual, trusting relationship with participants in any educational design effort (Gutiérrez & Jurow, 2016; Penuel et al., 2011).

Conclusion

The purpose of this paper was to share our experience with incorporating humanities education into the K12 curriculum. While the data supports the efficacy of our approach, our work offers insight into the intersection of learning design and contexts in which racial and economic inequities persist. In many ways, our reflexive process helped model the humanities approach we hoped to achieve; it centered on our relationship with our participants and the community, and how that relationship developed and grew over time. It is our hope that this paper serves as an example for others as they negotiate the complexities inherent in this type of work.

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CHAPTER 4

ACCOUNTABILITY IN LEARNING DESIGN AND RESEARCH AS AN ONGOING PRACTICE[4]

[4] Walters, K. and T.J. Kopcha. Accepted by Hokanson, B, Exter, M., Schmidt, M., & Tawfik, A. (Eds.). *Toward Inclusive Learning Design: Social Justice, Equity, and Community.* Springer.

Abstract

Learning design happens in collaboration with people. Our accountability to those people is nurtured through an understanding of the relationship between those people and the contexts they inhabit, as well as our own positions in the world. Negotiating those relationships can be complex, demanding sensitivity, understanding, and transparency on the part of the designer. This chapter offers an introduction to the constructs at play when designers place accountability at the forefront of their work.

Keywords: Accountability, positionality, intersectionality, critical consciousness, reflection, dialogic communication, perspective taking, learning design

This chapter introduces the various constructs at play when learning designers place accountability at the forefront of their work. Because learning design happens in collaboration with other people, we are (or ought to be) accountable to those people. Accountability in the context of learning, design, and technology (LDT) refers to a practice in which designers acknowledge the ways socio-cultural-historical contexts position people differently and affect the way dynamics such as power and responsibility emerge from this positioning. It also refers to the way designers consider their own perspectives so they may take action as they negotiate the positions and dynamics present in a given context. With current calls for social justice reverberating in both the streets and the classroom (e.g., MacDonald, 2021; Westerman, 2020), the need for accountability in LDT is perhaps greater than ever before.

As practitioners and scholars, however, it is often difficult to begin a conversation about accountability from an academic perspective. Accountability is a complex integration of several foundational theories and philosophies associated with ways of knowing ourselves and others in the world, including: socio-cultural-historical considerations, positionality theory, intersectionality theory, and critical consciousness. The purpose of this chapter is to introduce these constructs and detail their interrelationships so other designers and researchers can practice accountability in their work.

Accountability in Learning, Design, and Technology

Accountability is possible when we are "functionally and/or morally responsible" for an action (Bivins, 2006, p. 21). Being functionally responsible is typically more straightforward than being morally or ethically accountable. Functional responsibility is

clearly stated, such as the role of a Primary Investigator on a grant-funded project or contract. In such cases, accountability is reflected through a legal or professional obligation to fulfill the requirements of the project or contract-- in other words, there is a "*liability* for ensuring a task is satisfactorily done" (McGrath & Whitty, 2018, p. 698, emphasis added). This is the form of accountability many instructional designers and researchers think about as they engage in field work.

Moral responsibility is less straightforward. To be morally responsible for an action requires one to complete an action at a level that meets the needs and/or approval of others. This goes beyond a legal function of responsibility and addresses the ways policies and project goals are situated in, and potentially in conflict with, social and cultural norms and practices. From this perspective, one's responsibility is often multiple, unclear, and complex. It requires one to consider the ways learning design and research occurs with and through people who are situated within larger socio-cultural-historical contexts (Yamagata-Lynch, 2010). Social structures and norms influence how we are perceived by others and how we *think* we are perceived; both influence decisions we make and the consequences of our decisions. Thus, accountability in learning design and research is more than the completion of project deliverables. Accountability requires an understanding of the roles we play, how those roles interact with others, the social and cultural norms that affect those roles, and the ways equitable relationships may be fostered within a given context.

Negotiating Accountability in Learning Design and Research

There are several foundational constructs associated with practicing accountability and understanding the ways equitable relationships may be fostered within

a given context. Figure 4.1 displays the various constructs and their interactions (e.g., positionality, intersectionality); those constructs are explained more fully below.

Social-cultural-historical Context

Central to Figure 4.1 is a dotted sphere that appears within a socio-cultural-historical context. The positioning of the dotted sphere refers to the fact that anything we do, including learning design and research, is situated within a context. One level of context concerns the immediate environment, e.g., classroom furniture, temperature, and teacher support (Tessmer & Richey, 1997). This is often the focus of our instructional design models and initial environmental analysis (e.g., Dick, Carey, & Carey, 2009; Morrison, Ross, & Kemp, 2019).

The socio-cultural-historical context represents the ways social and cultural norms, and their historical associations, shape our meaning-making and actions in the present (e.g., Rogoff, 2003; Vygotsky, 1978). Socio-cultural-historical contexts shape the way we develop, such as how we learn language, as well as the references and resources we use to communicate (e.g., the color red means stop). Projects often exist within multiple contexts shaping the ways we and others make sense of our interactions.

Intersection between Oneself and Others

The dotted sphere in Figure 4.1 connects the entities of *self* and *others.* The dotted line with arrows represents the ongoing interaction between oneself and others within a context. It is through this interaction we, as designers and researchers, develop an understanding of who we are and how we might un/intentionally affect others. In any project we assume a role, and often multiple roles. We might be a lead or co-designer, a subject matter expert, and/or a researcher or participant observer. Those roles frame our

expectations for a project, what we expect from others, and what others might expect from us. This represents the beginning of the practice of accountability -- one must be able to identify the roles we play within a context and how those roles relate with the people we interact with (i.e., others).

Positionality, Intersectionality, and Critical Consciousness

The inner circles in Figure 4.1 represent constructs related to the interactions between self and others in a context: positionality, intersectionality, and critical consciousness. As noted above, anytime we interact with others, we are positioned and position others in roles with certain responsibilities and expectations. Positionality theory posits the way we are socially positioned impacts the way we experience and make sense of the world (Haraway, 1988). The position we occupy determines whether we experience opportunities to access power and resources or whether we are denied this access. These experiences of privilege and oppression provide different experiential knowledge about the workings of social, political, and economic systems (Haraway, 1988). Positionality is about who we are and how we make sense of the world, situated in who we are in relation to others and the larger context.

Intersectionality theory proposes we hold multiple, interrelated social identities such as gender identity, race, ethnicity, and dis/ability. Intersectionality attends to the ways the experiences and expectations stemming from these identities intersect in unique and complex ways (Crenshaw, 1989). Some identities may be more or less salient in a given context, and sometimes the expectations and experiences afforded by our identities are in conflict. For example, I experience gendered oppression as a woman but racial privilege as a white person. Black feminists theorized these multiple experiences of

oppression and/or privilege were not simply the sum of their parts (Combahee Collection, 1983). In other words, I do not experience the world first as a white person and then as a woman; I live an interdependent existence. This interdependent existence is the result of dynamic, ongoing, interactions between self, others, and context. Thus, at the heart of intersectionality is a focus on understanding how the differences between self and others are re/produced and experienced in response to the context.

Critical consciousness is an understanding of the way power dynamics structure our social systems, and the impact this has on our individual lived experiences. It is the ability to identify the way socio-political systems frame our values, practices, and interactions and how, through this framing, these systems promote marginalization and inequity (Freire, 1998/1973; Goulet, 1998). Freire (1998/1973) described critical consciousness as recognizing how the experiences of oppression, such as low income or poor housing, are not the result of individual failures but rather are rooted in social systems. Critical consciousness is therefore a way to make sense of who we are and who we are to others situated within the various power dynamics relevant to our lived experiences.

Practicing Accountability

At its core, learning design relies heavily on understanding the experiences of others -- both in identifying the needs they have and their experience with the learning materials we develop (Stefaniak, 2021). To be accountable, then, a learning designer must understand the interaction between how we know the world, personally, and how others know and experience the world. The constructs above provide ways to understand and situate these interactions as a guide for the practice of accountability. Below we

describe three specific practices that are rooted in those constructs: Self-reflection, Critical perspective taking, and Dialogic Communication.

Self-reflection

Self-reflection involves examining both one's beliefs and actions, and the relationship between the two (Finlay, 2008). Using the construct of positionality, one can reflect on how they are positioning others and what expectations they have based on this positioning. Questions that promote self-reflection tend to focus on making project roles and expectations clear: Are my expectations of others (i.e., positioning of others) in-line with project roles, and/or are they problematic for others? Are these expectations being openly discussed, and, if not, how might I create space for this discussion?

Positionality also provides an opportunity to consider how others are positioning you. How might your actions be perceived? What expectations do others have for your actions? How well are you fulfilling these expectations? Might there be hidden expectations, and how might you uncover these? These questions seek to bring the expectations of others to the forefront of a project to promote clear communication and productive interaction between oneself and others.

Critical Perspective Taking

Critical perspective taking is the practice of continually reflecting on potential issues of power in a given context. This requires an understanding of the socio-cultural-historical context of a project, especially in terms of power dynamics, social identities, and the re/production of inequity. This understanding, rooted in the notion of critical consciousness, can then be used to situate critical perspective taking. For example, a lead designer on a project who is also the Principal Investigator on the grant funding the

project may carry a perspective that they are 'in charge' of decision making. If that person is also a white male, his perspective might contradict or even conflict with the perspectives of team members who come from a different racial and/or gender perspective. This power dynamic, if left unchecked or unresolved, might affect how willing the team members are to contribute to the project and, ultimately, whether the project succeeds.

Thus, critical perspective taking requires considering one's positionality and intersecting social identities, and the way those identities relate to other stakeholders in the project. Questions that promote critical perspective taking focus on one's position and the power dynamics associated with that position: What are your own beliefs and values, where do they come from, and how do they impact your actions and decisions in this project? How would other team members answer these questions? How much autonomy do you believe your project members have, and how do those levels of autonomy serve or potentially harm the project?

Another aspect of critical perspective taking focuses on the re/production of oppression and privilege in a given context. There are perspectives and practices that our field takes as natural or neutral when, in fact, those perspectives are rooted in and reflect a white, male, able-bodied perspective. Critical perspective taking instead assumes *all* perspectives are situated. The goal of critical perspective taking is to monitor for and identify key perspectives that might be missing from a project as well as determine what perspectives need to be centered as a project unfolds. An example of this can be seen in the context of educational reform in underrepresented populations. Such reform efforts often focus on white neo-liberal views of success (e.g., achievement on high-stakes

testing, percent of graduates in four-year colleges) that do not account for the values of the community in which the reform is taking place (Lavalley, 2018). Scholars have repeatedly noted how such perspectives fail to address the socio-cultural-historical roots of oppression in a way that negatively affects educational outcomes in those communities (Lavalley, 2018; Schafft, 2016).

Dialogic Communication

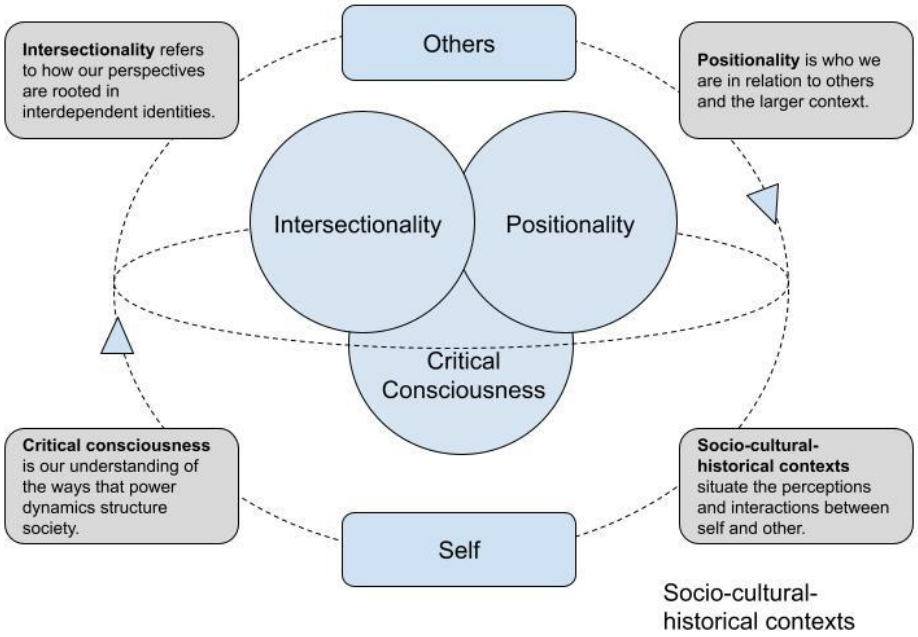
Dialogic communication is a tool for producing new understandings across individuals' various perspectives and goals. Kinlock and San Pedro (2014) describe the engagement of this practice as a dialogic spiral through which we make connections by listening and revealing vulnerabilities. The purpose of the dialogue is not to raise one voice over another, or to prove one perspective right or wrong, but to produce a new, co-constructed perspective. This requires coming to the conversation with an understanding of one's positionality and intersecting identities, and the ways these interact with others' roles and identities. Acknowledging the validity of each person's perspective, while also understanding them as situated and not "Truth," allows for the building of rapport, trust, and acceptance.

It is important to engage in critical perspective taking to ensure the ways this action is practiced does not tend towards centering dominant perspectives. Through dialogic communication we can develop understandings of multiple perspectives in a project. These understandings help us answer important questions such as: How can we manage the differing goals and perspectives among a project team? What do we do when these goals and perspectives are in conflict? Who does our project affect directly or indirectly, how might it negatively affect them, and are we in regular communication

with them about our work? Dialogic communication also helps us understand important issues of power related to the project when we listen to our participants as they communicate about their roles, identities, and perspectives related to their authority and vulnerability within the workplace or context of the project.

Figure 4.1

Negotiating Accountability In Learning Design



Accountability in Practice: An Example

Over the past 6 years, the authors have engaged in learning design and research in a rural community in the Southeastern United States. Like many rural areas in the South, the history of the community spans from the practice of slavery in the 1800's through the Civil War, Jim Crow, and the Civil Rights movement. With funding from a national

grant, we worked alongside teachers, community members, and administrators to develop a curriculum that engaged K-12 students in humanities-focused, project-based lessons centered on their community. The larger goal was to support students in connecting their experiences in the present with the racial and economic inequality that has persisted in the community over time. This often required broaching difficult topics such as such as slavery, segregation, and economic hardship (see Lawton et al., 2020).

As white scholars from non-rural communities, we had to hold ourselves accountable on multiple levels, taking time to understand how various perspectives could help shape the success of the project. Below we describe this process through the lens of a single moment experienced by and told from the perspective of the first author. The moment begins with a conversation with a 6th grade teacher who was implementing her project-based unit focused on engaging students in creating, sharing, and understanding the events of the past from multiple perspectives within the community.

A Critical Moment

> *"**I'm just tired of it always being about slavery.** History has taught us to focus on the negative. But kids are just kids. When you get them talking about themselves and what they like to do, they can think about the kids in the past that way too."*

When I heard what the teacher said, I knew immediately the "it" in her statement meant the project. In that moment, I realized I had not truly thought about the project from this teacher's perspective; I was limited by my own perspective, despite thinking otherwise. I often described the project as a way to provide students, about half of whom were African American, a central role in identifying, creating, and sharing previously untold stories from their community. From my perspective, the most important stories were those that recounted moments of inequity and oppression and the ways people

pushed back against those forces. The teacher's words were jarring. They made me realize I was prescribing what I thought these stories should be rather than letting the students and the community decide what was important to tell.

Thinking about it now, I know where my assumptions came from. As a former community organizer, I often focused on stories of inequity and injustice, and the lessons learned from fighting against these forces. Those stories helped motivate community members to get involved in making positive change. Yet I overlooked how the current context was very different from those I was used to working within. The purpose of the project was not to raise awareness about inequity in the community; this was not new information to the students, or their families. Instead, the project was about supporting students and community members to take control of the narrative(s) of their town. Although I intellectually understood this goal, this critical moment revealed my need for self-reflection as to whether I was being accountable to this goal, and to these students. This critical moment was not simply a correction of an incorrect perspective. A more meaningful interaction occurred as I quickly realized I needed to examine my assumptions in this context and, in turn, the impact of those assumptions on the design.

I needed to be accountable.

Unpacking the Model

To be accountable, I had to negotiate several complexities, displayed in Figure 4.2. For example, the teacher's statement most immediately indicated I needed to better understand *her* position. Through critical perspective taking, I came to see how her perspective was informed by her experience as a 6th grade teacher, in particular, her experiences as a black woman, raised and living in a rural county, working with students

with similar backgrounds. It was the Intersectionality of her identities that brought her to prioritize a narrative that was more than "being about slavery." She sought to provide space for her students to just be kids, to celebrate life's moments and be celebrated, protected, and seen. It was here I understood her desire to challenge the students' existing mindset around race and poverty and move beyond an overly simplistic and harmful oppression narrative.

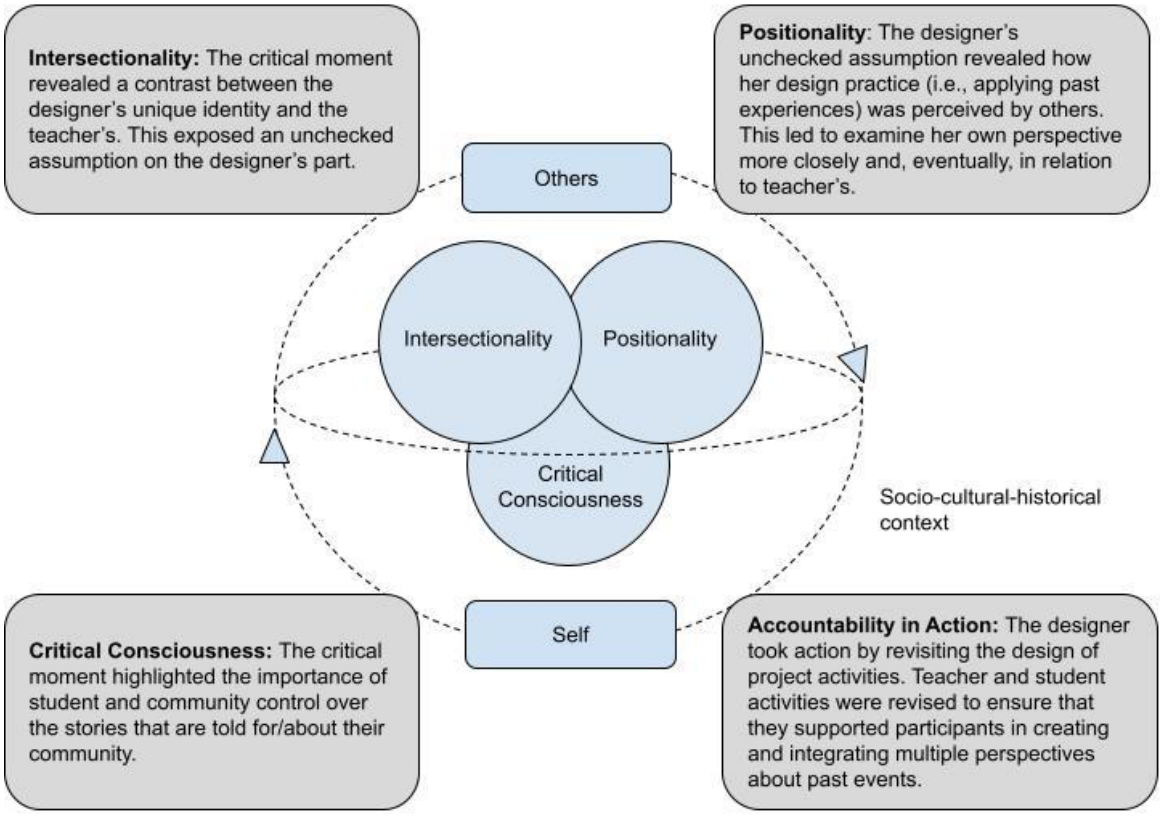
Next, I needed to understand my *own* position (Positionality). I had approached the project with the mindset of an organizer more so than an educator. Through self-reflection I identified the unchecked assumptions based on my previous experiences (e.g., what stories were important). It was through dialogic communication I realized how my assumptions were perceived by the teacher as problematic.

I then needed to understand how the teacher's position related to my own. The teacher's perspective focused on community members as whole and complex individuals situated within a particular socio-cultural-historical context. I came to understand how my position may have unintentionally supported a dominant narrative which, in the US, often centers oppression as the singular experience of African Americans. Through this Dialogic Communication between perspectives, my understanding of the importance of historically situating oppression and racial inequity shifted. I realized how a focus on stories of oppression might contribute to a problematic narrative, and how important *other* stories of people's lives could be in challenging that narrative. In line with critical consciousness, I also had to recognize these narratives have material consequences as they shape our perceptions and actions. The teacher was not suggesting glossing over oppression or ignore the material consequences of historic, systemic racial and economic

inequity; rather, she was suggesting how important it was to *also* see the people and events of the past as something more. Her position sought to challenge an ongoing focus on oppression, so stories of oppression were neither absent nor presented as the only stories that matter.

Figure 4.2

Unpacking accountability as a practice



This new understanding led to changes to our design practice. The changes were not immediate or instantaneous -- they emerged slowly over the next few months as I reflected on this new, more critical perspective and how it might affect our project and

the people contributing to that project. For example, at the next professional development we centered the theme of community and the multiple narratives associated with that community. This supported teachers in designing activities that incorporated those themes and created opportunities for students to explore multiple perspectives of the past. We also revisited our initial commitment to our teachers, not as participants in a study but as co-designers in every sense of the word. With the construct of positionality in mind, we created a space to center the perspectives of the teachers. Through written feedback and ongoing conversations after the professional development, we continued to focus on the ways our teachers negotiated the complex socio-cultural-historical context surrounding the project. We reaffirmed our initial commitment to understanding our co-designers' positionality and intersectionality in relation to our own so we could better serve the community and students through our design practice.

Discussion

The chapter thus far has explained the constructs associated with accountability in LDT, the actions which support its practice, and situated both in a specific example. One potential misconception that might arise from this structure is that the act of being accountable is formulaic, like a recipe to be followed. In this section, we touch on three key ideas with the intent of dispelling any perception that accountability is straightforward. Our goal is to reify how accountability is a complex process that demands an attitude or mindset as much as a set of skills to be practiced, both of which lead to (or ought to lead to) action.

The first key idea is that the practice of accountability is ongoing. It is not a singular event taking place at a stage of design (e.g., needs assessment) but rather an

ongoing practice in which designers self-reflect on how their perspectives and roles intersect with and, at times, potentially conflict with those of others. It acknowledges our projects affect the context in which and people with whom we work -- and as they change, so must we. While being accountable may look different at different times, it embraces a core practice of acknowledging one's position in the world and continuously evaluating how that position may affect others, either directly or through our designs.

The ongoing nature of accountability leads to the second key idea, which is an acknowledgment of the ways accountability is professionally challenging. Instructional design models often support the notion that the designer is the neutral and objective expert. Accountability challenges that notion, taking the critical stance that you *can't* be truly neutral. Designers have socially constructed complex identities (Intersectionality) that come to bear on their interactions with others (Positionality) and the context (Socio-cultural-historical). Rather than fight or hide the effects of one's identity on design practice, accountability encourages *transparency* as a designer -- both in one's actions and the assumptions behind those actions (self-reflection). The challenge, then, is that transparency demands designers share their design thinking. It requires designers to be vulnerable and open about their practice, even when that practice is problematic (dialogic communication). Simply put, transparency means LDT, as a field, has to talk freely about what we do and how we hold ourselves accountable. While this is challenging, it will help add a new layer of validity and strength to our designs so accountability can become an inherent part of learning design and a cultural expectation in our field.

The previous key ideas lead to the third, which suggests accountability can be *personally* challenging. It requires designers to acknowledge, through critical perspective

taking and reflection, that each of us brings a set of assumptions to a project rooted in our positions in the world. The challenge stems from the fact that assumptions often go unchecked -- we take them for granted because they are part of who we are and how we make sense of the world. It is often not until our assumptions come into tension or conflict with another position we realize how they impact our design practice. Accountability suggests we have a responsibility to take action on these moments of tension while also engaging in continued reflection on how our identities and assumptions impact our design practice.

Conclusion

The practice of accountability requires us to consider how we perceive others, how others may perceive us in a given context, and the responsibilities associated with those perceptions. This chapter is an attempt to explain the complexities behind how those perceptions form and how we, as learning designers and researchers, can attend to the responsibilities arising from the various roles we play in the world. Negotiating accountability in learning design is not easy -- it requires self-reflection, critical perspectives, and ongoing communication with those we work with so we may come to make better sense of the world and our relationships with others. While there is no recipe that guarantees or ensures accountability will be upheld in learning design and research, the tools presented in this chapter offer both a starting point for those new to accountability and ideas for augmenting the way others already engage in accountability as a practice.

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CHAPTER 5

NEGOTIATING SOCIAL JUSTICE ISSUES IN RESEARCH AND PRACTICE IN THE FIELD OF LEARNING, DESIGN, AND TECHNOLOGY: A MULTIPLE CASE STUDY[5]

[5] Walters, K. and T.J. Kopcha. To be submitted to *Educational Technology Research and Development.*

Scholars and practitioners in the field of Learning, Design, and Technology (LDT) are increasingly facing tension around issues of social justice. One reason for this tension is that technology is often presented as being value-neutral, meaning that it provides "the most effective and efficient way of transmitting a given content" (Yeaman et al., 2001, p. 5). This value-neutral position contributes to a common perspective that educational technology is a panacea for that which ails education. Scholars (Bond et al., 2020; Xie et al., 2019) and organizations (USDOE, 2017; ISTE, 2022) frequently emphasize the potential of educational technology to increase student engagement, create more personalized learning, provide access to educational opportunities, and support data-driven decision-making. In relation to issues of diversity and equity, educational technology has been framed similarly as a "quick fix" for improving learning outcomes across socio-economic classes (Garcia & Lee, 2020, p. 247). The underlying idea is that educational technology is objectively good, and equally so for every student.

Many scholars, however, have argued this is not the case. Educational technology, like all technology, cannot be entirely value neutral. Because technology is both designed and implemented within a socio-cultural context, there are social and cultural norms and ways of knowing that are embedded into the design of the technology as well as in the decisions made around how it gets implemented (Thomas, Mitchell, & Joseph, 2002). It is often the case that dominant cultures and their assumptions, values, and ways of knowing are promoted through educational technology (Bradshaw, 2018a; Tracy & Boling, 2014). In the US, for example, this often means that white, western, individualistic, and techno-centric perspectives tend to guide the design and implementation of technology integration (Subramony, 2004).

The field of LDT has its own dominant culture and assumptions about research and practice involving educational technology (Campbell & Janes, 2020; Bradshaw, 2018b). Overall, this culture is characterized by a longstanding goal of studying and establishing principles and models of instruction that can be generalized across populations and contexts (Reiser, 2012). A number of noteworthy gains have come from this culture. For example, Mayer's experimental research on multimedia design has led to a robust collection of principles (e.g., Mayer & Moreno, 1998) that are largely acknowledged as foundational in our field (Richey, Klein, & Tracey, 2011). Merrill's First Principles of Instruction similarly reflect a comprehensive effort to establish through scientific study a generalizable set of foundational principles to guide instructional design (Merrill, 2007). The instructional design models in LDT also reflect this dominant culture. Models like those offered by Dick, Carey and Carey (2009) and Morrison, Ross, and Kemp (2019) attempt to provide a generalizable process for the design and development of instruction that can be used in a variety of contexts and situations. These and other efforts like them continue to inform research and practice in LDT.

Scholars in the field of LDT, however, have begun to question the dominant culture, particularly around issues of social justice. One driving factor is that improved access to technology, and, in particular, the ability to produce and create with technology, has the potential to support the emancipatory possibilities of education (Glazewski & Ertmer, 2020; Subramony, 2017). Emancipatory education, as described by Freire (1973/1998) and built upon by others (e.g., Grande, 2008; McLaren, 2002; Paris & Winn, 2013), goes beyond a focus on content knowledge towards an understanding of social, cultural, economic, and political systems, and the ways these systems impact our lived

experiences. The goal of emancipatory education is not only for learners to understand the ways experiences of oppression and privilege, i.e., inequity, are connected to and situated within socio-cultural systems, but also for learners to better understand the ways these systems operate in order to change these systems (Freire, 1973/1998). To realize the emancipatory potential of education and technology in LDT, then, scholars and practitioners alike must engage with what it means for technology to be socio-culturally situated.

Socio-cultural Perspectives in LDT

A socio-cultural perspective supports the emancipatory potential of education and technology in that it moves beyond seeing technology as or assuming technology is value neutral. Instead, a socio-cultural perspective encourages learning designers to explore the ways technological solutions impact their communities, and to learn how to leverage technology to support their own goals and needs in coordination with those who are impacted by their work (Garcia & Lee, 2020). This means moving the field away from our dominant culture (i.e., establishing generalizable principles) towards one in which learning designers critically evaluate *both* the potential good *and* harm their work might bring to a given situation. Realizing this new goal means moving beyond models towards research and practice that is centered around understanding how deeply contextual and longstanding issues like power, equity, and inclusion affect those we work with (Campbell & Janes, 2021).

There is a broader interest in LDT to move beyond the dominant culture and explore the role that learning design can play in solving social and educational problems. For example, the 5th edition of the *Handbook of Research in Educational*

Communications and Technology was completely restructured to center key problems in education and the ways they may be addressed by learning design and research (Elen & Bishop, 2020). Co-editors Elen and Bishop (2020) described this restructuring, stating, "the *Handbook* should better represent how the scholarship of our field is relevant for society…our hope was to reorganize this edition around those [educational and social] problems, instead of technology being the main focus" (p. 3). In this perspective, the socio-cultural contexts within which learning design and research take place become the focus, changing the way we approach technologies, models, strategies, and design practices. This moves beyond models in that it encourages learning designers to look at the types of actions, ideas, and values that their designs promote, the ways learners might interact with their designs, and the consequences -- both intended and unintended -- that these interactions may have, beyond the targeted learning outcomes.

Outside of the *Handbook,* a growing number of scholars have begun to focus on the role of the designer as "change agent" (Campbell, Schwier, & Kenny, 2009) and the ways a designer's ethics and values impact their designs (Gray & Boling, 2016). Rather than seeing a designer as an "impersonal technician" tasked with implementing the scientific process of instructional design, these scholars argue that both designers and the process of design are situated within particular historical, social, cultural, and political discourses and ways of knowing (Campbell & Janes, 2021, p. 237). Therefore, the designer not only engages in a complex process of weighing priorities and constraints, learning goals and strategies, technologies and media, but also engages in this complex process informed by their previous life experiences, personal and professional values, and ethics (Gray & Boling, 2016). The designer's positionality, i.e., a social construct that

describes who one is in relation to others, is as much a part of the design process as the chosen model or strategies. From this perspective, the practice of instructional design moves away from following a generalizable process that can be replicated across contexts towards a contextualized, personalized experience that requires ongoing attention to oneself, and one's impact on those around us.

Despite the interest in using learning design to address issues of social justice in the field, there is little guidance on *how* to engage in research and practice in LDT in a way that is socio-culturally situated. Models and generalized principles of design (e.g., Dick, Carey, & Carey, 2009; Merrill, 2007) more often focus on what the designer should do in terms of what tasks they need to accomplish *from an instructional perspective*. This typically focuses on writing behavioral objectives, aligning those objectives with an assessment, and selecting strategies and technologies that support achieving those objectives. While most models promote some form of needs assessment, the emphasis is on determining how best to achieve an objective in a given context rather than understanding the socio-culturally situated aspects of learning that are often present in today's educational contexts. Simply put, there is little guidance around *how* a designer should approach learning and learning design as a socially- and culturally-situated act. By *how* I mean both the attitude and habitus -- i.e., the internalized experiences, beliefs, and values (MacLeod, 1995, as cited in Subramony, 2014) -- a designer uses to inform their perceptions and decision-making throughout a design project.

The guidance that does exist on how to practice learning design as a socio-culturally situated activity often focuses on the role of cultural factors on learning and learning design (e.g., Benson, Joseph, & Moore, 2017). Perhaps one of the most

noteworthy instructional design frameworks with a cultural focus in the field of LDT is Patricia Young's (2008a; 2009) Culturally-Based Model. Using critical discourse analysis on historical instructional materials designed by and for African Americans, Young (2008a) derived 70 design factors related to the ways culture was embedded in these materials. The design factors specify how a designer should attend to culture in each of eight areas: inquiry, development, team, assessments, brainstorming, learners, elements, and training. For example, the first factor under development is to "consider the technical, aesthetic, content, culture-based, and target audience design specifications" (Young, 2008a, p. 113). To implement this design factor, a designer should explicitly attend to cultural perspectives and the ways these may impact learning design.

While there are scholars like Young who strongly advocate for socio-culturally situated approaches to learning design (e.g., Campbell, Schwier, & Kenny, 2009; 2021; Gray & Boling, 2016; Sulecio de Alvarez & Dickson-Deane, 2018), there is still a notable lack of understanding of the practices that encompass such an approach. There is a growing interest among scholars in the field to better understand what is actually happening around *how* to implement socio-culturally situated perspectives during a design project. For example, take the CBM's design factor of "consider the … culture-based… design specifications" -- the way this advice can play out in practice is drastically different across designers. The way it plays out depends on the designer's positionality and understanding, the positions and perspectives of people they serve, and the contextual factors surrounding the project. From this perspective, a number of questions about learning design remain, such as: how might a designer negotiate the tension between their own ways of knowing and those of the target audience and other

stakeholders? How do those decisions impact the overall learning design? And how might those decisions impact or raise issues of equity and power, both within and beyond the project, for those involved? Those questions and their answers go beyond the models and generalizable principles that currently dominate the culture of our field.

Therefore, it is understandable that despite some attention to the socio-culturally situated aspects of learning and the ways these impact our research and practice, scholars remain critical of the field as a whole for ignoring or overlooking these issues, and the ways they connect with equity and justice. For example, Bradshaw (2018b) stated that LDT has a "social justice blind spot" that stems from a lack of "critical attention" to the social, cultural, and historical contexts within which our field evolved and continues to evolve (p. 336). Campbell and James (2021) situated this blind spot in the context of what they call the "master narrative of instructional design;" a narrative that embraces a techno-centric, western-centric, systemic view of design. Bradshaw (2018b) similarly explained that the work of LDT scholars is not seen as related to the social, cultural, or historical contexts it was created in, therefore promoting an idea of the work as timeless, i.e., context-less, or simply a neutral and positive contribution. Unfortunately, this context-less perspective, Bradshaw (2018b) argued, results in LDT practitioners and scholars engaging in work that does not attend to systemic injustices, and that may even contribute to these injustices.

Campbell and Janes (2021) described how countering this perspective requires that learning designers (re)focus on values and the uncertainty involved in learning design. Both a focus on values and an embracing of uncertainty are related to viewing instructional design as a "socially situated practice" (p. 237). Refocusing on values refers

to acknowledging and attending to the underlying values guiding the work of the designer, as well as the way a learner engages with a design. These values are developed through previous experiences and backgrounds, situated within particular socio-cultural contexts. Uncertainty comes from the fact that learning design is not a linear, prescriptive process, but rather one rooted in socio-cultural contexts. Every stakeholder -- designer, instructor, student -- involved in learning design has the potential to introduce uncertainty. For example, learners often do not engage with designs the way they were intended. Attending to values and uncertainty by considering socio-cultural factors brings constructs into the practice of learning design that are not often present in our models.

Ethical, Cultural, and Critical Perspectives in LDT

Although there is not much literature in LDT that specifically attends to negotiating social justice issues in our design and practice, there are research areas that closely align with these issues. These fall largely into three general perspectives or considerations -- ethical, cultural, and critical. Scholars who focus on ethical considerations explore the role of the designer in learning design; for example, by examining the way that a designer positions themselves in relation to others, as well as how they take up specific ethical issues in their work such as access, inclusion, and privacy (e.g., Boling & Gray, 2015; Damarin, 1994; Moore & Ellsworth, 2014). Overall, these scholars focus on the ways that learning designers fulfill their social responsibilities, i.e., the ways they are attentive and responsive to the needs of those they serve through their work.

Scholars who focus on cultural perspectives address the culturally-situated nature of learning and design, and what this means for research and practice. A major focus in

this work concerns integrating learners' cultural ways of knowing into designs, i.e., on creating culturally-responsive and relevant learning designs (Benson, Joseph, & Moore, 2017). For example, Patricia Young (2008b) detailed two design specifications related to learners' cultures: cultural variation and cultural research. Cultural variation is the need to adapt designs to meet learners' needs, learning tasks, and personal characteristics (Young, 2008b). Cultural research involves describing the target audience "in terms of learning strategies and contexts for learning" (Young, 2008b, p. 12). Both specifications allow for cultural experiences and ideologies relevant and familiar to the target audience to be included in the design. In addition, several instructional design models attend to the role of the designer's own cultural knowledge, and the ways this impacts the design process. Cultural considerations impact the ways cross-cultural design teams work together and how designs may be adapted for use in other cultural contexts (Asino, Giacumo, & Chen, 2017). Moreover, cultural considerations require designers to engage in reflection on their own cultural values, and what it means to be culturally competent.

In general, critical perspectives examine the ways social, cultural, political, and economic systems construct inequities and the ways these inequities are experienced differently by differently positioned people (e.g., Freire, 1973/1998; Giroux, 1986). Critical perspectives on learning design deconstruct the ways underlying assumptions and values situate learning design research and practice to reveal what is often taken for granted (Nichols & Allen-Brown, 2001). Ultimately, the goal is to use these understandings to make change. LDT scholars have used critical theories to address the underlying narratives of the field itself, deconstructing the way these narratives impact both the process of design (e.g., Bradshaw 2018a; Campbell & Janes, 2021) and the

experiences of non-dominant, marginalized scholars (e.g., Campbell 2015; Romero-Hall at al., 2018; Romero-Hall, 2022). Additionally, scholars have explored how specific practices, e.g., critical pedagogies, may be integrated into the instructional design process to improve learning outcomes for all learners. Critical approaches reveal the impact of learning design, and therefore the importance of taking an equity-based approach to support all learners.

All three of these perspectives on learning design -- ethical, cultural, and critical -- overlap in their concern to address the "social justice blind spot" in the field, towards creating more equitable, inclusive, and meaningful learning designs. In this paper, I use the term 'learning design' rather than 'instructional design.' In line with Parchoma et al. (2020), I understand instructional design to refer to a more objectivist approach that centers measurable and tangible outcomes while learning design refers to a more subjectivist approach, understanding outcomes to be situated within dialogic and dynamic interactions. Therefore, 'learning design' better captures the efforts to align our professional practice as designers with the promotion of social justice.

Purpose

Issues of social justice, i.e., systemic issues of inequity, have been at the forefront of our national attention in the US and, not surprisingly, the field of LDT. While our longstanding models of instructional design may not explicitly attend to such issues, scholars in the field are engaged in projects that attend to and negotiate those issues in their research and practice. For example, the recently published special issue on Attending to Issues of Social Change Through Learning Design in the Journal of Applied Instructional Design (Kopcha, Asino, Giacumo, & Walters, 2021) showcased 14 articles

that explored the ways that issues of social justice can be addressed through learning design. There was also the 2021 AECT Summer Research Symposium, Toward Inclusive Learning Design: Social Justice, Equity, and Community; the research from that symposium is scheduled to appear in an edited book to come out at the end of this year (Hokanson et al., 2022). These efforts reflect how scholars in LDT are engaging in social justice issues, building on the ethical, cultural, and critical perspectives described earlier in this introduction to explicitly address the ways that issues of social justice emerge and may be attended to in their research and practice.

The purpose of this study is to build on the work that others in the field are engaged in to better understand the practices of the scholars who have negotiated issues of social justice in their research and practice. Using multiple case study methods (Stake, 2006), I looked across 5 LDT scholars whose work attended to issues of social justice. My ultimate goal was to identify the tensions they experienced while centering social justice in their work, the design practices they used, and the beliefs and design perspectives that informed these practices. I selected scholars that worked in a variety of contexts to understand the ways these practices are situated, i.e., the ways a designer's values and experiences interact with a particular context to produce design practices, and how these practices impact equity in learning design practice and research across contexts. The research questions guiding this study are,

1. What **tensions** emerge for scholars of LDT when negotiating issues of social justice as part of their work?

2. What learning **design practices and perspectives** (ethical, cultural, and critical) do scholars of LDT employ when negotiating issues of social justice as part of their work?
3. What is the **relationship** between those **tensions, practices and perspectives,** and the **contexts** when negotiating issues of social justice?

The results of this study serve to inform the field of LDT in several ways. First, the study focused on the practice of learning design and therefore provides a situated look at how scholars in the field attend to and negotiate issues of social justice. In line with other studies on design practice (e.g., Ertmer et al., 2008; Gray et al., 2015; Hoard et al., 2019; Nelson & Stolterman, 2003), this study looked at how designers made sense of particular contexts and used this understanding to guide their practice. However, what is different about this study is the specific focus on the negotiation of social justice issues, which addresses a growing concern in all educational fields to increase inclusion and equity through learning, improve access to technology, and examine the ways that our practices uphold, or work against, equity and inclusion. The study also adds new insight into a growing interest in the ways that LDT and socially-just practices intersect. This intersection adds a new dimension to what it means to be a designer in our field. By studying the practices that currently exist, this study not only offers strategies for negotiating social justice through learning design, but also reveals how scholars in our field are attending to and upholding a social responsibility to the people they serve.

Social Justice Issues in LDT: A Literature Review

Attending to issues of social justice in LDT requires an understanding of the ways social, cultural, and historical contexts impact learning and design. Below, I first address

what a socio-cultural and historically-situated perspective means for the practice of learning design and the role of designers. Then, I review three perspectives on learning design that relate to issues of social justice: ethical, cultural, and critical.

The Socio-Culturally Situated Design/er

Scholars in LDT who address social justice issues engage with many philosophies and theoretical positions; however, in general the underlying assumption of this body of literature is that learning design is relational, collaborative, and socio-culturally and historically-situated. The idea that learning design is relational and collaborative stems from the fact that, whether in K12, higher education, or industry, it involves communicating with others to better understand their goals and needs, as well as making efforts to understand the larger systems within which people interact, work, and learn (e.g., school districts, organizations/corporations, and broader cultural communities). Learning designers incorporate this contextual knowledge alongside their disciplinary knowledge, e.g., instructional theories and models and learning theories, to create meaningful and accessible learning activities and environments (Stefaniak, Luo, & Xu, 2021)

A socio-cultural perspective of learning posits that everything is embedded within the norms and values of the socio-cultural context in which it was created (Vygotsky, 1978). Social and cultural norms and practices frame the ways that humans make sense of the world, as well as how we communicate what we know with others (Kress, 2010). Stating that learning design is socio-culturally situated means acknowledging the myriad influences on the processes and products of learning design. This includes the goals, values, and previous experiences of the people involved, as well as their cultural,

institutional, and/or community norms and practices. In some cases, the influence of those factors is explicit -- a designer may intentionally center issues of race, culture, and equity as part of a learning design. In contrast, a designer might attempt to take a neutral stance as a way to avoid being culturally or situationally offensive. However, even with an attempt at a neutral stance the influence of context is apparent -- it can inadvertently imply that issues of equity are not problematic when they, in fact, are, or lead to designs that alienate learners and perpetuate a harmful narrative about the learner (Subramony 2004; 2017). For that reason, each design project is socio-culturally situated, involving a particular combination of stakeholders, contextual factors, cultural considerations, constraints, and goals/needs that require an approach that attends to those particularities as they emerge.

Learning designers aim to develop meaningful experiences to meet the learning needs and goals of their target audience. However, because of the way socio-cultural factors impact our lived experiences, meaning-making, communication, and learning, there is no single 'right' way to engage in learning design. Attending to socio-cultural factors in learning design requires a set of practices, implemented in context. Those practices span the gap between the designer's disciplinary perspectives, i.e., the selected design models and learning theories, and the context the design will be implemented within. Even when using a model designed with socio-cultural considerations in mind, a designer must figure out and establish practices that attend to the tensions that emerge -- tensions that are often rooted in issues of equity and diversity.

Design practices encompass what a designer actually does throughout the entirety of a design project, from start to finish, such as the selection/discontinuation of design

models, needs and learner assessments, usability testing, and summative and formative evaluation (Reiser, 2001). They also include working on design teams, collaborating with subject matter experts, and other interpersonal practices (van Leusen, Ottenbreit-Lefwich, & Brush, 2016). The way designers engage in these practices "reflect [their] values and belief structures, understandings, prior experiences, and construction of new knowledge through social interaction and negotiation" (Campbell, Schwier, & Kenny, 2004, p. 246). In other words, designers bring their values and understandings into their design practices; it is through interaction with others -- e.g., students, SMEs, other design team members -- that they construct new understandings that then also impact their practices. Both socio-cultural factors and the relational nature of design ensure design practices are situated within designers' ways of knowing, whether they explicitly attend to these or not.

If designers make decisions based within their socio-cultural values and understanding, then it is critical for designers to identify these values and beliefs and the ways they impact their research and practice. As well, a socio-cultural perspective on design requires designers to understand their learners' and other stakeholders' cultural norms and practices and the impact on learning needs and outcomes. Therefore, a designer is responsible for far more than implementing particular design models or principles. The role of the designer is complex, situated, and relational -- and includes space for designers to consider issues of equity, inclusion, and diversity. Designers can choose to align their values and understanding with emancipatory perspectives on learning and design and create and implement design practices to support these perspectives in their research and practice. Currently, designers looking for guidance on

how to do this work may pull from research that looks at learning design from ethical, cultural, and critical perspectives.

Perspectives Guiding Learning Design Practice: Ethical, Cultural, Critical

Overall, the field of LDT has approached the issue of social justice through three distinct perspectives: ethical, cultural and critical. Below I review the literature on each of those perspectives and their relationship with learning design practice and research.

Ethical Considerations

Ethics are the "systematic expression of rules or normative commitments" (Gray & Boling, 2016, p. 973) based on a professional or social role. The professional organization for learning designers and scholars, AECT, created a code of ethics centering on three commitments: to the individual, to society, and to the profession. In general, AECT's code of ethics sets a baseline for expected behaviors and attitudes when engaging in learning design and other associated activities. Underlying these commitments is the assumption that experts in the field of LDT have a responsibility to others -- a responsibility to individuals to support their privacy, learning goals, and diverse perspectives, and to society to contribute expertise towards solving social issues. This responsibility is evident in the principles associated with each commitment. For example, under commitment to the individual, the second principle states, "Shall protect the individual rights of access to materials of varying points of view" (AECT, 2018). This principle emphasizes the relationship between the expertise the field has to offer and individual and social needs associated with that relationship.

An ethical perspective acknowledges how learning design is a social act that involves making judgements about what learners need and how to best design

experiences that meet this need. Moore and Elsworth (2014) explained that, "the very act of [learning] design itself is a manifestation of ethics" (p. 124). In other words, as designers work, they make judgments that enact their own values and commitments, i.e., their ethics. These judgements include the many decisions made by a designer and/or design team throughout a project including those around the 1) prioritization of constraints; (2) maintenance and buy-in of stakeholders; (3) cultural or site-specific adaptation; (4) inclusion and equality of access; (5) agency of the learner; and (6) design philosophy (Gray & Boling, 2016, p. 988). During these decisions, the designer's "rules or normative commitments," i.e., ethics, guide them, as well as their personal and professional values (Gray & Boling, 2016, p. 973). Values are rooted in previous experiences, cultural backgrounds, and ontological and epistemological standpoints -- and these may or may not be in line with those of the learner and other stakeholders. Ethical issues emerge as the learning designer's own culture, experiences, and assumptions interact with the design context, as well as the culture, experiences, and assumptions of the learner and other stakeholders -- whether ethics are systematically and explicitly attended to during these decisions or not.

The literature around ethics in LDT covers a range of topics related to the role of the designer including the ways a designer understands their relationship to society and ethics, i.e., their social responsibility (e.g., Moore, 2009), and the ways this responsibility may be enacted to address specific issues such as intellectual property, accessibility and universal design, the digital divide, security and privacy, and cross-cultural competence (Moore & Elsworth, 2014). Additionally, some scholars have explored how to prepare

the next generation of designers to enact an ethical and socially-responsible practice (e.g., Moore 2014; Yusop & Correia, 2012).

Below, I first address the social responsibility of designers, and then look at how scholars have taken up specific ethical issues related to this responsibility.

Social Responsibility in LDT. Stephanie Moore (2014) explained the relationship between ethics and design may be understood as (1) using design as a way to address social problems, or (2) the integration of ethics into the design process, including "design problems that are not social problems on their face" (Moore, 2014, p. 192). The second understanding implies that all design problems are social, and therefore ethical issues are embedded in all design problems. The positive side of this, Moore (2014) suggests, is that all learning design work has the potential for social impact. Therefore, learning designers should take on an ethic of social responsibility. Moore (2009) described an ethic of social responsibility as ensuring one's work adds a "measurable value to our shared society" (p. 84). For LDT, this ethic requires attending to the impact the practice of learning design has on society.

However, when Moore (2009) surveyed faculty in instructional design and educational technology programs she found overall these faculty did not report practicing a professional commitment to social impact. Rather, participants found the social issues listed on the survey (e.g., shelter, substance abuse, pollution, discrimination) as unrelated to their work in instructional design and educational technology (Moore, 2009). Changing from framing learning design as neutral or unrelated to social issues requires attending to "a layer of design considerations we may not normally confront," including the ways our designs and design choices impact the rest of the educational system,

participant's safety and access, as well as whether our designs are supporting or maintaining social inequalities (Moore, 2014, p. 201). Although the 2009 study by Moore occurred over a decade ago, several scholars indicate a continuing lack of attention towards issues of social responsibility and justice both in our scholarship and practice (e.g., Moore, 2014; Subramony, 2017), and in the ways we train and prepare the next generation of designers (e.g., Bradshaw, 2018b).

Farrah Yusop and Ana-Paula Correia (2012) developed the Civic-Minded Instructional Designer's (CMID) Framework for use in graduate education in LDT to address what they perceived as an over-focus on "training-for-the-job" in LDT graduate studies. Yusop and Correia (2012) argued that the focus on technical skills was not situated within the meaning and purpose of the profession of instructional design. In line with an ethic of social responsibility, Yusop and Correia (2012) describe the purpose of LDT as "empower[ing] people to mak[e] informed decisions" (p. 185). When implementing the CMID framework, Yusop and Corriea (2014) identified specific design practices students engaged in including, (1) targeting and delivering services to address community members' needs, (2) giving voices to community partners and members, (3) addressing the sustainability of the partnership, or "leaving something behind," and (4) acknowledging community partners as design partners. Challenges included making adjustments and building trustful relationships. Design practices associated with the CMID framework are similar to ethical characteristics of design identified by Moore (2014). Both address the importance of engaging in a participatory process involving stakeholders, and, related, the expansion of "desired results" to include systemic and social impacts alongside learning outcomes (Moore, 2014, p. 203). These design

practices provide concrete examples of an ethic of social responsibility in practice and begin to identify the support needed for learning designers to implement this ethic in their research and practice.

Ethical Issues Addressed in LDT. There are multiple ethical issues that emerge from the intersections of learning, design, and technology, particularly around the social issues of access, equity, and inclusion. However, much of the attention on these issues remains focused on compliance with legal requirements rather than a consideration of the outcome for the learner and society (Moore & Ellsworth, 2014; Moore, 2014). For example, accessibility concerns whether learners with disabilities are able to access a learning environment. Although accessibility (now) represents a legal requirement, Moore and Ellsworth (2014) argued an ethical, outcomes-based approach to the issue should consider the overall experience of the learner. Following this approach, a designer would ensure all learners are able to not only access, but participate in, main instructional strategies (Moore & Ellsworth, 2014). Universal Design for Learning (UDL) is a framework that supports such an approach in the area of accessibility. The UDL framework instructs educators to provide multiple means of expression, action, and engagement (Rose & Meyer, 2002). These multiple means allow students to learn the same or similar content, while also attending to their diverse needs and abilities within a single classroom (Rose et al., 2006). This is an example of an ethical approach to accessibility because UDL ensures not only that learners can access content, but that they are able to engage with the content in a way that supports meaningful learning.

Similarly, Subramony (2014) argued we need to go beyond issues of digital media access to truly address the social issue of the digital divide. In other words, the digital

divide is not only about whether a learner has access to a device, but whether they have the cultural capital and knowledge to engage with technology as a creator or producer (Subramony, 2014). Schools and other institutions tend to support the dominant culture, and therefore learners who have access to dominant cultural norms and practices are at an advantage -- simply put, their education is designed to align with their previous experiences and cultural knowledge. An ethical learning design practice needs to consider the ways cultural capital is embedded in design, and the design process, towards creating "culturally cognizant and responsive" designs (Subramony, 2014, p. 8). Such a practice reframes the role of the learning designer in addressing the digital divide from ensuring access to devices towards designing for creator-level technological competency through learning designs that support students' own cultural norms and practices.

Another area related to ethics in LDT is learning analytics. Learning analytics centers issues of privacy, surveillance, security, and assessment, and across all of these, issues of equity. Approaching learning analytics from a sociotechnical perspective, Selwyn (2019) argued current practices in education tend towards supporting the status quo in relation to vulnerable groups because data-driven systems tend to privilege those most represented in the database. Selwyn (2019) explained, "existing power differentials and unequal social relations" structure the design, development, and implementation of such systems (p. 13). Although issues of privacy and security are also central to the ethics around learning analytics, Selwyn (2019) argued the power dynamics involved in the production, management, and use of data is the larger issue. For example, Regan and Jesse (2019) explored the ways 'big data' may sort and track students in discriminatory ways, concluding ethical risks are embedded in the ways these systems are designed and

implemented. Some ways scholars suggest attending to equity and ethical issues in learning analytics is through providing students ownership of their data, advocating for increasing oversight of commercial providers, and, perhaps most importantly, engaging in outreach to increase public understanding around the issues involved (Selwyn, 2019; Regan & Jesse, 2019).

In reviewing the literature on ethics and LDT, Moore and Ellsworth (2014) found cultural competency was one of the most commonly addressed issues. For instructional designers, cultural competency is the awareness of cultural differences and the impact these differences have on the process and product of design (Rogers, Graham, & Mayes, 2007). Designers must be able to attend to cultural differences when working on cross-cultural teams as well as when designing or adapting designs across cultures (Tracey & Boling, 2014). As well, designers should engage in reflective practice to identify their own cultural values and assumptions. Cultural considerations for design, including the cultural competency of designers, are addressed in the next section.

Cultural Considerations

There are many definitions of culture; Dickson-Deane, Bradshaw, and Asino (2018) argued for a broad understanding of this construct as "the basis for everything that makes one human" (p. 310). Along these lines, Scheel and Branch (1993) described culture as,

> "the patterns of behavior and thinking by which members of groups recognize and interact with one another. These patterns are shaped by a group's values, norms, traditions, beliefs, and artifacts. Culture is the manifestation of a group's adaptation to its environment, which includes other cultural groups and as such, is

> continually changing. Culture is interpreted very broadly here so as to encompass the patterns shaped by ethnicity, religion, socio-economic status, geography, profession, ideology, gender, and lifestyle. Individuals are members of more than one culture, and they embody a subset rather than the totality of cultures identifiable characteristics" (p. 7, as cited in Young, 2008b).

Culture frames the ways we make sense of ourselves and others, of our relationships, roles, and responsibilities, as well as how we learn and communicate. In education, culturally-relevant and culturally-responsive pedagogy focus on providing meaningful, authentic, learning experiences for diverse students by connecting students' out-of-school lives with course content (Ladson-Billings, 1995; see also indigenous and decolonizing pedagogies, e.g., Smith, Tuck, & Yang, 2019). Such approaches frame learning as a socially- and culturally-situated process. As described above, this means learners' cultures impact the ways they interact with and make sense of a learning design (Subramony, 2004). If learning designs do not support students, the students are not to blame for missed learning opportunities. Rather, we need to look at the materials and whether they are aligned with students' cultural knowledge. Therefore, considering learners' cultures during all phases of the design process is critical to ensuring a design is both appropriate and meaningful (Young & Asino, 2020).

Much of the literature on the intersections of culture, learning, and technology focus on the ways culture impacts students and their learning, and how to incorporate students' cultural ways of knowing into learning designs. The assumption is that if we understand the cultural knowledge students come into learning environments with, we can better design learning experiences that build off and make connections to this

knowledge. When successful, such culturally-relevant designs can promote motivation, engagement, and a sense of belonging. For example, Carol Lee (2003) connected the prior knowledge of speakers of African American English Vernacular (AAEV) to support literary interpretation strategies in the classroom. She found that making connections between students' cultural ways of knowing and classroom content improved motivation and engagement as well as supported social, civic, and political empowerment (Lee, 2003). Similarly, Hatley et al. (2017) used design-based research (DBR) to build a culturally responsive model for computational thinking (CT) and computer programming with African American middle school students. By integrating CT goals alongside storying and identity work, the design supported students' self-efficacy and sense of belonging in computer science (Hatley et al., 2017).

In addition to acknowledging the ways culture impacts learners, Asino, Giacumo, and Chen (2017) argued the learning designer requires "tools and strategies that enable the design of learning that is culturally aware" (p. 5876). In other words, it is not enough to make the argument/understand that culture impacts learning, we must build on this to create design models, practices, and principles that support designers in creating culturally responsive learning designs. Although research on culturally-responsive learning design is still not "mainstream" in the field of LDT (Subramony, 2004; 2017), there are several models which attend to the role of culture to produce initial designs or for the adaptation of designs for different cultures. These models, represented in Table 5.1, vary in their purpose and the ways they attend to cultural considerations. However, all the models implore the designer to identify the target audience or learners' culture and

ensure the final design product (e.g., materials, activities) aligns with the language, cultural norms and values of these learners.

Table 5.1

Cultural ID Models Attention to Culture and Role of Designer

Model	Purpose	Attention to Learners' Cultural Knowledge	Attention to Designers' Cultural Knowledge	Citation(s)
Multiple Cultures Model (MCM)*	Framework for e-Learning design	Presents cultural context as the scaffolding for the instructional design process and identifies 14 dimensions across which cultural context operates	N/A – focus is on learners/intended audience and materials	Henderson, 2007; 1996
Cultural Modeling Framework (CMF)*	General framework for design (any context)	Learners' cultural models are embedded into the learning design, e.g., norms of discourse and activity.	N/A – focus is on learners/intended audience and materials	Lee, 1997; 2003
Transcultural customization model (TCM)*	Adaptation of instructional materials	Includes a customization process within overall design process with 4 areas to align design with local culture	Cultural SMEs are recommended as design team members	Kim, 1999
Third dimension ADDIE model*	General framework for design (any context)	Through interaction, introspection, and intention the designer attends to their own and their target audience's cultural assumptions and values.	Interaction, introspection, and intention attend to the designer's own values and assumptions.	Thomas et al., 2002

AMOBEA design framework***	Design framework for online education	Identifies language, format, communication channel, activities, and methods as areas to adapt for cultural relevance	Instructors/designers cooperate with students to design courses, become “co-learners”	Gunawardena, Wilson, & Nolla, 2003
Cultural adaptation process (CAP)**	Adaptation of instructional materials	Identifies 5 critical and 3 assistive cross-cultural dimensions of learners and course materials (design)	NA – focus is on learners/intended audience and materials	Edmondson, 2007
Cultural Based Model (CBM)	General framework for design (any context)	70 design factors specific to culture are organized under 8 areas relating to project design and management	Area of team includes 3 cultural design factors: recruit cultural expert, recruit SMEs and/or educators with experience teaching target audience, and include a culturally informed team	Young, 2008a; 2009

* As identified in Young, 2008a
** identified in both Young, 2008a and Asino, Giacumo, & Chen, 2017
*** identified in Asino, Giacumo, & Chen, 2017

As shown in Table 5.1, some cultural instructional design models were developed specifically to design online material, others to adapt pre-existing designs, and others as general design frameworks. As described above, one of the most well-known and detailed models is Young’s (2008a) Culture-Based Model (CBM). The CBM focuses on the entire design process, from who to include on the design team to how to develop the design based on the “technical, aesthetic, content, culture-based, and target audience (TACCT) design specifications" (p. 111). Similarly, the TCM focuses on how to adapt an existing design by embedding cultural understanding into the entire design process, identifying areas where cultural differences are likely to make an impact (Kim, 1999). On the other

hand, the CAP focuses more on the content of the design itself, identifying and aligning the cultural dimensions of learners and materials (Edmondson, 2007). And, likewise, the AMOBEA design framework identifies specific areas in the curricula, e.g., language, activities, and format, where learners' cultural dimensions may impact their engagement and learning (Gunawardena, Wilson, & Nolla, 2003).

In addition to outlining the work designers should do to attend to their learners' cultures and the ways culture may impact the interpretation of and engagement with a design, some models also address the role of the designer themselves (see Table 5.1 for details). One way to address the role of the designer is to consider the designer's cultural knowledge and the ways this can impact design decisions, and ultimately, the final design. Both Young's (2008a) and Kim's (1999) models address the role of cultural perspectives on the design team by suggesting the inclusion of a cultural expert (Young, 2008) or cultural SME (Kim, 1999). Henderson's (1996) MCM addressed the roles a designer's epistemology, pedagogical philosophy, underlying psychology, and goal orientation have on their designs, as well as their understanding of the importance and relevance of cultural factors in learning. The most explicit attention to the role of the designer is present in Thomas, Mitchell, and Joseph's (2002) third dimension of ADDIE model. Thomas et al. (2002) suggested placing the framework of ADDIE in a sphere within 3 cycling elements: interaction, introspection, and intention. Each of these elements addresses aspects of the designer or design team. Intention refers to the overall design goal. The authors suggested moving from an intention to create culturally neutral designs towards an intention to create culturally appropriate designs; to make this move, designers must reckon with their own ideas and assumptions about teaching and learning.

Interaction refers to the need to ensure each stakeholder is contributing to the design. Introspection is a reflective process engaged in by the designer to identify their own cultures as well as their thoughts and feelings about the cultures of others they are designing with and for.

The differing foci in the models may also reflect differing perspectives on what aspects of culture matter for learning, and how these are/are not attended to during a more traditional approach to design. For example, Lyn Henderson (1996; 2007) developed the Multiple Cultures Model (MCM) in response to what she perceived as superficial, token, or stereotypical ways of addressing culture in instructional designs. In response, the MCM focuses on defining what exactly is the construct of "culture," and why it is important. Henderson (2007) identified cultural logics as ways of thinking and knowing that align with a cultural group and argued there are multiple cultural logics at play in any learning context. In other words, taking a cultural approach to learning design does not mean centering a single culture, but rather, centering,

> "a coherent interplay among various cultural logics: global academia or training cultures; the majority societal epistemologies of the e-learners and those of indigenous and ethnic minorities; issues of gender, class, religion, age, kinship, politics, and various workplace cultures; and pedagogies. Instructional design aims for a coherent partnership among these in the e-learning and e-teaching context, whether it is local, national, or global" (p. 136).

This "coherent partnership" can be implemented by explicitly discussing ways dominant and non-dominant cultures inform learning outcomes and assessment (Henderson, 2007).

The MCM, then, addresses cultural considerations by allowing for multiple cultural perspectives to co-exist.

Whether attending to curricula-specific cultural considerations, putting together a culturally-responsible design team, or engaging in reflection on one's own cultural perspectives, creating culturally-responsive designs requires more than following steps in a model. As Patricia Young (2008b) explained, "The designer must engender culturally sensitive qualities to engage culture- based design" (p. 14). The question becomes, then, how does a designer become culturally sensitive. Thomas et al.'s (2002) extension of ADDIE to include introspection, interaction, and intention emphasizes the importance of self-reflection in culturally-responsive design. In fact, numerous scholars have attended to the role of reflection in instructional design (e.g., Ertmer & Cennamo, 1995; Tracey & Hutchinson, 2013; Tracey et al., 2014; Wills, 2000), although not many explicitly attend to the ways reflecting on one's cultural norms and values impacts design decisions and practices. Glazewski and Ertmer (2020) described how, through critical reflection, designers may adopt an "ethos of intentionality," an active role that centers students' cultural identities. An ethos of intentionality is an asset-based view of students' cultural identities that embraces cultural ways of knowing and being as valid and valuable. Without this intentionality, it is possible to create learning designs inappropriate for the learners or the context (Glazewski & Ertmer, 2020). In particular, learners whose ways of knowing do not align with those of the designers and/or the design team may become alienated from the learning experience (Subramony, 2004).

Critical Perspectives

Critical theories "seek to reveal… contradictions, social inequalities, and dominances" to reveal the ways power dynamics and social structures impact people's lived experiences (Nichols & Allen-Brown, 2001, p. 226). By understanding the ways social structures, ideologies, and power are re/produced and the material realities they create, i.e., experiences of privilege and oppression, we move away from understanding such experiences as personal success and failure and towards a deeper understanding of the systemic roots of our experiences. For example, in education, critical research revealed an alignment between disproportionately higher disciplinary rates for black children and rates of racial bias in counties in the US (Riddle & Sinclair, 2019). In other words, black children were more likely to encounter disciplinary action in counties where racial bias was highest. There are many types of critical theories, e.g., critical race theory, feminist theories, and postcolonial theories, but all situate perception and action, i.e., meaning making and behavior, within social, cultural, and historical contexts. It is within these contexts social structures and power dynamics are re/produced, and meaning is subscribed to our everyday norms and practices. However, the purpose of critical theories is not only to critique the status quo and reveal the ways power is structured, but also to take action towards change (Freire, 1973/1998). In education, critical theorists focus on changing policies, structures, and practices that create or perpetuate inequities, to support the emancipatory potential of education.

In LDT literature, critical perspectives are brought to bear on the field itself as well as on the practices and purposes of research and design. In particular, LDT scholars have examined the ways dominant narratives structure our approaches to design and the

experiences of both learners and designers (Bradshaw, 2018a; Campbell & Janes, 2021), the ways socially-constructed identities impact learners and designers (e.g., Romero-Hall, 2022; Subramony, 2018), and how specific practices such as critical pedagogy can promote equity in and beyond the classroom (e.g., Horton, Byker, & Heggart, 2017; Bradshaw, 2017; Green & Chewning, 2020). Underlying the critical approach is a belief in the potential emancipatory power of learning environments and, therefore, the importance and responsibility of equity-based learning design.

Narratives are political and cultural resources we use to make sense of the world and ourselves by creating contextualized versions of reality (Bruner, 1991). Scholars have described many types and uses of narratives, including metanarrative, i.e., a story about stories (Raveendran & Srivastava, 2018), dominant or master narratives, i.e., collections of stories that promote shared understanding (Campbell & Janes, 2021), and explicit and implicit narratives, i.e., stories that communicate expectations and values in/directly (Bradshaw, 2018a). What these narrative types have in common is their power -- in structuring discourse, identifying values, and creating shared understanding, narratives indicate what is normal or othered, what is acceptable and not (Campbell & Janes, 2021). For example, narratives in particular academic fields may indicate what type of research is/is not relevant and worthwhile. Deepak Subramony highlighted multiple areas of research missing from the field of LDT including cultural diversity (2004; 2017) and the LGBTQI community (2018). Similarly, Bradshaw (2018b) indicated a lack of discussion in the field on the roles of socio-cultural-historical contexts and social justice.

Campbell and Janes (2021) described the master narrative of LDT as portraying instructional design as "a scientific, process-based system of analysis, prescription, and specification" (p. 232). There is not much room in this techno-centric narrative for individual designers' perspectives or values, or concerns for ethics or justice. Bradshaw (2018a) described how implicit narratives in LDT related to diversity imply "that problems related to racism and equity are so insignificant that simply changing a story character's skin color should be sufficient to solve them" (p. 235). In other words, design practices tend to take up issues of diversity and equity in superficial ways, and these practices carry with them a perspective on diversity that is equally superficial. Despite the power of these master and implicit narratives, counterstories do exist, and are continually being created (Campbell & Janes, 2021). Counterstories are those that disrupt the master or implicit narrative. In LDT, counterstories can provide insight into the "creative, relational, and political process" of design by focusing on the ways designers actually engage in design and make sense of their process (Campbell & Janes, 2021, p. 238).

For example, DeLorme (2018) described a decolonizing approach to instructional design using the indigenous symbol of the star quilt. The approach is decolonizing because it was created specifically to "empower indigenous educators and learners" (p. 166). Her decolonizing model includes two critical pieces, a relational-reflexive approach and auto-ethnographic skills. Both approaches serve to situate learning design as a reciprocal process, where the designer's own perspectives and ways of knowing are present and accounted for. Similarly, scholars Campbell, Schwier, and Kenny (2004; 2009) found designers in higher education engaged in design as a critical reflexive practice. These designers expressed multiple types of agency, i.e., interpersonal,

professional, institutional, and societal, during their work. Although instructional designers in higher education do not have the ability to pick and choose projects that align with their values, Campbell, Schwier, and Kenny (2009) found designers who engaged in societal agency were able to reconcile conflicts by "engag[ing] the institution in the conversation" (p. 657). Designers were able to make their values known and, in some cases, these values became part of the learning design. Campbell et al. (2009) also found designers reflected on their work as a socially-situated practice, within which they had personal and moral obligations to others, including their learners.

Another situated way we make sense of ourselves and others is through our socially-constructed identities. For example, my identity as a white woman is not an objective identity, created by myself in a vacuum. I came to understand my white-ness and woman-ness in a particular social, cultural, and historical context, i.e., in relation to/with others. From this perspective, many if not all of our identities are socially-constructed because they do not exist without recognition, and meaning subscribed to this recognition, by others (Gee, 2000). Critical theorists look at these identities and the ways they shape our access to power and resources, as well as the ways they impact knowledge production. Constructs such as positionality and intersectionality describe the ways our multiple identities interact with social structures and produce differently lived experiences. LDT scholars have engaged with these constructs to describe the experiences of scholars and practitioners who experience marginalization based on their identities. For example, Romero-Hall (2021) described how her experiences as an Afro-Latinx woman made it "difficult to *see* myself in this male-dominated field" (p. 39). Romero-Hall (2021) detailed her use of intersectional feminism in her teaching and

research as a way to push back against the ways she experienced the field. Similarly, Romero-Hall et al. (2018) provided insight into the many ways women in academia, from various cultural backgrounds, experience inequalities. Again, intersectional feminism is used to make sense of these experiences, revealing the contradictory nature between what these scholars want to see, i.e., "a process-based, relational, inclusive, equitable, and transformative community," and the current state of the field (Romero-Hall et al., 2018, p. 23).

Critical theories have also been used to create pedagogical approaches that support students in developing their awareness of socio-cultural-historical contexts, the impact of social structures on experiences of privilege and oppression, i.e., critical consciousness, as well as important subject-area content. Critical pedagogies are based in the work of Paulo Freire, and include feminist (e.g., Shrewsbury, 1987), and indigenous and decolonizing pedagogies (e.g., Grande, 2008; Smith, Tuck, & Yang, 2018). Many culturally-based pedagogies may also be considered critical pedagogies, such as Gloria Ladson-Billings' (1995) culturally-relevant pedagogy (CRP). What makes these approaches 'critical' is the desire to move away from the "banking" or transmission style of education, towards transformative education (Freire, 1970/1993). In other words, these approaches reframe the purpose of education from memorizing facts and content towards learning how social and political structures work, and reimagining these structures in ways that promote equity and justice.

Several scholars in LDT have taken the underlying philosophy of critical pedagogy to create and implement specific strategies in their design and research. For example, Horton, Bykerm, and Heggart (2017) described how they implemented hip-hop

pedagogy in a seventh grade classroom in Australia. Hip-hop pedagogy is a critical, culturally-based approach that centers students' out-of-school knowledge and lived experiences alongside the hip-hop culture of resistance, a focus on race, racism and social differences, and action (Akom, 2009). Horton et al. (2017) described how, through an integration of hip-hop culture and digital technologies, students developed two global citizenship practices -- compassion and creativity. Similarly, Warr and Sampson (2020) used the critical pedagogy strategy of engaging in critical dialogue with online doctoral students. Warr and Sampson (2020) created three different modalities for discussion -- asynchronous text-based, asynchronous video-based, and synchronous video paired with asynchronous text. They found students preferred synchronous video chats for critical dialogue, and through this mode were able to reflect on their own experiences and become more aware of multiple perspectives (Warr & Sampson, 2020, p. 866). Finally, Bradshaw (2017) developed an initial guide to support designers in taking up critical pedagogical approaches in their work. She focused on naming, critically reflecting, and taking appropriate action to transform harmful systems, practices, and dynamics (p. 19). For example, under critically reflecting Bradshaw encouraged designers to ask questions such as "How do my perspectives and practices protect me from seeing my own culpability in injustice?" (p. 23). When enacted together, these practices make up a praxis, a term coined by Freire (1970/1993) to describe the integration of action and theory required to implement critical pedagogy.

Attending to Issues of Social Justice in Learning Design: Ethical, Cultural, and Critical Perspectives

Although the three perspectives -- ethical, cultural, and critical -- are presented separately above, and scholars also tend to present their work as focused on one of these perspectives, in practice these foci are not completely distinct. As described by Moore and Ellsworth (2014), ethical issues include the cultural competence of the designer and the design. Similarly, critical perspectives almost always include attention to cultural context, as these contexts inform our meaning making around issues of power, including what becomes normalized and othered. Ethical, cultural, and critical perspectives are interrelated and complex, rooted in a socio-cultural approach to learning and learning design. Each presents learning design as more than a process of objective decision-making, or following the steps of a model. They provide insight into the ways design decisions are value judgments (Gray & Boling, 2016), situated with our previous knowledge, socio-cultural contexts and ways of knowing, our current roles and positionality, and the context of the design project. They also provide insight into the process of learning itself, situating it within learners' own socio-cultural contexts, ways of knowing, and roles and positionality. Opportunities to attend to issues of equity and inclusion, i.e., issues of social justice, emerge as values, experiences, and socio-cultural contexts interact during the learning design process.

At the same time, these three perspectives -- ethical, cultural, and critical -- are not necessarily the definitive perspectives on ways to attend to social justice issues in learning design. Designers may use one or more of these, or perhaps other perspectives not yet included in the literature. Each of these perspectives informs design practices,

however, the connection between these perspectives, social justice issues, and design practices are not fully understood. Design practices are also, in part, rooted in a designer's experiences and values (Campbell, Schwier, & Kenny, 2009; 2009; Gray & Boling, 2016). Therefore, in addition to, or perhaps integrated with, these perspectives, designers' experiences and values, and field-based knowledge such as instructional models and principles, all come together to inform practice on the ground. The ways these knowledges and perspectives come together and result in design practices in the context of negotiating issues of social justice is not well understood. In this study, I explore the relationship between learning design practices and perspectives (e.g., ethical, critical, cultural), values and experiences, and the design context, to better understand what it means to engage in socially-just learning design practices.

Methodology: Multiple Case Study

This study is a multiple case study that examined how LDT scholars took up issues of social justice as part of their design and research. In particular, this multiple case study (Stake, 2006) explored scholars' design perspectives, practices, values, and previous experiences, and the relationships between these and the design context. Previous research on the work of instructional designers (e.g., Fortney & Yamagata-Lynch, 2013; Gray et al., 2015; Kirschner et al., 2002; Wedman & Tessmer,1993; York & Ertmer, 2016) situated design practices in professional knowledge (e.g., design models and objectives), personal knowledge and beliefs, and the learning or instructional context. To study these situated practices, a researcher must employ methods that avoid reducing a phenomenon to its individual components but instead capture the intricacies and complexities of the phenomenon as a whole. Such methods typically include qualitative

approaches to data collection such as observations and/or descriptions of the work in action, reflections on this work by those who engage in it first-hand, and a rich description of the learning or instructional context (e.g., Stefaniak, 2021; Sugar & Luterbach, 2016).

Robert Stake's (1995; 2006) multiple case study methodology is ideal for this type of study. It is rooted in naturalistic, ethnographic, and phenomenological perspectives which, overall, attempt to make sense of the complex, relational, and situated ways in which humans experience the world (Madison, 2020). The purpose of research from these perspectives is not to find big-t 'Truths' or to establish 'facts,' but to engage deeply with the tensions that emerge between the particular and the general -- that is, between the situated findings of each case and the ways these cases inform an understanding of a broader phenomenon (Stake, 2006).

Thus, multiple case study is an ideal methodology for studying how LDT scholars took up issues of social justice as part of their design and research in this study. Each case represented a particular manifestation of an LDT scholar negotiating social justice issues as part of their research and practice. I then looked across cases to construct an understanding of this multifaceted phenomenon. By examining the phenomenon across multiple cases, this study examined the ways design practices are situated within an interaction between individual scholars and the contexts in which they engage with the phenomenon of interest (i.e., social justice issues).

This multiple case study is considered an instrumental case study. Stake (1995) explained that an instrumental case study is one where the focus of the study is a broader issue or phenomenon; the situated case(s) help the researcher to understand that broader

phenomenon (Stake, 1995). In general, multiple case studies are instrumental because the purpose of including more than one case is to compare across cases to understand something more general than each individual case can reveal (Stake, 2006). Therefore, this study is instrumental in that it used multiple cases to explore the phenomenon of negotiating social justice issues as an LDT scholar.

In an instrumental case study, Stake (1995) noted that the researcher is less concerned with applying particular methods (e.g., interview, observation) than about learning as much as they can about the phenomenon reflected through the case(s). To maintain a focus on the phenomenon itself, Stake recommended applying a conceptual structure to the study prior to data collection. In a multiple case study, the conceptual structure is made up of two components: (1) research questions that are rooted in disciplinary and theoretical perspectives and (2) the selection of key issues, rooted in the localized knowledge of each case (Stake, 2006). Because cases are immensely complex, it is impossible to attend to every context, every interaction, and every perspective. The conceptual structure created by the researcher therefore helps to bind the case. However, the researcher must also remain reflective and adaptive throughout the study. It is likely unexpected issues will emerge during the study that require adapting the plan, and perhaps even reconsidering the selection of the case(s) (Stake, 1995).

Below I discuss in more depth some of the key concepts related to Stake's approach to case study including: the creation of the conceptual structure, the bounding of cases, and the selection of cases. Following this, I situate these concepts in my study, and provide a description of my data collection and analysis based on this approach.

Creating the Conceptual Structure

Together, research questions and key issues make up the conceptual structure for a multiple case study (Stake, 1995; 2006). Research questions guide the analysis of the "quintain" which includes all the cases in a multiple case study (Stake, 2006, p. 4). The quintain is more than just a combination of all the cases; it is a representation of the phenomenon, here how LDT scholars attend to social justice issues, at a certain point in time. The research questions guide the study of the quintain, focusing on what we can learn across cases. These questions tend to be broad or general, while the study of each individual case is guided by localized key issues (Stake, 2006).

The conceptual structure is constructed as the researcher reflects on their initial experiential knowledge -- the, usually, etic knowledge gained through initial engagement with the case(s) -- and the theoretical and disciplinary knowledge they bring into the study. Together these inform the research questions and the selection of key issues, which in turn drive the data collection and analysis plan. As the study progresses, the researcher attempts to gain an emic perspective on the issues of the case, while also connecting this perspective to broader questions in their discipline. Through this continual reflective practice, both research questions and key issues may evolve over the course of the study.

In my study, my initial experiential knowledge of the phenomenon came from my own experience in negotiating issues of social justice as a developing LDT scholar. More details about this perspective are included in my positionality statement below. The theoretical and disciplinary knowledge guiding this study are rooted in the ethical, cultural, and critical approaches to LDT detailed in the literature review. In particular, I relied on socio-cultural and situated perspectives on how we learn, communicate, design,

and make meaning (e.g., Lave & Wenger, 1991; Vygotsky, 1978) and critical and feminist theories that center the ways difference and power are re/produced and negotiated (e.g., Freire 1973/1998; Crenshaw, 2018), and the application of these perspectives in learning design and research.

Research Questions and Selection of Key Issues

My conceptual structure is rooted in the overall phenomenon under study, i.e., how LDT scholars attend to issues of social justice. The research questions guiding this study include,

1. What **tensions** emerge for scholars of LDT when negotiating issues of social justice as part of their work?
2. What learning **design practices and perspectives** (ethical, cultural, and critical) do scholars of LDT employ when negotiating issues of social justice as part of their work?
3. What is the **relationship** between those **tensions, practices and perspectives,** and the **contexts** when negotiating issues of social justice?

The structure also includes the selection of key issues, drawn partly from the research questions (Stake, 2006). For example, key issues from my research questions included tensions, design perspectives, practices, values and/or experiences, contexts, professional roles, and the impact of socially-constructed identities. Each of these issues relates to how we perceive and make sense of others, and our roles, in context. These perceptions are directly related to the actions we take, or do not take, in our design and research.

For example, a scholar's personal experience with either oppression or privilege, and the extent to which they have reflected upon this experience as a manifestation of

larger social, economic, and political forces, impacts the ways they relate to others experiencing oppression or privilege. It also impacts the way they frame these experiences, i.e., as personal successes or failures, or as connected to broader systems.

Bounding the Case

A case must be bound in order to allow for study (Stake, 1995). The conceptual structure is used to identify what aspects of the case and its contexts need to be included in the study. As stated above, my study focused on how LDT scholars attended to social justice issues by examining their design perspectives, practices, values and/or experiences, and the ways these interacted with the context of their design and research work. Aspects of the cases and their contexts that do not serve to further my understanding of these issues were, therefore, outside the bounds of the case.

Stake (2006) suggested using a graphic form to illustrate the design of each case in a multiple case study. Figure 5.1 presents the design of my study in this form. The figure, adapted from Stake's (2006) suggested graphic, includes the contexts involved and the collected data for each case. The bounded case is represented by the bolded circle in the middle. This bolded circle contains a list of the data sources that informed my understanding of each case. Around the main circle are smaller circles representing various contexts that influenced the case. In my figure, the context circle representing the project is larger than the others, and the overlap with the case is visible. This represents the relative importance of the project context to each case, and its role in the production of data, e.g., scholarly and public documents. The context circles permeate the case while also remaining partially outside the case. This visually represents the fact that not every aspect of these contexts is possible to study; some aspects remained outside of the case

while others were integral. Therefore, a case study always represents a partial but purposeful understanding and representation of a case, as well as the broader phenomenon under study (Stake, 2006).

Selecting Cases

To select a case, we must first identify what "counts" as a case. Stake (1995) described cases as "integrated system[s]" made up of multiple working parts such as activities, interactions, and environments (p. 2). A case study focuses on the working parts of a case and the ways they interact with each other and various contexts. Cases are specific entities, such as a program or a person (Stake, 2006). A case must be specific enough to study, while also broad enough to provide opportunities to observe interactivity between the working parts and the context. Interactivity is the reciprocal interaction between the working parts and the context, or, the ways activities and environments mutually impact each other. Stake (1995) explained that a teacher can be considered a case, whereas a specific teacher's motivation to engage in innovative teaching is not a case. Conversely, the phenomenon of innovative teaching is not specific enough to serve as a case.

However, in an instrumental multiple case study, specific cases are studied to make sense of a broader phenomenon, such as the motivation for innovative teaching. In this approach, the researcher is interested in both the specifics of the cases and what they reveal about a broader phenomenon. In this study, I was interested in the ways LDT scholars attended to issues of social justice in their work. Therefore, the scholars were the cases; negotiating social justice issues was the broader phenomenon.

To select a case for an instrumental multiple case study it must be: (1) relevant to the phenomenon being studied, (2) provide diversity across contexts, and (3) provide a good opportunity to learn about complexity and contexts (Stake, 2006, p. 23). Case selection is largely driven by the conceptual structure of the study. The general advice Stake (2008) provided for case selection was to "choose that case from which [you] feel [you] can learn the most" (p. 130). In multiple case studies, this means selecting both typical and atypical contexts to explore how the phenomenon under study emerges in varying contexts.

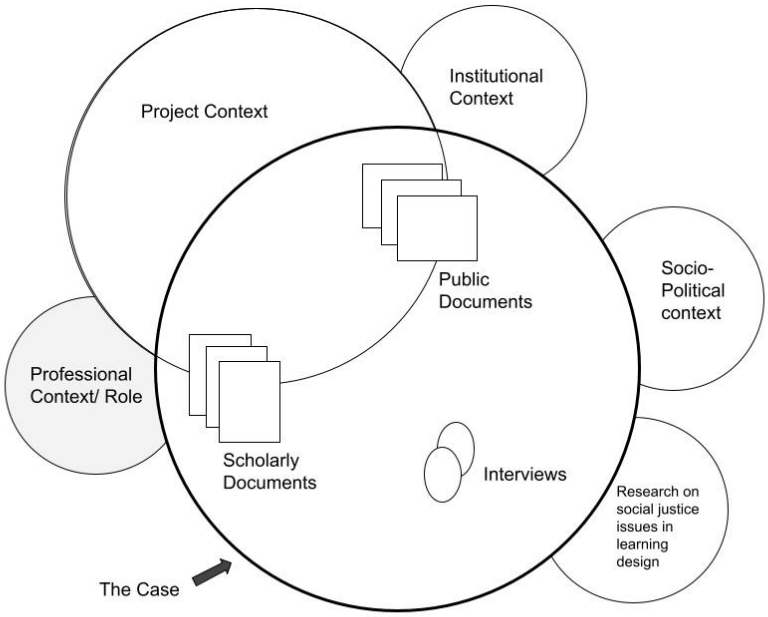
In order to select cases, the researcher needs to consider what activities and contexts are being represented, and how, in each case. To do this, Stake (2006) suggested identifying attributes of interest that help determine whether a case meets the three criteria listed above. For example, in my study I was interested in LDT scholars who negotiated issues of social justice in their work. Attributes of interest included things like types of social justice issues (e.g., economic disparity, racism, gender bias), institutional contexts (e.g., R1 universities, community colleges, school districts), social identities of the scholar, and role or position of scholar (e.g., graduate researcher, instructional designer, associate professor). Looking across cases, these attributes can help ensure relevance, diversity, and complexity in the study.

However, Stake (2006) warned against using attributes in an attempt to create a representative sampling. It is usually not possible to create a true representative sampling of cases, and in case study representation is generally not the goal. Instead, the goal is to develop an understanding of interactivity, i.e., the ways a phenomenon emerges within the complexities and situatedness of each case. This is best seen by comparing the

phenomenon across cases. In order to attend to both interactivity across cases and the uniqueness of each case, Stake (2006) suggested selecting between 4 and 10 cases. Additionally, issues of access, willingness on behalf of participants, and other situational or logistic aspects may need to be considered when selecting cases (Stake, 2006).

Figure 5.1

Adaptation of Stake's (2006) Worksheet: "Graphic Design of a Case Study" (p. 5)

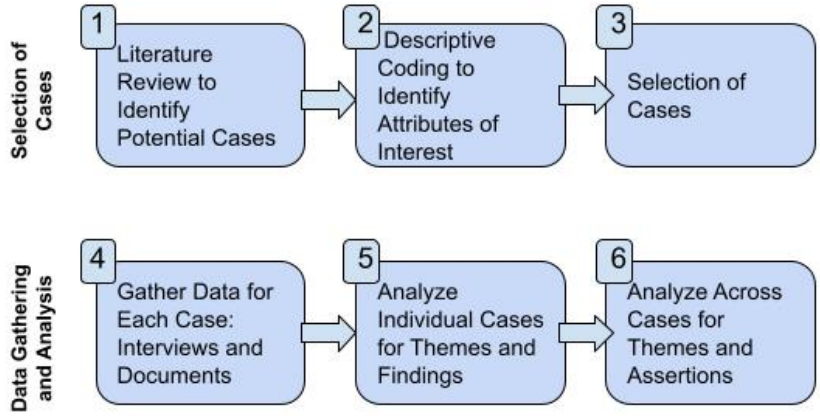


Research Plan: Negotiating Social Justice Issues in LDT

Figure 5.2 displays an overview of the research plan for this study. The figure includes two main steps: (1) the selection of cases and (2) data gathering and analysis. Below I provide details on each of these steps, focusing on central aspects of Stake's (2006) approach to analysis: the case-quintain dilemma and dialectic, triangulation, and themes and assertions.

Figure 5.2

Overview of Research Plan



Selection of Cases

An important part of any multiple case study is the selection of cases. Each case in my multiple case study is a scholar who engaged in issues of social justice in their research and design. To identify potential cases, I began by reviewing the scholarly literature for articles related to social justice work in LDT. Then I descriptively coded this literature (Saldaña, 2016). The codes I developed then became the attributes of interest I used to select cases for further study (Stake, 2006). This process of case selection, which is described in detail below, helped ensure that my cases were relevant to the phenomenon being studied, provided diversity across contexts, and provided a good opportunity to learn about complexity and contexts.

Literature Review to Identify Potential Cases

To begin identifying potential cases, I first reviewed the literature; my goal was to identify potential cases that were relevant to the phenomenon being studied. For a case

to be relevant to my study, I first looked for a demonstrated acceptance of their work by peers in the form of peer-reviewed journal articles. Two primary sources of literature offered a robust applicant pool, the first being a 2021 special issue of the Journal of Applied Instructional Design on Attending to Issues of Social Justice in Learning Design and the second the presenters at the 2021 AECT Summer Research Symposium on Toward Inclusive Learning Design: Social Justice, Equity, and Community. Both publication outlets are associated with the major scholarly conference in the field of LDT.

Descriptive Coding to Identify Attributes of Interest

Once I created a list of scholars' names and associated manuscripts, I used descriptive coding to assess the literature based on my conceptual structure (Saldaña, 2016, p. 102). Descriptive coding served the function of categorizing or providing an overview of the themes and ideas in the literature of interest to my study (Saldaña, 2016). These descriptive codes reflected the attributes of interest relevant to my study. For example, the type of institution (e.g., R1 university, K-12 system), professional roles of the scholar (e.g., PI on a grant, associate professor, graduate student), and the social justice issues in the work (e.g., gender identity, dis/ability, race) were all used as descriptive codes. I also indicated whether the manuscript focused on ethical, cultural, or critical perspectives.

Final Selection of Cases

Stake (2006) recommended selecting cases that are relevant, diverse, and complex. For multiple case studies, the research questions, attributes of interest, and potential for revealing interactivity must all be considered when selecting cases -- each helps determine what makes a case relevant, diverse, and complex. In other words, the

individual case, what that case adds to our understanding of the quintain, and what the quintain may reveal about the phenomenon are all important to consider. Therefore, in my selection of cases I first reviewed the frequency and distribution of the descriptive codes identified in the previous step. I then removed manuscripts that were conceptual or theoretical to focus on the negotiation of social justice issues within active projects.

For each potential case, I looked at the project goals, audience, and context, as well as the scholars' various identities (e.g., role in institution, gender identity), paying close attention to the ways social justice issues intersected with each of these components. Looking across cases I noted the more and less common attributes. There were many potential cases of white, female scholars but less of male scholars and scholars of color. There were few graduate students and assistant professors, and more scholars at the associate level or higher. Keeping in mind Stake's (2006) directive to select cases that represent both the more and less common attributes, I created an initial list of cases that included one graduate student, seven faculty members -- two at assistant level, two at associate, and three full professors, and three designers who worked in higher education. Of these, three cases were males and eight were female; seven worked in the US while four worked outside of the US (e.g., Northern Africa, South America, and Canada). The cases were also racially diverse and included black, white, Latinx, and Arab individuals. Therefore, I ensured interactivity across cases by selecting cases with a diversity in audience, gender, race and ethnicity, location, and the scholar's role and standing.

I judged the potential for complexity within a case by looking at the social justice issues relevant to each case, as well as the project goals and team members. In particular,

I selected cases that described social justice from a critical theoretical approach. A critical approach provides a robust perspective on the complexities that are inherent when negotiating social justice issues as a part of learning design such as the connections and tensions between people's identities, lived experiences, and the broader socio-cultural-historical context (Nichols & Allen-Brown, 2001). In the context of the LDT field, exploring these tensions can reveal how scholars negotiate design practices with their identities, professional roles, the goals of the project, and the people affected by their work. Cases were selected based on their situatedness in social justice issues and their engagement with a critical approach towards issues of justice.

Data Gathering

After reaching out to the 11 selected cases, seven indicated a willingness and ability to participate in the project. I gathered additional data for each of these seven cases. As illustrated in Figure 5.1, these included: scholarly documents (e.g., published articles, grant proposals), public documents (e.g., social media posts, project summaries, reports), and interviews. Each data type and collection method are described in detail below.

Scholarly and Public Documents

Documents included text-based documents, but also multimodal materials and other artifacts such as podcasts and conference presentations (Prior, 2011). Documents are socially-situated, created for a particular purpose in a particular context (Prior, 2011). Because of this, documents can support several purposes in research. Researchers collect documents to better understand the various contexts of the case, certain activities or events, and to gain the perspectives of those involved in the case. In case study,

documents serve mainly as a record of "activity in its situation" (Stake, 2006, p. 27). In other words, the content of the document (i.e., the activity described) is as important as the context in which it was created (i.e., the situation). Both can be revealed through an analysis of use, function, and form (Prior, 2011).

In this study, documents are particularly important as records of "activity in its situation" because I was not able to observe such activity directly (Stake, 2006, p. 27). I first collected scholarly work, including conceptual and empirical articles. Scholarly documents are produced to share knowledge about design and research practices, as well as the context in which these practices were implemented. Therefore, these documents provided an initial understanding of each scholar's project's context, social justice issues, and the ways these interacted with their design and research practices.

Additionally, because the project context was so critical to the case (see Figure 5.1), I aimed to understand this context and the ways it interacted with other contexts (e.g., professional and institutional) and situated the cases. Types of documents that supported an understanding of these contexts included institutional and organizational mission statements, social media posts, websites, and materials for/by the press (e.g., grant application summaries, institutional news articles).

Critical Event Interview

In case study, data is collected to understand the perspective of the individual who experienced the phenomena under study first-hand. A critical event narrative is a description of a time-bound, single event told by the person who experienced it, focusing on their perceptions and actions, i.e., how they made decisions during the event (Webster & Metrova, 2007). I collected critical incident narratives from my participants using

interview prompts. These narratives are examples of what Stake (2006) referred to as "experiential descriptions;" in my study they were descriptions about how the participant negotiated issues of social justice in their work (p. 33).

To collect these narratives, I pulled from the critical incident technique and narrative inquiry to create an interview protocol (See Appendix A). The critical incident technique (CIT) was developed in the 1940s as a way to gather data on real-world human behavior (see Flanagan, 1954, cited in Webster & Metrova, 2007). First, one identifies the behavior or activity they want to study and the contexts in which this behavior or activity occurs, and then observational, interview, and/or survey data is collected and analyzed (Butterfield et al., 2005). In CIT, participants are asked to recall a specific, 'critical,' moment and provide details about what occurred during this moment.

Constructing a critical event requires the participant to recall their actions, situate or make sense of these actions, and then reflect on their meaning in the present (Webster & Mertova, 2007). In other words, it requires the participant to construct a narrative, or story, about their experiences that connects the past and present. Although narratives are a natural way for people to make sense of their experiences (Bruner, 1991), gathering narratives from participants is not always successful (Elliott, 2012). Webster and Mertova (2007) recommended asking participants to recall specific moments or time-bounded events rather than asking general questions, or questions that require the participant to attend to a long period of time. In my interviews, I first asked some general context questions such as how they got involved in the project and about the project members. Following this, I asked participants about a time they had to negotiate issues related to

social justice in this work. Additional prompting questions were included to assist in the narrative production. All interviews were conducted using Zoom.

In addition to the critical incident, I also asked three of the four question-types detailed by Stake (2006): (1) basic research questions, (2) zeroing in on a main research issue, and (3) immediate problems. (The fourth question type - measurement data - involves asking quantifiable questions and was not applicable to this study). Basic research questions ask the participants for their opinion on the broad phenomenon under study, here the negotiating of issues of social justice in learning design professional practice. The other question-types required tailoring to the specific case (Stake, 1995). For example, zeroing in on a main issue involved taking initial case data asking the interviewee to explain it, or to confirm or reject my intial assessment of the data. Immediate problems questions asked the interviewee to provide potential solutions to identified problems or issue questions in the case. These additional questions allowed me to directly ask the participant about how the attributes I selected (e.g., design perspectives, practices, values and experiences, tensions, etc.) related to their project.

Data Analysis

In a multiple case study, data analysis requires a constant back-and-forth between parts and the whole, the specific and the general (Stake, 2006). For individual cases this means moving from a focus on the situated complexities of the case to the key issues and broader research questions related to the phenomenon under study. Stake (1995) instructed the researcher to “return to these foci [key issues] over and over” (p. 85). Through this process, the researcher constructs findings (Stake, 1995; 2006). In the

multiple case study, it means moving back and forth between these situated case findings to what they tell us about the quintain and the broader phenomenon (Stake, 2006).

Therefore, in a multiple case study it is necessary to first complete analysis of each individual case and then complete an analysis across cases. Stake (2006) differentiated between the analysis done on an individual case and the cross-case analysis by referring to the individual case as creating "findings" and the overall study as creating "assertions." Both findings and assertions are representations of the meaning constructed through interactions between the specifics of/across the cases and the generalized research questions. Two methods detailed by Stake (1995) for this work include categorical aggregation and direct interpretation. Both involve searching and finding patterns, and can include coding, an immediate reflection on "what did that mean," or both (Stake, 1995, p. 74). These patterns are organized by theme, which are simply the research questions and key issues identified throughout the case. The researcher then analyzes these patterns to produce findings for each theme present in the case. These findings are then used to create assertions in the cross-case analysis.

Below I detail how I engaged in analysis for each cases' data sources – scholarly and public documents and the critical incident interview -- guided by my conceptual structure, and how this analysis was used to construct case findings. I then describe how I engaged in the *Case-Quintain Dialectic* (Stake, 2006) to complete cross-case analysis and construct assertions about the phenomenon of LDT scholars negotiating issues of social justice.

Analyze Individual Cases for Themes and Findings

In a multiple case study, the individual cases are important in and of themselves. As much as possible, the researcher should keep intact the situatedness of each case during the overall analysis (Stake, 2006). To assist in this, each case should be analyzed for themes and findings. The key issues that emerged during the study become themes. Then the data is organized and analyzed to create findings around each theme. There are often several findings for each theme. In my study, there were two types of data analyzed and integrated to create findings: documents and interviews.

I began by structurally coding all interview data and scholarly documents by theme. Themes are broad, high-level, categories that relate to the research questions and key issues in each case (Stake, 2006). For example, themes in this study included the *what,* i.e., the design practices used and the issues of social justice attended to, and the *why,* i.e., the values, perspectives, and other issues informing designers' practices and decision-making. Structural codes were a way to tag these areas of interest in the data. This was helpful for two reasons. First, tagging these areas of interest indicated where to focus my second round of analysis. Second, tagging these areas of interest allowed me, using Nvivo software, to pull all the instances of each code across data types. For example, I was able to view all instances of "design perspective" within the interview and documents at the same time. It also allowed me to pull instances across cases, and therefore supported both the single case and cross-case analysis.

The structural codes attended to both the *what* and the *why* of negotiating issues of social justice in design research and practice and are listed in Table 5.2. Codes relating to the *what,* e.g., 'design practices' and 'social justice issues,' provided a simple, high-

level tag indicating spaces where participants explained specific design practices and/or specific issues of social justice in their work. Codes relating to the *why,* e.g., 'design perspectives,' 'experience,' and 'value,' were identified based on the instructional design literature and socio-cultural theories of learning.

For example, as detailed in the literature review, common design perspectives that orient towards social justice in LDT include ethical, critical, and cultural perspectives. Therefore, 'design perspective' became a structural code. As Gray & Boling (2016) and others (e.g., Campbell, Schwier, & Kenny, 2009; Nelson & Stolterman, 2003) explained, designer's values and previous experiences impact their design practices and decision-making. Each of these -- value, experience -- also became a structural code. Related to this, the feminist constructs of intersectionality (see Crenshaw, 2018) and situated knowledge (see Haraway, 1988) reveal the impotence of social identities in our lived experiences and the ways we make sense of others, ourselves, and the broader world. LDT scholars have used such theories to explore their experiences as designers, focusing on their multiple social identities (Campbell, 2015; Romero-Hall et al., 2018). 'Identity,' and 'intersectionality' were used as structural codes to indicate spaces where participants discuss their identities and the ways these intersect and produce particular experiences and ways of knowing. Finally, socio-cultural contexts are critical to understanding the practice of design (Yamagata-Lynch, 2014). The code 'socio-cultural context' indicated anywhere participants described the context of their design project, their target audience, or their own experiences.

Table 5.2

List of Structural Codes

Structural Code	Description	Example
Design perspective	Participant's approach to design research and/or practice	*"Well, it started with just indigenous perspectives… then through that process, we realize[d] like it really is everybody's culture… learning about other cultures is really learning about your own culture"*
Design practice	Specific strategies or tasks the participant and/or design team-members engaged in during the design process	*"One of the things that I have found…to understand people is to hear them in their voices and so as part of these projects, what we often do is do a lot of Flipgrid, where…a person can…share their stories."*
Experience	Previous or current professional and personal experiences related to design, research, and/or social justice	*"As a learner I experienced that and I think that's valuable. It kept my brain and my perspective open. It allowed me to bring a capacity for bringing a generous eye to the validity of arguments everyone has."*
Identity	Description of the socio-cultural, racial, ethnic, professional, personal identity(ies) of the participant and/or team members	*"I think it's understanding that if you want to be doing the work you have to be authentic with yourself and saying this is how I contributed to this system by virtue of being a man in that [removed] Community, I am part of the problem."*
Intersection-ality	Description of the ways socio-cultural identities of the participant and/or team members, stakeholders, etc., were made salient during the design process	*"And primarily we just started with generally the knowledge systems of like I'm not native. There are certain things that I cannot know. There are certain things I don't understand. And in, in contrast some of …the native members of our team had other tensions that they voiced"*
Social justice issue	Issues related to equity, inclusion, access, etc., related to the design process	*"When we talk about social justice, we tend to think of it related immediately to race right…But I think it's also regional…In [removed], for example, the state is unequally connected and distributed in terms of resources and connectivity."*
Socio-cultural context	Description of the context of the project, and/or previous experiences	*"Working to develop and design family and community programming that engages folks in culture, technology, science, and art through*

		both digital and non-digital technologies, and so the overarching goal for that project is to preserve and share culture"
Tension	Description of two or more forces coming together without an immediate resolution	*"I've been asking why can't we get them, what is it that I'm not getting and I think part of that I've been starting to come through slowly that a) I'm not understanding, either I'm not understanding their language or b) I'm not understanding them, the way that they want me to understand them."*
Value	Indication of a moral and/or ethical belief or focus of the participant or team members, or stakeholders, or institution/organization	*"So part of that is like honoring the reciprocal relationship that needs to happen, like if I'm going to ask someone to share a piece of their lives with me but I'm not willing to share that piece of my life with them, that seemed a little problematic."*

After structural coding was complete, I engaged in a second level of analysis with in-vivo coding. In-vivo coding focuses on the participant's own words, and added situated detail to the structural codes. For example, in-vivo codes revealed what a structural code like "value" meant for that particular scholar in that particular context. This two-level approach supported the analysis and construction of findings across data types within each case and, eventually, across cases.

Table 5.3 illustrates my overall analysis process and describes the purpose of the analysis for each data type. Each data type went through two levels of analysis, although findings came from integrating across sources (i.e., not from any single data type). Table 5.3 also indicates which research question the data type was most useful in answering.

Table 5.3

Overview of Data Analysis for Individual Cases by Data Source

Data Type	Analysis Level 1	Analysis Level 2	Purpose	RQ Alignment		
				1	2	3
Scholarly Documents	Structural (theme) coding	In-vivo coding, categorization, connections across data	Identify in scholar's own words their design practices, as well as the ways these practices are situated in context		X	X
Critical Event Interview	Structural (theme) coding	In-vivo coding, categorization, connections across data	Provide information on the scholar's beliefs, feelings, and meaning making in and post action. Reveal different aspects of practices, as well as the emerging tensions and interactions between the tensions, practices, and context.	X	X	X
Public Documents	Structural (theme) coding	Connections across data	Construct an understanding of the socio-cultural-historical contexts of relevant project(s), institution(s) and identify ways this context interacts with scholar's practices and perspective.		X	X
Follow-up interview / Member Checking	Connections across data	N/A	Triangulation with scholarly documents and critical event narrative; member checking; elaboration on tensions and practices; gather scholar's perspective on the overall phenomenon	X	X	X

Public Documents. Public documents were included to develop an understanding of the socio-cultural-historical context(s) of a case. This contextual knowledge was then integrated with the analysis from other sources to construct an understanding about the emerging tensions (RQ#1) as well as the interactions between tensions, design practices, and context (RQ#3).

Scholarly Documents. Scholarly publications are generally created to detail some aspect of a researcher's practice, including an application of a theory or method in a particular context, or the impact of a design practice or product. Therefore, these documents served a critical role in understanding the first second question: What design perspectives and practices do scholars of LDT employ when negotiating issues of social justice as part of their work? I used in-vivo coding to capture the scholar's design practices in their own words. The practices identified through these documents were compared to those in the critical event narrative for triangulation and to develop a deeper understanding of how these practices were used and developed in practice.

Additionally, these publications often detailed the philosophical and theoretical perspectives that grounded the scholar's practice (e.g., cultural, ethical, and critical). These further situated the practices and provided a deeper understanding of how they connected to values and/or experiences and context.

Critical Event Interview. The critical event interview was designed to elicit descriptions of the scholar's actions in situation, i.e., their design practices and the contexts within which these were implemented. Each interview was transcribed and then structurally coded. Following this, I used in-vivo coding within each theme to capture the participant's own words about their design perspectives and practices, values and experiences, social justice issues in the context of their design and research. Additionally, in the critical event narrative, I focused on understanding the emerging tensions participants encountered while negotiating issues of social justice (RQ#1). This included identifying tensions between project goals and the community, identifying tensions between project leaders' understandings of social justice, and ethical or moral conflicts.

Through these, an understanding of the participant's perspective, design practices, and the ways these interacted with the specific context was constructed (RQ#3).

Triangulation Within Cases. In general, triangulation supports the validity of a qualitative study by ensuring multiple sources of data are collected and assessed and that any findings put forth by the researcher are backed by evidence from these multiple data sources (Fusch, Fusch, & Ness, 2018). In a multiple-case study, triangulation within a single case allows the researcher to move between the parts and the whole, i.e., the data and the case, to construct findings for the case. Data represent a sampling of the interactions and nuances existing within a case, not the entirety of a case (Stake, 2006, p. 77). Therefore, different data sources provide slightly different perspectives on the activities in the case and the ways these interact with the context. Comparing across these multiple perspectives helps the researcher to make sense of the case, i.e., to construct findings. Stake (2006) claimed, "Each important finding needs to have at least three (often more) confirmations and assurances that key meanings are not overlooked" (p. 33). These confirmations and assurances come from engaging in several strategies such as including multiple observations and perspectives and collecting multiple data sources (e.g., document and interview) (Denzin, 1989, as cited in Stake, 2006). Additionally, member checking and reporting multiple perspectives or potential differences in interpretation also support the triangulation of findings (Stake, 2006).

In the individual case studies, triangulation was first supported by collecting multiple data types and integrating these data during analysis to construct findings. I analyzed the in-vivo codes by theme (the structural codes) across both interviews and documents to develop categories and findings. Secondly, triangulation was supported

through member checking. After the critical incident interview my initial findings were sent to the participant to gain confirmation, clarification, and/or correction. This confirmation and clarification happened via email for some participants and in a second interview for two participants. By moving back and forth between multiple data sources, the specifics of the case, and the broader phenomenon represented by the research questions, I was able to gain an understanding of the interactions between design perspectives and practices, tensions, and context across cases. This idea of crisscrossing in the analysis, i.e., comparing contexts and activities, is very important for the validity of any observation or generalization made in multiple case study (Stake, 2008).

Analyze Across Cases for Themes and Assertions

The Case-Quintain Dilemma / Dialectic. Both the individual cases and the quintain are the focus in a multicase study, and this creates a tension that Stake (2006) referred to as the case-quintain dilemma. This dilemma is epistemological in nature; it asks what is worth knowing -- localized or generalizable knowledge (Stake, 2006). However, this tension is not an insurmountable problem, rather, it drives the analysis of a multiple case study similarly to the ways the tension between the specifics of a case and the generalizability sought after by the research questions drives the analysis of a single case study. There is no quintain without the cases, no cases without a quintain.

Stake (2006) moved the discussion of the Case-Quintain dilemma towards the Case-Quintain dialectic as a way to support cross-case analysis. A dialectic is a way of thinking that embraces contradictions to develop new understandings (Freeman, 2017). Dialectical thinking has 4 key characteristics,

1. Everything is interconnected and made up of dynamic intersecting parts

2. Change is inevitable and is the result of friction within, and between, living and nonliving organisms
3. The movement of change is cyclical and continuous
4. Dialectical thinking works with, and against, the dialectical movement of change (Freeman, 2017, p. 50-54).

Dialectics positions both the case and the quintain as dynamic and situated -- each is made up of dynamic intersecting parts. These dynamic, intersecting parts are different and play out differently in each case. The difficulty in a multiple case study is embracing these differences as a way of understanding the individual cases and the quintain (as well as the broader phenomenon these represent). Rather than attempt to eliminate differences, the dialectic looks to account for the ways multiple perspectives exist and play out in the processes under study (Lather, 1986 as cited in Freeman, 2017). In line with this approach, Stake (2006) suggested holding both the case and the quintain in mind while engaging in analysis. In practice, this requires continual and repetitive movement between case findings, themes, and research questions looking for both patterns and atypicalities.

Stake (2006) provided specific directions in line with dialectical thinking for cross-case analysis which maintains the individual case findings and situationality throughout the analysis (p. 46). He instructed researchers to apply each case's "findings of situated experience to the research questions of the Quintain" (Stake, 2006, p. 47). Figure 5.3 is an adaptation of Stake's (2006) worksheet created to organize this work. I used this worksheet to look across cases and themes at the same time. To complete this worksheet, I first created a report for each case that included not only the overall findings

but also an assessment of the data identified around each theme. These reports were then printed out by theme and laid next to each other as in Stake's (2006) worksheet, so I could simultaneously view all the case findings by theme. This ensured the complexity and situatedness of each case was considered while I engaged in the cross-case analysis. I looked across cases to better understand how each theme related to the phenomenon as a whole, and then evaluated these findings for each research question.

Triangulation Across Cases. Triangulation across cases engages with the multiple case findings and evidence to make sense of the broader phenomenon under study. This practice helps to ensure assertions made about the quintain are valid and rooted in multiple sources of evidence. Unlike the individual case analysis, the objective of the cross-case analysis is to describe the quintain, "which was not studied directly" as well as the cases, which were (Stake, 2006, p. 77). Because the quintain was not directly studied, the researcher must be careful to root all assertions in case findings. The researcher must also provide evidence of "newly understood relationships" about the phenomenon through these case findings (Stake, 2006, p. 77). In other words, the assertions should be more than simply a restatement of the case findings -- they should reveal a rich, situated understanding of the phenomenon under study.

In addition to the triangulation strategies listed above (e.g., multiple perspectives, member checking), Stake (2006) suggested redundancy and skepticism during the entire process of "seeing, hearing, coding, analyzing, and writing" (p. 77). For example, while completing the worksheet shown in Figure 5.3, I needed to constantly go back to the cases to confirm the findings, and to look at the contextual reasons for these findings to

compare across cases to produce a situated explanation and understanding of the contradictions.

Figure 5.3

Adaptation of Stake's (2006) Worksheet: "Matrix for Generating Theme-Based Assertions from Case Findings Rated Important" (p. 51).

	Themes							
Case 1: Scholar Smith	1: Experience	2: Values	3: Practices	4: SCH	5: Design perspective	6: Social identity	7: Professional role	*And so on*
Finding I								
Finding II								
Finding III								
Case 2: Scholar Jones								
Finding I								
Finding II								
And so on...								

Assertions. Assertions are the findings of the quintain; these emerge as a result of the cross case analysis. Assertions are what we can say at the end of our study about the broad phenomenon under investigation, based on the specific representations, i.e., cases, included in our study (Stake, 2006). Assertions must (1) have a single or common focus,

(2) make a contribution towards understanding the quintain, and (3) contain evidence from more than one case (Stake, 2006, p. 50). At first glance, the worksheet and this list of characteristics may make assertions appear like mere summaries or syntheses of case findings; they are not.

Creating assertions is a complex, dialectic process that occurs over time as a researcher re/reads and re/considers evidence. Stake (2006) provided three tracks to follow for cross-case analysis. The first track "best maintains the Case Findings and situationality" (p. 46). Social justice issues are deeply rooted in socio-cultural-historical contexts and understanding the ways these issues are attended to by scholars requires attention to the situatedness of each case. Therefore, I used Stake's (2006) first track to construct assertions. This track involves three assessments: (1) assessment of individual cases based on a/typicality, (2) assessment of individual cases based on their relevance to each multiple case theme, and (3) assessment of individual case findings based on their importance to understanding the quintain, in terms of each theme. These assessments were completed multiple times throughout the analysis process, as I moved between the cases and the quintain, the parts and the whole.

Continually assessing each case for a/typicality, relevance to themes, and importance to themes required thinking about the specifics of each case while also comparing across cases and thinking about the quintain as a whole. Organizing this work by theme allowed me to focus deeply on the key aspects of the phenomenon, while accounting for the specifics of each case. Stake (2006) provided multiple worksheets and assessment codes to assist with this work. These worksheets make connections and themes visible across cases. However, constructing these connections and themes and

assessing individual case findings and contexts does not occur by simply filling out these worksheets. The analysis of data and creation of assertions also requires a reflective and reflexive practice.

A Reflective and Reflexive Practice

Stake (1995) argued that data gathering involves both privilege and obligation for the researcher: "The privilege to pay attention to what they consider worthy of attention and the obligation to make conclusions drawn from these choices meaningful to colleagues and clients" (p. 49). To balance these two forces, he suggested a reflective practice. A reflective practice requires continually reflecting on the data being gathered, the research questions, and the conceptual structure of the study. This practice both focuses the researcher and creates opportunities for the formation of new or unexpected connections or ideas.

In addition to reflection, qualitative research requires a reflexive practice. Reflexivity requires a researcher to attend to their own values and perspectives and how they impact and inform the study, as well as how this changes over the course of the study (Palaganas et al., 2017). As Stake (1995) wrote, "Research is not helped by making it appear value free" (p. 95). We all bring values, previous experiences, and ways of knowing into research projects -- the purpose of a reflexive practice is to make these transparent and to address the ways they impact the study. As researchers, we need to be transparent about the impact of underlying assumptions and values on the ways we construct a research study -- from the development of questions and issues, to data gathering and analysis. Reflexivity frames research findings as just one way of

understanding, rooted in a particular conceptual structure, i.e., our theoretical, disciplinary, personal, and experiential knowledge.

Below I provide my positionality statement, which outlines the various experiences, values, and beliefs I bring to the current study.

Positionality Statement

My experiences both in and outside of the field of LDT negotiating issues of social justice inform this study. Outside of academia, I spent over 10 years engaged as a community organizer pushing back against the various material consequences structural issues such as racism, sexism, and classism have on peoples' lives. These experiences shaped my understanding of social justice as something tangible -- the difference between having a safe space to sleep or not -- as well as something connected to broader social systems. It was possible to create individual short-term solutions, but long-term solutions required changes to these systems. As a community organizer, much of my work involved interrogating the ways social structures impacted individual lives and learning about the ways people in the past pushed against these structures to inform my work in the present.

When I entered graduate school, I knew I ultimately wanted to integrate these experiences and my new field of LDT. However, it was not always clear how to go about this work. After some negative experiences that left me feeling academia was, perhaps, not a place where social justice work occurred, I was asked to join a K-12 research practice partnership (RPP) as a graduate research assistant. This RPP centers issues of

social justice, in particular the ways historical racial and economic inequity continues to impact a community in the present (see Lawton et. al, 2020; Walters, Kopcha, & Lawton, 2021).

Through this work I have learned that negotiating issues of social justice as educators and learning designers is quite different from my previous work as a community organizer. In particular, the goals, teams, timelines, and contexts can vary greatly between community organizing and an RPP. And these differences are critically important when it comes to attending to issues of social justice in both learning design and research. For example, narratives around economic and racial oppression can become powerful forces of change in community organizing, whereas in the classroom a focus on such narratives may be seen as harmful and disempowering (see Walters & Kopcha, in press). Learning design and research around issues of social justice require both a set of practices and skills to build connections and understanding between/across team members (e.g., teachers, administrators), and a set of practices and skills that center these relationships and perspectives when designing curriculum and learning experiences. My experiences as a research assistant trying to navigate these issues, engage in critical practices, and define this work partly led to the current study.

In addition to these experiences, I work with others in the field interested in social justice issues in a variety of ways. I joined as a co-editor on a special issue on Attending to Issues of Social Justice in Learning Design for the Journal of Applied Instructional Design. I also worked with the Graduate Student Working Group of the Culture, Learning, and Technology division of AECT to host webinars in summer 2021 about applying critical theoretical perspectives to learning design and research. Modified

versions of these webinars were also presented at the annual convention. Additionally, I participated in AECT's annual summer research symposium. Toward Inclusive Learning Design: Social Justice, Equity, and Community. Overall, this work informs my study in the sense that (1) I learned about other scholars who are, and have been, interested in the ways issues of social justice intersect with learning design, (2) I began to build a network with these scholars, and (3) I started to look across our work to construct an understanding of how the field, historically into the present day, attends to social justice issues in design and research.

Therefore, my position as a graduate student becoming a scholar in LDT who attends to social justice issues in their work helped guide the study. My networking experiences have helped me to find like-minded scholars, some of whom offered assistance with this study. My research and design experience also helped me make sense of the experiences of others. However, my position also has some limitations that I needed to reflect on throughout the study purposefully and regularly. First, my experience with social justice issues both in and out of academia has been with issues related to gender, race, and economics in the US south. This potentially biased me towards studies with a similar focus and creates a frame through which I view other studies. This frame may lead to me having overlooked nuances that emerged from the interaction of other social justice issues and socio-cultural-historical contexts. Additionally, I have little experience engaging with social justice issues globally or in countries outside the US. Therefore, part of my reflexive practice included ensuring scholars who work in contexts unrelated to my own interests and experiences were selected, and carefully attended to through critical reflection.

Quintain (Across-Case) Findings

This study aimed to build an understanding of the design practices used by LDT scholars when negotiating issues of social justice in their research and practice. To accomplish that goal, this study was guided by one overarching research question:

How do designers negotiate social justice issues in their research and professional practice? To answer that overarching question, I explored the following sub questions,

1. What **tensions** emerge for scholars of LDT when negotiating issues of social justice as part of their work?
2. What learning **design practices and perspectives** (ethical, cultural, and critical) do scholars of LDT employ when negotiating issues of social justice as part of their work?
3. What is the **relationship** between those **tensions, practices and perspectives,** and the **contexts** when negotiating issues of social justice?

Below, I first answer the overarching question that drove this study. To answer that question, I first provide an overview of the process that participants in this study employed as they negotiated issues of justice in their research and practice. The process, which appears in Figure 5.4, was established by bringing together the common elements that emerged across the participants' data and arranging them in a way that describes the overarching relationship between the sub questions in this study -- that is, between the tensions, design practices and perspectives, and the contexts reflected across the cases. I then explore how those relationships played out within specific cases or groups of similar cases.

Case Overview

In this case study, data were collected from seven LDT scholars; however, after collecting data on all seven cases I removed two cases from the analysis. One case was removed for concerns over confidentiality and one for relevancy (the scholar did not serve as the designer on the selected project). Therefore, the findings below are from five cases, each a practicing instructional designer; four were faculty members at a university, and one was an instructional designer hired to improve instructional outcomes within an organization. Of the four faculty members, two were research track faculty engaged in community-based design projects and two were professional track faculty, working as instructional designers. Each of the cases involved a unique research and design project, or set of projects, that involved negotiating issues of social justice within a specific context (e.g., institutions of higher education, open access online communities, community libraries, indigenous cultural centers). Tensions arose within each project around this negotiating of social justice and, as such, also varied. For example, Case 3 noted the balancing of voices and perspectives as the dominant tension in their project, while Case 2 noted the ways different knowledge systems impacted project goals and understandings. The design practices that participants employed also varied; this was largely due to the fact that those practices were selected in response to the tensions that arose. Such practices ranged from developing cultural competence to centering marginalized perspectives and developing trust between stakeholders. Table 5.4 contains an overview of the projects, contexts, dominant tensions and perspectives of each of the five participants in this study.

Table 5.4

Overview of Cases

Case	Project / Context	Centering Social Justice Goal	Dominant Perspective	Dominant Tensions
1	Designer working with faculty to design courses that aligned with an institutional DEI initiative.	All learning experiences needed to be appropriate and engaging for students from multiple nationalities, ethnicities, languages, and cultures.	Ethical	Roles of the designer and faculty instructors; academic freedom; DEI goals and learning goals.
2	Faculty member engaged in community-based projects that promoted cultural competence across project members and participants.	Preservation and sharing of indigenous knowledge; development of cultural competence across team members	Cultural	Academic expectations and realities of community-based work; multiple knowledge systems; tribal sovereignty and ownership of research data.
3	Designer creating training around trauma-informed care for practitioners and care providers who work with children.	Building belonging and shared understanding; centering marginalized perspectives	Critical	Balancing multiple voices and expertise, including those of both practitioners and researchers.
4	Faculty member engaged in developing and promoting Open Educational Practices (OEP) for higher education professionals	Open participation and access; Co-construction of knowledge from marginalized perspectives	Critical	Marginalized perspectives as key to creating more open and just spaces within academia; maintaining both openness and a justice-focus; constraints and opportunities related to working inside/outside institutions.

5	Faculty member engaged in community-based projects with rural libraries and indigenous communities.	Co-creation of meaningful design products, i.e., community-owned and lead	Cultural	Understanding others how they want to be understood while considering the systemic power dynamics related to voice, agency, stories, and ownership that make the process of understanding complex and dynamic.

Despite the variations across cases, there were commonalities in the ways the participants negotiated issues of social justice. Table 5.5 presents a summary of the common elements that were found across participants. For example, each of the participants described how there was an intentional focus on centering social justice in their project work and during their interactions with project team members. Case #3 described why, in their work, centering social justice meant focusing on marginalized perspectives. During the initial curriculum development, they explained, "we didn't have enough voices with the lived experiences of people of color" (Interview). Therefore, it was important to now balance the "historical perspectives" -- i.e., those who had initially designed the curriculum -- with the new, more diverse, perspectives. Case #4 similarly described their effort to create transformative learning experiences that centered marginalized perspectives without reproducing that marginalization, i.e., power differences. In their case, centering marginalized perspectives meant creating a design team made up of people with traditionally marginalized identities, who worked to center a set of values around care and justice in an online space.

Each of the participants also described how the tensions that arose in their projects led to the selection of specific design practices that were meant to alleviate those

tensions while also attending to the broader goal of centering social justice. Case #5 explained that understanding others was so complex because we tend to approach that understanding from our own cultural frameworks. When these do not align, we are not understanding others "as they want to be understood," which can cause tensions (Interview). Therefore, Case #5 selected design practices that included attending to their own cultural perspectives, learning about their co-designer's cultures and preferences, and creating space and time in the design process for this work to occur. Case #1 described tensions that come from the overlap in the roles of the learning designer and of the faculty instructor, stating there is an "unspoken tension between [the] two sets of academics…and the very notion of how faculty [instructors] perceive people in my role, in my profession" (Interview). In response to these tensions, Case #1 employed practices that created opportunities for the faculty instructor and the learning designer to get to know each other, and the learning opportunities related to the DEI framework, focusing on clear communication and expectations, as well as concrete examples.

Another common component across cases was reflection. Although reflection occurred in all cases, participants working in community contexts (i.e., Cases #2, 4, and 5) discussed their reflection processes in the most detail. In these cases, reflection was a design practice used for community-building, project evaluation, and decision-making. However, reflection was also something designers engaged in individually throughout their projects. Participants described engaging in an iterative reflective process that included the tensions that were emerging around the project, their role in those tensions, and the extent to which the design practices helped address those tensions.

Table 5.5

Common Elements of Negotiating Social Justice Issues Across Participants

Element	Description	Example
Designer – Others – Project Triangle	Project work originated with the designer. The designer worked with others (i.e., community members, stakeholders) to fufill the goals of the project while centering social justice. There was a back-and-forth among these elements as designers worked to understand others' perspectives within the project context, and vice-versa.	*"We're working with tribal elders… to actually help us with a story. When we're training people they come in and also tell the story and help us interpret things. Before we reach out to the community, they go into first and they advocate for us and everything else. So they are part of, sort of part of the whole subject ecosystem"*
Centering Social Justice	Participants were concerned with the ways both their design practices and their design product impacted others in terms of equity, inclusion, accessibility, and agency. The centering of social justice was both a goal and a process.	*"We brought in to our original team of 12…another 10 voices…to get a lot more range of experience…more …people of color, more male voices…more LGBTQ voices, so that we were sure we have a diverse range of perspectives as we planned this curriculum, so that we could make sure it was more accessible to people from these different communities."*
Tensions	Tensions were often brought to the surface as participants sought to center social justice amidst multiple, sometimes conflicting, priorities and goals. These often shifted as project events unfolded.	*"Doing that work requires time. And, and time is of course a finite resource. And in this academic culture… it's not always easy, it's not always desirable to take all this time"* *"But it was one of those situations where we're all using the same words and we didn't realize until we actually put it into practice. Oh, what we mean, this looks different in practice actually."*
Design Practices	Design practices refer to what a designer does throughout the course of a project. These practices emerged in response to the tensions that arose.	*"For DEI goals, I think it is very helpful to have a conversation very early. We come up with…concrete goals…specific things we can do. Like…we can have this interview, or…this discussion, or…this guideline about visuals"* *"We have sessions, where children and grandparents and parents…come together and we*

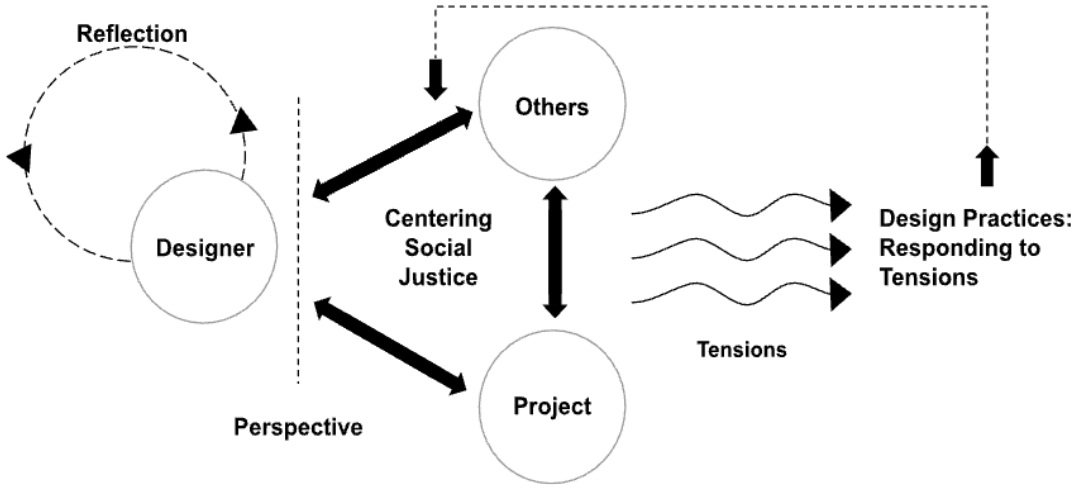
		read a play, together with different roles and we get kids together do minecraft…we have community building sessions, where people can come and just get to know each other but also learn"
Reflection	Reflection was an iterative process in which the designer continuously reflected on the tensions that were emerging around the project, their role in those tensions, and the extent to which the design practices helped address those tensions.	*"Part of it comes from an internal reflection of being able to say -- how do I fit into this picture, what is my contribution to this to this process, what is my contribution to this injustice -- because until you can understand that, it will be very hard for you to be part of the dismantling of that injustice."*

Overarching Question: How Do Designers Negotiate Social Justice Issues?

Figure 5.4 displays the way that the common elements were part of a larger overarching process that participants in this study engaged in when attending to issues of social justice in their work. The process originates with the designer, who is represented in a circle on the left side of the figure. The circle containing the designer is connected with bidirectional arrows to two other entities -- others, who represent the stakeholders and design team members involved in a given project, and the project itself. These circles (i.e., designer, others) not only represent the individual people, but also the various cultural ways of knowing, lived experiences, knowledge, values, and perspectives designers and others brought with them to the project. Likewise, the project circle also represents the contexts where the project is occurring, and, of course, the entire process is occurring within a broader socio-cultural-historical context not pictured in the figure. Below, I explain each of the common elements found in Figure 5.4 and describe how they relate to one another as part of an overall process of negotiating social justice.

Figure 5.4

Process for Negotiating Tensions While Centering Social Justice Issues in LDT Projects



Perspectives

Figure 5.4 displays a vertical dotted line to the right of the designer; that line represents the designer's perspective. This line is included in the figure because each of the three design perspectives identified in the literature review were present in the cases in this study (i.e., ethical, cultural, and critical). While the type of perspective varied across cases, each case exhibited a dominant perspective that informed the way the participant understood the project goals, their design team members and other stakeholders, what it meant to "center social justice," and the tensions that emerged. In the figure, the perspective is presented as a vertical dotted line to reflect the way that each participant's perspective functioned as a lens through which the designer viewed the process of negotiating issues of social justice in their work. For example, participants who had an ethical perspective (Case #1) tended to focus on tensions that impacted their

ability to achieve the project goals, while those with a critical perspective (Cases #3, 4) tended to focus on tensions associated with power dynamics. Those with a cultural perspective (Cases #2, 5) focused more on tensions created by different cultural knowledge systems.

It is important to note, however, that the designer's perspective did not, on its own, determine the project tensions nor the designer's practices in response to these tensions. The designer's understanding of the project continued to develop, influenced by interactions between their perspective, the project context, the act of centering social justice, and others (i.e., team members and stakeholders). The perspective was a lens that provided a way of making sense of these interactions, which continued to change throughout the project as design decisions were made and implemented. To reflect how Perspectives served as a lens, it is represented with a dotted line in Figure 5.4.

For example, Case #5, who took a cultural perspective, described a tension between the importance of understanding someone "as they want to be understood" and the systemic issues of power related to voice, agency, stories, and ownership that make the process of understanding complex and dynamic. Within their project context, then, Case #5 attended to the cultural ways of knowing each team member brought with them and the ways differences, e.g., in lived experience, socio-cultural identities, and academic discipline and/or content knowledge, could limit or otherwise impact understanding between team members. These differences resulted in specific tensions that differed between each project they worked on, however the overall process of identifying and attending to the tensions was always centered in Case #5's cultural perspective.

Centering Social Justice

One common theme among participants had to do with centering issues of social justice as part of negotiating issues of social justice. Centering issues of social justice meant that participants were concerned with the ways both their design practices and their design product impacted others in terms of equity, inclusion, accessibility, and agency. The focus on social justice as part of a process and a product aligns with Bell's (2016) definition of social justice as both a goal and a process. As a goal, social justice is the "full and equitable participation of people from all social identity groups in a society mutually shaped to meet their needs" (p. 3). As a process, social justice is the work needed to attain the goal, done in a way that reflects the goal. In other words, the process of working towards social justice needs to be just itself, i.e., democratic, participatory, respectful, and "affirming of human agency" (Bell, 2016, p. 4).

For the participants in this study, the centering of social justice was both a goal and a process. Many of the participants described how they worked with members of a vulnerable population (e.g., an indigenous community) or group who lacked power over their situation (e.g., librarians; health care providers). The context in which the project took place often required participants to be open, sensitive, and responsive to the needs of both the project and the other members of the project team, including stakeholders and community members. What it meant to "center social justice" therefore varied by participant based on how these needs, contexts, and communities intersected. Figure 5.4 displays the designer, others, and the project as the vertices of a triangular formation in the left half of the process. Centering social justice appears in the center of the triangle to reflect its prominence in the process. The vertices of the triangle are connected by

double-sided arrows to reflect the ways that each of those entities engaged in constant interaction around the centering of social justice.

Tensions

Another common theme was that the specific practices employed by each participant in this study were deeply connected to the context of the project as well as their own values, experience, and perspectives. Every project required the participant to work with others towards a design or project goal. Tensions were often brought to the surface of these projects as participants sought to center social justice amidst multiple, sometimes conflicting, priorities and goals. As contexts shifted and changed and project members increased their interactions with each other, specific tensions emerged -- that is, they often 'bubbled up' to the surface, like waves on the surface of the water.

Case #3 offers an example of the way tensions rose in a project. Case #3 created training materials for health care practitioners. There were many stakeholders involved in the project including subject matter experts, the practitioners themselves, and the cross-system organization responsible for distributing the trainings. Each stakeholder entity brought certain priorities to the table, e.g., the organization was interested in developing broad learning objectives and branding while the subject matter experts (SMEs) were interested in sharing best practices. Tensions emerged when Case #3 added attending to feedback from the anti-racism committee to this list of priorities, in part because some of the SMEs did not believe multiple priorities could be attended to at the same time. This created a conflict between priorities, i.e., a tension. As participants worked on projects with stakeholders in their particular contexts, it became clear to the study participants that they often held differing knowledge, values, and beliefs about what the project was and

how the goals of the project might be achieved in a way that satisfied all parties involved. It was in those differences that tensions not only arose, but each participant needed to identify and implement design practices that they thought would best negotiate the tensions that arose because of those differences.

Design Practices

The tensions that arose became a driving force for the development and implementation of design practices. In this study, design practices refer to what a designer does throughout the course of a project. This includes practices related to the design process (Reiser, 2001) as well as the design team and interpersonal practices (van Leusen, Ottenbreit-Lefwich, & Brush, 2016). Designers typically select and implement practices that align with their own values, goals, and understandings of the project; at the same time, interactions with others impact these values, goals and understandings (Schwier, Campbell, & Kenny, 2004). For example, all the cases that worked with communities outside of academia experienced tensions around differences between the culture of their community and the academic culture. These differences were most salient around issues of ownership and agency, such as who owned research data and who should be involved in the decision-making around data collection and management. Finding ways to address these tensions drove the selection, use, and assessment of design practices. In the example of community/academic cultural tensions, design practices included trust building exercises, employing multiple modes of communication, and centering the culture and needs of the community. Designers then reflected on the impact of these practices on the project goals and tensions.

Figure 5.4 displays the role of design practices in the process of negotiating issues of social justice. The design practices appear as a distinct entity on the right of the figure. Those design practices are visualized such that they emanate from the wavy arrows that represent tensions. There is also a dotted arrow leaving the design practices and returning to the triangle containing the designer, others, and the project. This arrow suggests how the design practices were meant to relieve or address the tensions in a meaningful and productive manner while upholding the overall goal of centering social justice.

Reflection

Across cases, participants engaged in a process of reflection. This process of reflection is displayed in Figure 5.4 as a dotted circle that intersects with the circle containing the designer. The use of a dotted circle is purposeful – it reflects the way that, in this study, the process of reflection was an iterative process in which the designer continuously reflected on the tensions that were emerging around the project and their role in those tensions. The subject of their reflections varied and included their own perspectives, values, and beliefs, as well as the project goals, design team and other stakeholders, and emerging tensions. Case #5 illustrates the reflective process that participants used in this study. Case #5 used reflection to place themselves within a systemic power dynamic, asking "what is my contribution to this process, what is my contribution to this injustice" (Interview). Case #5 reflected on the ways their social position afforded access and power in some instances while restricting this access in others. They considered how they would be perceived by their design partners and other stakeholders, and the ways these partners and stakeholders were themselves positioned in relation to access and power. Reflecting on the way these tensions played out in their

particular projects was critical to identifying design practices that addressed these tensions, such as working closely with cultural insiders and knowing when to "pass the mic".

The goal of the reflective process was largely to select and employ practices that addressed the tensions while also monitoring whether those practices were successful at centering social justice. As part of the reflection process, the participants applied their design knowledge, experience, and their understanding of the context to employ practices that would help achieve the project goals while centering social justice in a way that reduced any tensions that emerged. For example, Case #2 attended to tensions around valuing indigenous knowledge systems (IKS) in a context that traditionally devalues such systems. In their project, they provided tools to indigenous youth to support the capturing and retelling of culturally based stories. Case #2 described reflecting on these tools by asking, "How is that shaping their experience? How is that affording them or constraining them… to tell stories and communicate their experiences with the world?" (Public Document). In particular, they were interested in the ways the tools supported indigenous youth to create story structures in line with IKS. Observing and then reflecting on the ways the youths took up these tools provided important insight on ways to better align the tools with IKS, e.g., supporting non-linear story structures. Reflection was not a one-time task, but rather integrated in an ongoing fashion into the design process.

Negotiating Issues of Social Justice: Examples

The processes of research and design involve a lot of problem-solving and decision-making -- providing many opportunities for values, beliefs, and understandings to come into conflict. However, for this study I was not interested in tensions and conflict

in general but in those that emerged while scholars worked to center justice and equity in their research and design. These tensions indicated spaces where a difference in values, beliefs, or understandings mattered in terms of justice and equity. During analysis, I identified two groups of cases with similar driving tensions -- faculty doing community-based work and scholars hired as instructional designers working with faculty instructors and practitioners. For each of these sets of cases, I provide a figure situating the common components of centering social justice in the context of one of the cases (See Figure 5.5 for Case #2 and Figure 5.6 for Case #1). One case did not fit into these groupings: a scholar who worked as an instructional designer but did much of their justice-based work outside of their institution.

Faculty Doing Community-based Work

Perspectives. Two cases (#2 and #5) were faculty members in the US who engaged in research and design projects with both local and global communities. These cases approached their work from a cultural perspective. In particular, Case #2 approached their work using insights from San Pedro's (2018) culturally-disruptive pedagogy, focusing on exposing and addressing tensions related to privilege and cultural ways of knowing throughout the research and design process. In Case #2's work, indigenous and non-indigenous design partners worked together to identify how their cultures impacted the ways they constructed understandings of the project, themselves, each other, and learning and design. Centering social justice for Case #2 involved the preservation and sharing of indigenous cultural knowledge, in ways that respected that knowledge. Figure 5.5 displays the common components involved in centering social justice situated in the context of Case #2.

Centering social justice for Case #5 meant that the community(ies) they worked with truly owned the design. In other words, they wanted to co-create designs that were both meaningful to the community and responsive to their needs. This required a focus on developing an understanding of their design partners "the way they wanted to be understood" (Case #5, interview). This understanding involved learning about design partners' cultures, perspectives, and lived experiences, as well as recognizing the systemic issues with voice and participation for marginalized communities. For both cases, understanding required continually reflecting on how one's own culture, perspectives, and lived experiences are situated within a power dynamic that impacts the way one understands others. For example, Case #5 explained, "most of our understanding…comes through our own cultural prisms" (Interview). They described how ideas and beliefs become internalized, and often remain unquestioned until "you speak to other people who are not from the same space" who provide a different perspective that reveals those internalized beliefs (Interview). Both cases, then, recognized the importance of the intersection of cultural ways of knowing in their projects, and the process by which, through understanding another person's culture, we come face-to-face with our own assumptions, beliefs, and values.

Tensions. The dominant tension for these two cases was that their institutional cultures did not always align with their community-based research and design work. In particular, tensions emerged between the norms, values, and expectations of western academic culture and those of community-based work. Western academic culture tends to value efficiency and productivity, measured in terms of research grants and peer-reviewed publications. On the other hand, both Case #2 and #5 explained that

community-based work takes a lot of time, and reciprocity is highly valued. Reciprocity requires that the design process, product, and other outcomes support the goals and needs of both partners; this is often not achieved by academic publications alone. For example, Case #5 explained that their community partners were not interested in academic publications but were very interested in producing informational products for their libraries. Similarly, Case #2 described that much of the time spent with their partners, an indigenous tribe, was spent on developing relationships and working on things that were meaningful in that moment, *not on* collecting data for research and publications. Time spent working on what community partners value is critical to the practice of community-based work but can be viewed as inefficient in terms of an academic culture.

Similarly, both cases dealt with tensions between academic and community beliefs around knowledge production and ownership. In general, the processes of creating knowledge through co-design and research did not align with the processes of knowledge production in the cases' institutions. For example, Institutional Review Boards make clear distinctions between the roles of researcher and participant and require training for researchers that is usually only available to members of the institution (i.e., not community members). The role of this trained researcher, from the perspective of the IRB, is to bring their knowledge into a community. The researcher is the expert who comes from the university; the community receives knowledge and assistance. However, in community-based work, the distinctions between researcher and participant, and between designer and target audience, are often less clear. Case #2 explained in their project there were not clear distinctions between the community -- an indigenous tribe -- and the academic institution nor between researchers and participants. Tribal members,

some of whom were also graduate students, chose how and when they wanted to participate, and this participation changed over time.

Goals and Practices. In response to the tensions between institutional and community cultures, a key practice for Cases #2 and #5 involved centering their community partners. They focused on fitting community-based work into the academic culture, rather than centering academic values in their work. For example, Case #2 worked with their institution's IRB to create an official IRB pathway that acknowledged the sovereignty of tribal members and allowed for members to be both researchers and participants. Both Case #2 and #5 also reflected on their own academic productivity; they explained that writing about the process of their work was just as meaningful as writing about an end result. A focus on process allowed the scholars to produce academically-valued work without rushing or controlling the community-based co-design process.

Related to centering community partners, Cases #2 and #5 also focused on building and maintaining relationships with their partners. Building and maintaining these relationships created a sense of trust between the scholars and project team members, allowing for more information to be shared and a deeper understanding of the team members' needs and goals. Building and maintaining relationships involved multiple practices, such as: including design partners in every step of the process from planning, decision-making, and creative aspects of design, to evaluation and assessment (e.g., using a Design Based Research method). For example….. Scholars also directly asked stakeholders to identify their needs and goals and designed in iterative cycles to attend to these needs and goals. Finally, scholars provided multiple ways to engage in

communication and sharing, e.g., across different modalities and platforms, and created space for whole-group and individual reflection.

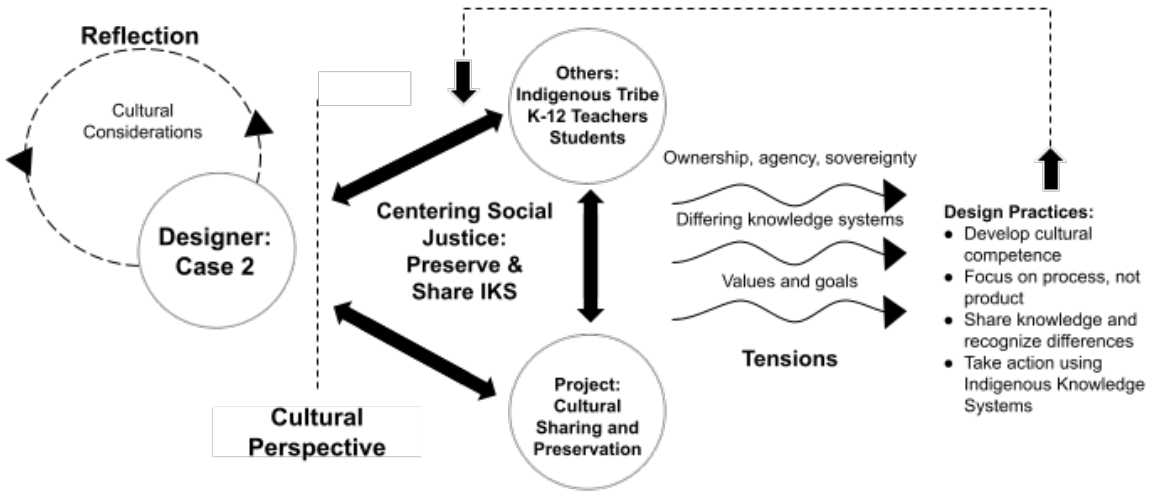
Building and maintaining relationships also included the development of cultural competence, particularly for Case #2. Cultural competence meant all team members -- indigenous and non-indigenous -- explicitly discussed the ways culture impacted their understandings of the project. This team also explicitly discussed the intersections of power and culture, e.g., the impact of the dominant, white, western culture on knowledge construction. Additionally, indigenous team members were described as "cultural knowledge bearers," and were held in a place of privilege on the team. Privileging indigenous knowledge systems (IKS) also meant ensuring both elders and youths were involved in the project because intergenerational learning is a key component of IKS. Finally, Case #2 included time for debriefing and reflection with all team members on whether the project's goals and vision were being met, including the goal of cultural competence. Practices related to cultural competence are not able to be separated from the process of building and maintaining relationships because the trust that came from relationship-building was required to engage in the practices meant to develop cultural competence (Interview).

Case #5 aimed to leverage their understanding and relationships to co-create meaningful designs, i.e., designs that were owned and accepted by the community or target audience. Case #5 described examples in which designers approach the community with good intentions, but ultimately do not involve the community in ways that allowed the members to take ownership of the project. In order to attend to this issue, some of the design practices they engaged in included relying on a cultural insider to provide insight

into the hierarchies/power dynamics, language, and other culturally-relevant considerations for the design team and listening to others. Listening to others meant not assuming you knew about their culture just because you may have studied it previously or worked with others from a similar culture. Listening to others also meant hearing them "in their own voices," which required attending to the expertise and knowledge of each design team member. For example, when a project was not gaining traction with a certain population (in this case, a community library) the design team went to their advisory board to gain the perspective of that population and made changes to the design to accommodate their new understandings.

Figure 5.5

Negotiating Tensions While Centering Social Justice Issues in Case #2



Instructional Designers in Higher Education

Three cases (#1, #3, and #4) were instructional designers working in a higher education institution. As discussed, Case #4 believed the type of project they wanted to

create needed to exist outside the confines of their institution; this case is discussed in the next section. On the other hand, Cases #1 and #3 worked on justice-related projects within their institutions. Case #1 worked directly with faculty instructors while Case #3 created training materials for health care practitioners. Both cases were tasked with improving courses and content in ways that were aligned with their institutional or organizational diversity, equity, and inclusion (DEI) goals. Because of this, their cases have some overlap. In particular, the dominant tension in their cases were similar, related to the differing roles of instructional designer and faculty instructor. However, the perspectives each designer approached their work with were different. Below I first discuss the design perspective of Case #1 and #3 separately; I then discuss their overlapping tensions and practices.

Perspectives. Case #1 took an ethical perspective in their design work, rooted in their previous experiences as a learner as well as their design expertise. An ethical perspective focuses on the moral and legal responsibilities of the designer and the impact of the design. Case #1 used a DEI framework developed by their department and supported by their provost to engage in course design with faculty instructors. Aligning courses with the DEI framework represented an institutional responsibility. Case #1 also brought their knowledge and expertise to this work, focusing on the impact of the design on learners. As a learner, they were made to feel comfortable and confident through DEI-related considerations. An ethical perspective prompted them to create similarly meaningful experiences for all learners. Centering social justice for Case #1 therefore involved persuading the faculty they worked with to incorporate aspects of the DEI

framework into their course design. Figure 5.6 displays the common components related to centering social justice situated in the context of Case #1.

Case #3 took a critical perspective in their design work; in particular, an intersectional perspective. Intersectionality is a theory that comes from the legal field and describes the ways various social identities are systemically positioned to have access or barriers to resources and privileges, and the ways various identities intersect and overlap in context (Crenshaw, 2018). I describe Case #3's design perspective as intersectional because of the ways they engaged with marginalized perspectives and positioned themselves, their design teams, and their learners within broader socio-cultural-historical systems. For example, Case #3 stated that "as a white woman, I don't feel like I should be the defining voice on what moves forward" (Interview). For them, centering social justice meant " hav[ing] people from marginalized and underserved communities…identify what needs to be amplified and then us[ing] my voice to amplify" (Interview). Case #3's understandings of intersectionality revealed potential blind spots in the project team's lived experiences, and lead to the development of an anti-racism committee to address these blind spots.

Tensions. For both Cases #1 and #3, tensions emerged around the differing roles of instructional designer and faculty instructor/practitioner. One aspect of the tension was rooted in the faculty instructor or practitioner's (mis)understanding of the role of an instructional designer. Case #1 and #3 explained that faculty often were not familiar with the field of instructional design and did not know what expertise designers brought to a project. Case #1 and #3 understood the faculty practitioners as subject matter experts (SMEs), however the faculty practitioners did not have a framework of understanding

within which to place the instructional designers' expertise and role. For Case #3, this resulted in a lack of clear delineation of roles and decision-making power on their design team.

For Case #1, power dynamics heightened the tension between the roles. In this case, the role of the designer was perceived as in tension with the culture of academic freedom, and therefore, the role of the faculty instructor. Case #1 offered design support within a DEI framework. However, not all faculty believed equity and inclusion related to their learning objectives. Although most faculty were willing to make adjustments to their courses based on the framework, others pushed back and, ultimately, refused. In this example, the faculty instructor positioned themselves in authority and the designer in a support staff position, whose opinions carried less weight, rather than seeing the designer as simply having a different area of expertise.

For Case #3, tensions emerged when the project team's newly-formed anti-racism committee reviewed the design (training curriculum) to identify areas for improvement. Areas identified included strategies that were not aligned with cultural norms of certain marginalized communities and case studies missing important socio-cultural contextual details. Because the original design had not centered multiple perspectives, including those of marginalized populations, the design team then had to figure out how to incorporate these "new" perspectives within the existing curriculum. Similarly to Case #1, this required more than simply making changes to existing designs. It required negotiating between different approaches to design, multiple areas of expertise (e.g., cultural, design, content-area), and the people behind these designs and expertise.

Goals and Practices. To address the tensions around the differing roles of faculty instructor or practitioner and designer, Cases #1 and #3 shared the goal of building understanding. For Case #1, this meant getting the faculty to understand where they could make DEI related changes in their courses. Case #1 wanted to persuade faculty to engage with the DEI framework and to support them in implementing the framework in their courses. To accomplish this, Case #1 explained making the framework concrete was critical. DEI concepts are often presented very broadly, and it is a challenge to implement broad, abstract concepts into course design. Case #1 provided examples of design artifacts from other courses, created tables aligning the framework to specific actions and resources, and kept in regular communication with their faculty instructors. Additionally, once the design was created, the communication and design process were not over. Case #1 described an iterative approach where assessment was a key component. They began with a "gut check" of the design and moved to collecting and analyzing student and instructor feedback. This feedback was assessed by considering the initial intentions behind design choices and the ways students and faculty engaged with these choices.

For Case #3 building understanding was a multi-directional process, ideally resulting in a shared understanding across team members. Case #3 explained that a shared understanding "is a theoretical space that allows you to decision-make together as a collaborative group" (Interview). In other words, a shared understanding was not the same as coming to a consensus, but rather represented a collective acknowledgement of the various perspectives on project goals and priorities that informed the decision making process. The project Case #3 worked on had undergone several revisions, with different people involved at different times with varying degrees of engagement. In this context,

building a shared understanding was critical, but also difficult. Case #3 employed a number of design practices to address this tension including using digital tools (e.g., Google Document's comment feature) that allowed for collaborative knowledge building, creating summaries of the project to re-orient team members at the beginning of meetings, and designing messages in a way that clearly demarcated important design choices. The design itself also incorporated many digital tools to support the development of a shared understanding.

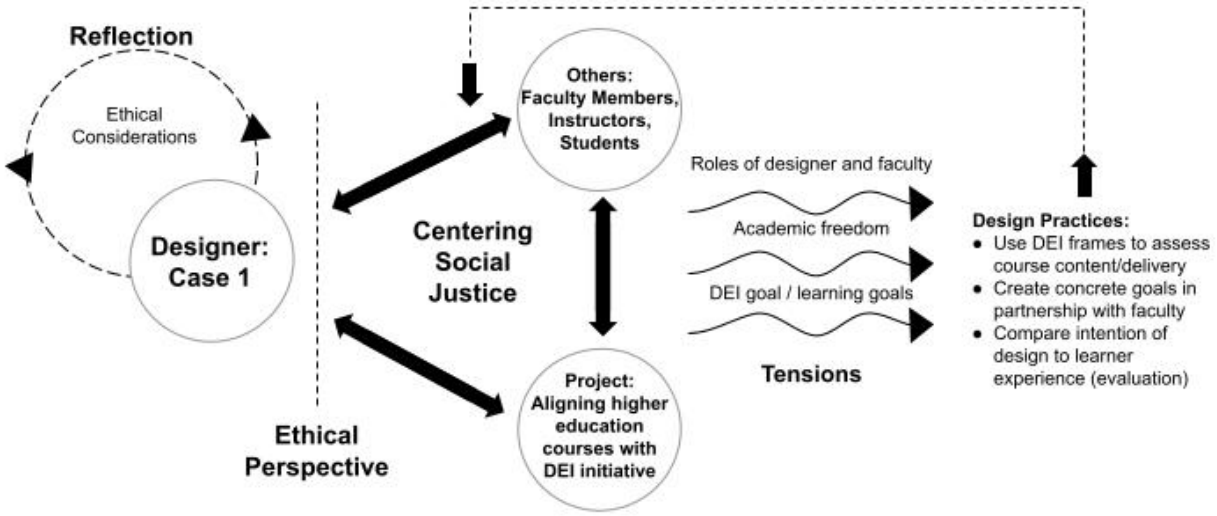
Case #1 and #3 each centered social justice in ways that related to their perspectives. For example, coming from an ethical perspective, Case #1 wanted to create a positive experience for all learners in the courses they designed. Specific practices that supported this goal involved including multiple perspectives (e.g., through readings, discussions, guest speakers, and debates) and culturally-relevant examples and resources, as well as creating guidelines for script and video creation. For example, Case #1 stated faculty instructors making videos for their courses were instructed to not include shots where signifiers of power were visible, e.g., expensive artwork or framed degrees. The purpose of this guideline was to make students more comfortable, and the power dynamic between instructor and student less pronounced.

In line with her intersectional perspective, Case #3 worked to center marginalized perspectives. Some of the practices Case #3 used to achieve this goal included helping create an anti-racism committee and developing a process by which the committee reviewed certain design decisions and content. They also adapted materials to be more culturally-relevant by including examples and strategies for multiple cultural contexts. Case #3 recognized where they had power versus where they had knowledge and lived

experience and reconciled the gap by leveraging the voices of the anti-racism committee. The perspectives of the anti-racism committee ultimately improved the design, making it culturally-relevant for more users.

Figure 5.6

Negotiating Tensions While Centering Social Justice Issues in Case #1



Outlier Case / Case 4: Building an Open Educational Community Online

Case #4 worked as a faculty instructional designer at a university in northeastern Africa. In this role, they provided faculty development workshops, supported the development of online courses and programs, created and implemented assessments, and served on various university committees. Unlike the other cases in this study, the project for Case #4 takes place mostly outside of their institutional context, although they do share this work with their institutional colleagues. Case #4 began this project by offering a course for undergraduates within their institution focused on developing cross-cultural competence. This initial course grew into something much larger. It is now a global, open

educational community that offers webinars, Open Educational Resources (OERs), and hosts events online. Most of the participants in the community are higher education professionals, however, anyone with an interest in teaching and learning is welcome to join.

Perspectives. Case #5's design perspective is critical and focused on relationships, care, and agency. They take an intersectional perspective, recognizing the ways social, political, and national identities shape our ways of knowing. In particular, Case #5 invited women of color, women from the "global south," people of color, and anyone from the "margins" to become the center of their online community. They used an approach called Intentionally Equitable Hospitality (IEH), initially developed as a facilitation praxis for hybrid professional development (Bali & Zamora, 2022). Bali et al. (2019) described this approach as "intentional about every step in the process," as equitable through "challeng[ing] power structures that contribute to unfair access and opportunities" and as engaging in a hospitality that "question[s] its own values and how this works in practice within power structures (Bali et al., 2019, para. 4). In other words, by critically engaging with care-based perspectives, IEH provides a way to embrace both care and equity.

For Case #4, centering social justice involved creating spaces that were open, accessible, and "designed from the margins" (Interview). Designing from the margins is an intersectional approach to design that recognizes the ways historically marginalized people are situated within socio-cultural-historical systems, resulting in lived experiences that provide insight into the multitude of ways oppression operates within these systems. This insight has the potential to inform designs in ways that create transformative

learning experiences. In this case, the online community was designed to use technology not only to promote connectivity and interactivity, but also transformative learning experiences.

Tensions. As much as openness, accessibility, and participation were goals for this case, they were also spaces where tensions emerged. Tensions emerged as designers and participants together responded to questions around who these spaces were open and accessible to, and what participation looked like. For example, during the planning of one of the community's online events, participants were invited to propose their own sessions. If accepted, participants would become the leader of their session. However, because the call was open to anyone, it was nearly impossible for the design team to ensure these sessions would be enacted with an IEH perspective. Therefore, openness and participation became in tension with the intentional creation of a critical care space.

Goals and Practices. Responding to tensions around openness, accessibility, and participation required the design team to engage in practices that (1) expanded notions of openness and accessibility while also (2) developing an IEH ethos among both designers and participants. Practices that expanded notions of openness and accessibility included: lowering financial and other barriers to participation, attending to time differences and linguistic diversity by varying the modes and types of offerings, offering adaptations for all resources (e.g., cultural considerations), using technologies that support the social construction of knowledge, and creating reflective spaces to gather feedback and insight into the participant experience. Practices that developed an IEH ethos among designers and participants involved work on both the individual level, e.g., reflecting on and excavating assumptions, as well as on the group level, e.g., creating structures and

processes in the design to provide both care and criticality. Case #4 described a starling murmuration as a metaphor for how an intentional approach to care was scaled in their online community. In a murmuration, each bird is aware of what the 7 birds closest to them are doing. In practice, Case #4 and their 2 co-designers each took 3-4 leaders in the community to be responsible for/with. Additional practices included: community and trust building sessions, gratitude journaling and discussions around well-being, and on-going discussions supported by multiple platforms in addition to regular meetings to create a shared context for decision-making.

Discussion

In this study, we highlighted five cases in which designers were challenged with negotiating issues of social justice as part of their professional practice. Across each of the cases, the designers described how they sought to center social justice in their work. The concept of centering social justice is somewhat new in our field; a number of examples from the literature highlight the qualities of social justice curriculum and activities (e.g., Hatley et al., 2017; Horton, Byker, & Heggart, 2017; Ikeda et al., 2021; Söken & Nygreen, 2021). What is less prevalent in the literature is discussion of what the concept is or how it can be defined and practiced by designers (Moore, 2021). This study adds to the literature, then, in that the findings suggest how the phrase, *centering social justice*, is more than a set of qualities or principles associated with lesson or activity design. In this study, *centering social justice* represented a relational, dynamic concept in which our participants sought to recognize and, if possible, take action on deeply rooted injustices in society as part of their project work. This finding adds strength to Moore's (2021) position, in which she advocated for an ethical approach to design in our field by

moving away from a reliance on prescriptive models of design towards more critical, responsive approaches. The way that our participants centered social justice reflects Moore's position in practice. Their practice was not model-driven or prescriptive; rather, it was responsive to the relational components of the design process and the way those relationships emerged and affected project outcomes over time.

The dynamic nature of *centering social justice* can also be seen in the way that it served as *both* a goal and a process in this study. In each case, the designer noted how they wanted both their design practices and their design product to address or improve issues of equity, inclusion, accessibility, and agency in some manner. The way this goal played on in practice, however, was varied. In some cases, it led designers to employ group-building techniques that centered the culture and needs of the community (Cases #2 and 4), whereas in other cases it led to the incorporation of specific frameworks and principles that aligned with diversity, equity, and inclusion (Case #1). Regardless of the specific approach or practice, the common theme that emerged was that the *process* of centering of social justice was largely responsive to the context of the project and the ongoing needs of the people involved. This brings additional insight to the work of Moore (2021) and others (Asino, Giacumo, & Chen, 2017; Campbell et al., 2009) who advocate for designers to take a more reflexive approach to design -- that is, to question oneself and one's position within a design project so that the process is more equitable and fair for all involved. In particular, the current study suggests how a designer who is negotiating issues of social justice may need to revisit repeatedly what social justice means in a given context (i.e., as a goal) to themselves and others (e.g., Cases #2, 4, and 5), if it needs to be addressed (e.g., Cases #1 and 3), and how it can be achieved in their

project through their interactions with other team members as a process (All cases noted this). Approaching the centering of social justice as both a goal and a process, then, means that the designer must be open and flexible to the ways that issues of social justice change and emerge as project activity unfolds.

Perspectives

Another important finding was that the centering of social justice, as both a goal and a process, was often driven by the designer's perspective (e.g., ethical, cultural, critical). That perspective impacted the designer's understanding of their own roles and responsibilities in the project as well as their understanding of others. For example, Case #1 took an ethical perspective, which assumes professionals in LDT have a responsibility to use their expertise to benefit individuals and society at large (e.g., AECT 2018). For Case #1, then, centering social justice meant taking responsibility for both the design and the learners' experience with that design. On the other hand, Case #2 took a cultural perspective. Unlike Case #1, Case #2 did not see justice as tied mainly to the design or the experience of the learner within that design, but rather as rooted in the process of understanding and centering the culture of their co-designers and learners. This perspective is in line with work by Asino, Giacumo, and Chen (2017) that called for an engagement in a process of design that is, itself, "culturally aware," as well the creation of culturally relevant designs (p. 5876). For Case #2, centering social justice meant taking a "culturally aware" approach to the co-design process.

These examples show two very different ways of conceptualizing what it means to center social justice in professional design practice. Although there is contrast between the examples, it is important to remember that neither example is "right" or "wrong."

Rather, each represents ***one*** way social justice could be viewed and, in turn, enacted within a particular context and by a particular designer. What is more important is how the designers in this study sought to align their practices with their perspectives, and in a way that centered social justice. This balancing act between the designer, the designer's perspective, and the centering of social justice is consistent with previous research. For example, Campbell, Schwier, & Kenny's (2009) agentic model of instructional design suggests that designers experience multiple forms of agency -- from interpersonal to professional and even societal. Based on interviews with six designers, the authors found that a designer's use of these forms of agency was varied and depended on the way a given form aligned with their own personal values and the constraints within a given context. Studies conducted by Boling and others have also focused on designer judgements, finding that the ways designers make decisions are informed by not only their expertise but also their morals, values, and beliefs about design (e.g., Boling et al., 2017; Gray & Boling, 2016; Gray et al., 2015). In each of these studies, the designers brought their expertise and perspectives into conversation with others as well as with the project's goals, context, and constraints so that their practice aligned with both their own values and the values of others. In the current study, a similar dynamic unfolded. Each designer described how their dominant perspective helped them achieve a balance between their values and the centering social justice as both a goal and a design process.

Tensions

The results of this study also suggest how centering social justice as both a goal and process often led to tensions among team members. Tensions often emerged when there were perceived differences about whether social justice even needed to be centered

and what it meant as a goal; this was often rooted in differences among how team members viewed the project, how they understood the issues of social justice at hand, and how the values of the cultural and/or institutional context impacted their work. This was particularly evident in Cases #2 and 5, where the cultural values of the community were often at odds with the values of the academic institution. In both cases, team members who were from marginalized communities held a different perspective than the institution about what was needed to support or promote social justice.

Tensions also emerged as the centering of social justice played out as a process. Because the nature of social justice is to create change, it is natural for design work that centers social justice to lead to tensions (Bradshaw, 2018b). Institutions and systems are often designed without inclusion, equity, and justice in mind; as those institutions and systems come into contact with individuals who have been marginalized or treated unjustly in some way, the likelihood of conflict increases. This was evident in Case #4, where the designer decided to create their own space to support academics with marginalized identities rather than work within their institution to create this space. In practice they found that the priorities of the institution (e.g., consistent and uniform trainings) did not align with the responsive, case-based, open-resource approach the design team determined was necessary in this context.

Emerging tensions created a need, as well as an opportunity, to respond with design practices. In several cases, those tensions were neither good nor bad. Rather, they were an opportunity to better understand what differences mattered among the team members and why. This understanding was essential in selecting design practices. As Campbell, Schwier, & Kenny (2009) found in their study of instructional designers in

higher education, participants in the current study were "acutely aware of when their values and the values of clients, the profession, and institutions were aligned or in conflict, and this awareness had a strong influence on their practice and attitudes" (p. 649). That awareness had a profound influence on the design practices that were enacted by the participants in this study. Overall, their awareness of tensions prompted the selection of design practices that were meant to assuage these tensions while still centering social justice. At the same time, those tensions emerged from the act of centering social justice; removing this centering would, in theory, remove the tension. However, that was not an option for these designers because the goal of centering social justice was central to each of their projects. Therefore, their design practices needed to attend to the tension in a way that did not dilute the social justice goal but did address the conflict and allowed the project to move forward.

For example, Case #1 was aware of the tensions between the role of faculty instructors and learning designers around issues of academic freedom and expertise. Case #1 expected, and saw, such tensions rise to the surface around the implementation of a DEI framework. They wanted to persuade faculty to take up at least some parts of the DEI framework but also had to consider the tensions, i.e., the ways faculty might perceive the role of the learning designer, the framework, and what these meant regarding control over their course content. Therefore, the practices Case #1 engaged in – e.g., providing concrete, relevant examples of abstract DEI principles, regular communication, and prepping faculty for the DEI-focus within the course proposal form – were sensitive to the underlying tensions in a way that supported their social justice goals.

Power Dynamics

The results of this study suggest that not only should tensions be expected while centering social justice, but also that issues around power dynamics are particularly likely to contribute to these tensions. Social justice means equitable access to resources and opportunities; however, as individuals work towards this goal they do so in contexts that do not always reflect this equitable access (Bell, 2016). Additionally, individuals are all uniquely positioned within social, cultural, economic, and political power dynamics (Crenshaw, 2018). As seen in this study, this positioning impacted participant's and their team member's lived experiences, and therefore the ways they understood the project, each other, and what centering social justice meant. Several participants (Cases #2, 4, 5) worked with members of marginalized communities that they themselves were not part of on projects meant to benefit these communities. This brought forward tensions around the inequitable power between dominant and non-dominant cultures, e.g., between institutions of higher education and indigenous tribes, as well as tensions around issues of agency, understanding, and ownership.

The role of power dynamics in this study brings insight into an issue that has been noted by Giacumo and colleagues (Giacumo et al., 2021; Peters & Giacumo, 2020) work -- namely, that negotiating unequal power dynamics are a common aspect of instructional design, yet our field has only begun to understand how instructional designers deal with those dynamics in practice. In this study, the power dynamics present in all cases were experienced intersectionally by both participants and their team members. In other words, the participants in this study were members of higher educational institutions with access

to various resources and privilege; at the same time, they also held multiple socio-cultural identities that provided or restricted access to resources and privilege in their day-to-day lives depending on the context (e.g., Schwier, Campbell, & Kenny, 2004). This intersectionality suggests how negotiating power dynamics is complex for a designer. Several scholars have suggested that negotiating those dynamics is a matter of having the designer recognize their professional moral responsibilities and to make an effort to address this responsibility through their practice (e.g., Gray & Boling, 2016). Rather, this study suggests that negotiating power dynamics means going beyond one's addressing privilege as a designer. It is about understanding the power dynamics present in a project, their impact on the project and team members, the team member's own understandings of these dynamics, and which parts of the dynamic were salient at a given moment. Designers in our study used these understandings to attend to the tensions around power dynamics through their design practices.

For example, Case #1 approached tensions around power dynamics by attending to the intersectional nature of power in their project, not only between themselves and the faculty member as addressed above, but also between the faculty member and their students. They encouraged faculty members to include multiple perspectives in their courses, by adding readings and resources and engaging students in instructional strategies such as debates and guest speakers with views opposing that of the faculty member. Multiple perspectives provided students multiple points of entry to a topic, rather than a single one determined by the faculty instructor. Another approach was to intentionally bring power dynamics to the forefront and address them together as a group. Both Cases #2 and #4 engaged in practices that supported explicit conversations around

power including the co-creation of group norms, regular meetings and communication, utilizing multiple modes for communication to involve as many people as possible – across time zones and to address issues of connectivity/accessibility. Case #2 also engaged in cultural competence training for all project members, while Case #4 intentionally recruited scholars from marginalized communities to lead design decisions.

Implications

The results of this study suggest that the *how* of negotiating issues of social justice has some commonalities across contexts and participants. Although each case in this study differed in the way they centered issues of social justice and experienced tensions from that centering, there was a common process visible across cases. That process was responsive to ongoing changes in context, people, and the awareness of tensions. Ultimately it is a mixture of perspectives, knowledge of practices, and a designer's own ability to see themselves in relation to others who may come from different backgrounds that support a designer in centering social justice in their professional practice.

The most immediate implication is that designers who are negotiating social justice in their work develop an approach in which the implementation of design practices is responsive to the situational and cultural considerations and tensions that emerge in a given context. This responsive approach to instructional design is present (e.g., Bali & Zamora, 2022; Thomas et al., 2002; Stefaniak et al., 2022) but uncommon in the literature. More commonly, the field of LDT tends to approach design practices as something that can be isolated and shared across contexts. This gives the impression that engaging in particular design practices will result in effective design (and, therefore, effective learning) across contexts. For example, Chandler et al. (2021) identified five

common themes related to social justice goals across 30 MOOCs. They then extracted the design practices related to these themes, referring to the practices as the "common instantiations of DEI goals" (p. 7). These instantiations, or broad design practices, certainly could support the centering of social justice, however, the findings from this study suggest that the approach of extracting practices across contexts may be less useful. Rather, it may be that the designers' thinking behind the practice – their consideration of the dynamic interplay between the tensions and their understanding of the centering of social justice – is what renders the practices they choose effective in their context. This suggests that it is important for designers who are negotiating issues of social justice to learn to go beyond models so that they can anticipate how specific design practices may or may not help center social justice and address tensions in their work.

Another implication from this study is the importance of reflection as designers negotiate issues of social justice. In particular, participants tended to reflect on not only the design product and process, but also on their relationships with others, their understandings of social and cultural considerations, and their own role and perspectives. This type of reflection required a set of understandings around the impact of their role as a designer and researcher on the project (i.e., reflexivity), their socio-cultural position in relation to others (i.e., positionality), their lived experiences and culture, and the relevance and/or impact of these on the project and the project team (i.e., intersectionality), and an awareness of both current and historical power dynamics and the ways these might impact the project and team. This set of understandings expands what is included in the design process -- from the psychology of instruction typically

focused on in ID models to learning to situate ourselves and others within socio-cultural contexts.

Another implication of this study is that designers need to develop awareness of current and historical power dynamics and how they impact a project and team relationships. For example, when Case #2 recognized tensions around beliefs and values related to knowledge production between themselves, their institution, and their design partners, an indigenous tribe, they decided to make changes to the institution rather than demand concessions from the tribe. This decision involved an understanding of the current and historic oppression of indigenous peoples by primarily white research institutions, and a desire to change this power dynamic. It involved understanding Case #2's positionality, i.e., their role and power as a tenured faculty member within a primarily white institution -- and the ways this role could be leveraged to uphold or upend the status quo. This decision also considered the reciprocal relationships Case #2 had built with the project team, the indigenous community, and the cultural understandings, trust, and values they built together. In this case, then, iteratively engaging in reflection on power, positionality, justice, and culture ultimately supported the implementation of design practices that advocated for tribal sovereignty and indigenous knowledge systems, i.e., centered social justice in the design process.

However, for those new to social justice work, identifying tensions and their underlying causes may be a challenge. Even though a number of models related to designing for social justice have been proposed in our field (e.g., Heggart et al. 2020; Young, 2008a), those models tend to focus on what social justice could look like in learning design rather than on the differences in the ways people might approach such

goals in practice. This has become increasingly concerning in our field because the spaces where we do our work were not designed to support social justice goals (Bradshaw, 2018b). Likewise, our practices don't directly address how designers can negotiate the centering of social justice amongst diverse team members (Giacumo et al., 2021; Moore, 2021) Therefore, tensions may be perceived as failures instead of an expected component in the process of designing around social justice issues. This study revealed the ways designers with experience negotiating such issues treated tensions as opportunities to refine goals, to make underlying understandings explicit, and to better understand the complexities of their projects.

Finally, the results of this study suggest, in line with a growing body of literature, that we should focus more on the 'why' behind a designer's use of design practices (e.g., Gray & Boling, 2016; Moore 2014; Stefaniak et al., 2022). This aligns with Gray et al.'s (2015) position that design expertise requires designers to be transparent about how design decisions and practices are situated within broader contexts that the designers themselves are both part of and shape. Our study adds to this perspective, suggesting that designers are socio-culturally-historically situated persons, with various identities and experiences that inform their ways of knowing, their lived experiences, and, therefore, their design practices. While they may be experts in instructional design, they also must acknowledge that they may lack perspective or expertise in the ways that other people know and experience the world. This means that being transparent entails more than explaining a decision; it requires a designer to acknowledge the way that other perspectives were considered when making decisions and the potential tensions that might arise from those decisions in a given context. This type of transparency can be seen

in DeLorme's (2018) decolonizing approach to instructional design, which promotes a reciprocal process in which the designer's own perspectives and ways of knowing are present and accounted for. Similarly, Romeo-Hall et al.'s (2018) use of the theory of intersectionality and feminist perspectives to move the field more towards "a process-based, relational, inclusive, equitable, and transformative community" (p. 23). Connecting both DeLorme's (2018) and Romero-Hall et al.'s (2018) work is the idea that a designer's socio-cultural identity and ways of knowing impact the way they approach design. This may be particularly true for design that attempts to center issues of social justice, as our relational identities impact the ways we experience and understand issues of power, privilege, and oppression of self and other.

Limitations

One limitation of this research relates to selecting a single, dominant perspective each participant used to frame their work. Describing participant's perspectives as ethical, cultural, or critical is somewhat limiting, as in practice these perspectives overlap. Additionally, I asked participants to describe their work within a particular project, and therefore it is uncertain that their perspectives would be the same in a new project context with different constraints. It is likely designers do not engage with one dominant perspective across their projects, although more research on this would be needed to make any claims around this issue.

Another limitation is that all the projects described in this study were successful, at least from the perspective of the designer. Participants all described tensions that emerged during their work, but these tensions were attended to with design practices that both supported social justice goals and alleviated the tension. However, in my experience

as a community organizer I saw projects fail when team members were unable to address differences in understandings or goals. I believe design projects likewise have the potential to fail if tensions are not properly addressed (where properly means that the tension is attended to without losing the focus on social justice). There is much more to learn about the process of negotiating issues of social justice in design research and practice, and future research should include examples of both successes and failures, as well as include the perspective of other team members and stakeholders. Tensions assumed differences but may have been miscommunications, highlighting the need to engage with both the designers and the co-designers/stakeholders to understand whether the social justice goals were met from more than one perspective. This will require valuing vulnerability and openness on the part of designers that is not often seen in our current literature.

Additionally, although the cases were diverse in terms of race and gender, the specific ways these social identities impacted the cases were not discussed in detail as a way of protecting the identity of the participants. However, the findings from this study point to the potentially critical role a designer's socio-cultural identity plays in their centering of social justice, as this identity was an important aspect of participant's reflection and understanding of power dynamics in their projects. Therefore, future studies using methodologies that allow for a central role of identity, such as autoethnography, may be useful in revealing these connections.

Finally, in line with Stake's (2006) methodology, the cases for this study were purposefully selected and are therefore not a representative sampling of all scholars doing social justice-related work in the field of learning, design, and technology. As well, the

participants in this study were all employed by institutions of higher education, and four out of five were in the position of associate or higher. The process of negotiating social justice issues may look different when the designer works in different contexts, such as a corporation or a non-profit institution. At the same time, representativeness is not the goal of a grounded approach such as that used in this study. Stake (2006) explained that a choosing cases for a multiple case study should be based on what cases may tell us the most about the phenomenon under study; this selection criteria helps build our understanding of the phenomena from solid grounding.

In this study, I engaged in multiple strategies to increase trustworthiness and credibility. First, I triangulated data within each case by using multiple data sources including interviews, public documents such as podcasts, presentations, and websites, and peer-reviewed literature. I also engaged in multiple points of contact with each participant to build rapport and trust (Roulston, 2010). After drafting the initial findings for each case, I sent these to the participants for member-checking, i.e., review and feedback. Several participants also scheduled follow-up interviews where we discussed their case as well as how they wanted to see the field of LDT grow in regard to our understanding of and approach to justice and equity. To create the overall process figure, I relied on the data from each case engaging in the case-quintain dialectic (Stake, 2006), i.e., continual and repetitive movement between case findings, themes, and research questions looking for both patterns and atypicalities. This method allowed me to develop an understanding of what the data from this study revealed about the phenomenon of negotiating issues of social justice.

Conclusion

As a field, LDT has a lot of room to grow in our understanding of social justice and the ways we may support justice through our research and professional practice. In their review of 7708 studies in educational technology, Kimmons (2020) recently noted that only 0.4% of the abstracts mentioned "justice" and another 0.4% mentioned "equity" or "equitable" (p. 807). Among the literature we do have on issues of justice and equity, the majority tend to offer model-based approaches to negotiating these issues (e.g., Heggart at al., 2020; Yusop & Correia, 2012; Young, 2008a). The inherent risk with a model-based approach to social justice and equity is that it makes the process sound like a recipe or list of practices to be followed. The results of this study suggest that greater care should be given to the way social justice work is taken up in the literature. Overall, the process that our participants engaged in was complex, relational, and highly situated. While no single approach to design could capture those complexities, it is my hope that the process detailed in this study offers other designers a starting place – a guide that can support their own unique perspectives while attuning their awareness to some of the more common elements that emerge when negotiating social justice in their own work.

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CHAPTER 6

Conclusion

Socio-Cultural Context

In June of 2020, the COVID-19 pandemic in the US intersected with the resurgence of the Black Lives Matter movement. 'Social justice' hit its peak popularity on Google search, since the site began tracking terms in 2004. Many corporations, institutions, and individuals sought to align themselves -- at least on paper -- with the calls for more attention to diversity, equity, and inclusion (DEI). Discussions around the systemic nature of racism were heightened by the economic and racial disparities revealed by the pandemic; disparities in both access to healthcare and in the social determinants to health, e.g., education, housing, and occupation. Although these disparities are historical, existing long before the pandemic, these issues were now actively being discussed in the mainstream. The field of Learning, Design, and Technology (LDT), like many other academic fields, followed suit. The Association for Educational Communications and Technology (AECT), the major professional organization in the field, focused on the social-justice adjacent topic of Culturally-situated Learning Design and Research as the theme for their 2020 conference and followed with a summer research symposium on Toward Inclusive Learning Design: Social Justice, Equity, and Community.

These recent efforts, as well as those in the past (e.g., the 1994 *Educational Technology* special issue on the Ethical Position of Educational Technology in Society)

serve to encourage research in LDT around social justice related issues. However, despite these efforts, as a field LDT has not yet reached the point where concerns over social justice are embedded in our professional practice. Several scholars have called out the lack of attention within LDT on issues related to social justice such as culture (Asino, Giacumo, & Chen, 2017; Subramony, 2004; 2017), ethics, morals, and values (Gray & Boling, 2016; Moore, 2009; 2014), and gender and social identities (Campbell, 2020; Romero-Hall et al., 2018; Subramony, 2018). To reach the point where concerns over social justice are as embedded in LDT as the ADDIE approach, we need to better understand how to align our professional practice with these concerns. In other words, we need more research that looks at the intersections of LDT and social justice.

To attend to this need, the overarching purpose of this dissertation was to explore the ways scholars in Learning, Design, and Technology (LDT) attend to issues of social justice through their professional practice. Below I discuss the findings from each of the four studies presented in this dissertation. In particular, I attend to the ways each study contributed to and/or challenged my understandings of social justice in LDT at that moment, as well as the ways this developing understanding guided my overall inquiry process.

A Reflection on the Overall Inquiry: Process and Findings

To understand how scholars in LDT attend to issues of social justice, I began by examining my own practice as a learning designer embedded in a Research Practice Partnership (RPP) with a diverse, rural, K-12 school system. In line with research that extracts design practices from observation or self-report of instructional designers (e.g., Kumar & Ritzhaupt, 2017; Sugar & Luterbach, 2016) and work that engages with theory

to construct design practices (e.g., Herrington & Oliver, 2000; Savery & Duffy, 1995), my initial plan was to develop a set of design practices that related to addressing social justice issues in the K-12 classroom. The first two articles in this dissertation describe the results of this work.

In particular, in the first study we found that teachers needed more support for building community connections and discussing sensitive topics, engaging in multimodal expression, and building scaffolds around developing multiple perspectives. For this study, I interviewed two white male high school teachers about the challenges and opportunities they experienced with a place-based approach to teaching history. The teachers' place-based, historical thinking approach was unique in their school system, and became the basis for a larger project involving multiple teachers across grade levels and content areas. The insights from this study informed future professional development sessions for the larger project.

The second article discussed the project's expansion into the middle school. We worked with a larger, more diverse group of teachers over two years through professional development workshops and classroom observations and support. This article explored how these diverse teachers -- in terms of content areas, backgrounds, racial and gender identity -- took up issues of race, economics, and history in their classrooms. We found teachers engaged in three learning strategies including: the personalization of history, historical perspective taking, and modeling a critical position. These learning strategies, along with the theories behind the place-based approach to humanities we embraced in this project, informed the development of a grant proposal that further expanded the

project to undergraduate education, adding an historically black university (HBCU) to the RPP team.

As I continued to reflect on my positionality within the RPP, the context of the project, and on what I was observing in the professional development workshops and in the classrooms, I began to question whether extracting design practices from this context would be enough to support others in attending to the social justice issues prevalent in their work. In particular, as the RPP project continued to expand, it became clear there was more to *centering social justice* than applying the learning strategies and design practices identified in our first two publications. These strategies worked for *these* middle school teachers and their students, however, even in this context not all project participants took up the same strategies. There was more going on here than the identification, distribution, and implementation of socially-just design practices. As a designer on the project, I became aware of another layer of understanding that drove how I engaged with others in the project. I also realized this engagement was not static; it continued to change as my understanding of the project, the other people involved, and even what social justice meant in this context changed.

The third article explored this additional layer of understanding, focusing on what I understood to be a central aspect of social justice in this RPP context -- accountability as a learning designer. The article built on my own experience and situated this within relevant theoretical constructs (e.g., positionality, intersectionality, critical consciousness). A conversation I had with a teacher during a classroom observation became the grounding for the article. After the lesson was over, the teacher and I were discussing her approach and she said to me, “I just don’t see why it always has to be

about slavery." As a black woman, she was not trying to dismiss historical or current day oppressions but rather was describing how hurtful a focus *only* on oppression can be for children, in this context, particularly black children. This conversation revealed my own blind spots around social justice issues as they related to K-12 education. It led me to deeply reflect on my positioning as a white woman, as a researcher who had not taught in a K-12 classroom, and as a former community organizer around anti-racism issues. Writing this article was difficult, as it required exposing my own misunderstandings, my own perceived failures around issues of social justice. At the same time, attending to issues of social justice is not something one gets right all the time. I believe being transparent about this process can improve our understanding of what it means to do social justice work, and therefore, improve our equity-related outcomes. Writing this article also led to broader questions around how other scholars were doing the work of *centering social justice* in their professional practice.

Therefore, for the fourth article I looked across five LDT scholars engaged in work around social justice issues to better understand what this process looked like in different contexts. I found these scholars were engaged in a complex, relational, dynamic process. This process was framed by their own design perspectives, their understanding of the project and social justice goals, as well as by other project team members' understandings and goals. Differences in these understandings and perspectives caused specific tensions the designers attended to by creating and implementing design practices. Therefore, the design practices themselves were situated within the designer's broader understanding of the project and the centering of social justice. Interestingly, this overall process was shared across participants, although each had a different view on what it

meant to *center social justice* in their project. Future research should attend to these different views on social justice and how they impact the project's justice-based outcomes.

Overall Implications

Attending to issues of social justice through learning design and research is not a straightforward process. As a field that heavily relies on process models, LDT needs to be cautious in applying this approach to social justice issues. Although many instructional design models were not necessarily designed to be followed as step-by-step guides, unfortunately, in practice many designers do report using models this way (Stefaniak & Xu, 2020). There are several approaches in the current literature around social justice in learning design that also take this model-based approach (e.g., Higbee et al. 2012; Heggart et al., 2020). Similarly, the first two articles in this dissertation approached social justice in this way, i.e., by trying to identify and extract design practices that supported socially-just designs. However, this approach tends to downplay the role of the designer's and others' goals, perspectives, and understandings on the design process.

The results of the final two studies in this dissertation suggest that a designer's identity and perspectives were a critical part of the process of *centering social justice* in their professional practice. In particular, these findings suggest that designers who wish to center social justice in their professional practice need to be attuned to the ways themselves and others are positioned within a project in terms of power, agency, and identity, and the ways these positionings may impact goals and understandings. As learning design is a process that always involves an interaction between self and others, our and others' understandings, goals, and perspectives are inherently part of that

process. In particular, when considering issues of social justice, differences in these understandings, goals, and perspectives due to power dynamics, socio-cultural identities, and personal and professional roles, are particularly relevant to consider. An individual's lived experiences with issues such as privilege, equity, oppression, and inclusion impact their understandings of these issues (Haraway, 1988). Therefore, the socio-cultural identities and professional roles of designers as well as design team members and others (e.g., learners, stakeholders), impact the ways they may define and take up issues of social justice in a design project. Understanding the ways differences may emerge during a project may help designers plan specific design practices to attend to these differences in meaningful ways.

Final Thoughts on Attending to Social Justice in the Field of LDT

In the time I spent researching and writing this dissertation, from 2018 to 2022, the number of articles published around issues of social justice in the field of LDT has grown significantly. Although I am excited about the increased attention around such an important topic, I also have some concerns regarding the potential for social justice to become -- as Gloria Ladson-Billings (2015) described -- a "buzzword" or a "cant." In practice, social justice as a "buzzword" looks like what other scholars have referred to as the "cooption" of social justice (Jones, 2019). Cooption is when individuals use words like diversity, equity, and inclusion, but engage in practices that uphold the status quo. By not attending to the multitude of ways inequity is systemically and structurally supported, and one's place within these structures, a co-optive approach strips the concept of social justice of its criticality and transformative potential.

Avoiding co-optive approaches to social justice in learning design and research requires an approach to professional practice that I do not currently see reflected in our common models or practices. Most importantly, design and research that attend to issues of social justice cannot be engaged in objectively, i.e., by removing oneself from the process. Rather, as these studies suggest, attending to issues of social justice requires attending to your positionality, i.e., learning about the ways your perspective, values, and culture impact your understanding of the world and others. It also requires being actively accountable to others, by engaging in self-reflection, critical perspective-taking, and dialogic communication (Walters & Kopcha, in press). It involves "understanding others as they want to be understood," i.e., from their own socio-cultural perspective (Interview with Case #5). In sum, attending to issues of social justice requires embracing and making transparent our various subjectivities and the ways they matter to our design process, especially in terms of equity and inclusion.

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Appendix A

General Critical Incident Interview Protocol

Note: Using this general protocol, a specific protocol was created for each participant based on my initial scholarly and public document analysis.

Introductory

- Can you tell me a little bit about X project?
    - How did it get started / how did you get involved
- What is your role on the project?
    - Has it changed over time?
- What social justice related issue/s do/es the project address or what issue/s are part of the context of the project?

Critical Event

- Think about a time during this project when one of these issues was really brought to the forefront --
    - Prompting: maybe you had to negotiate or address tensions, disagreements, or maybe something was revealed that improved the design/project, or maybe there was a challenge to yours/team members ideas / revealing the ways prior experiences framed your/team members ideas and/or practices
- What happened?
- What did you do?
    - What was your process -- what were you thinking, who did you talk to, how did you feel?
- What was the outcome / how did it impact the project?

Personal Experiences

- How do you attend to issues of <social justice> in your research and design work?
    - How has this developed over time?
- Why is it important for you to do this work?
    - What personal experiences or values motivate you?

General Ideas

- How do you feel the field of LDT, in general, takes up issues of social justice?
    - Are we doing enough? What should we be doing?
- What philosophical perspectives, theories, and methodologies do you think are important to support this work?