

ATHABASCA UNIVERSITY

INFORMAL FACULTY LEADERSHIP IN BLENDED LEARNING:

A CASE STUDY IN PHILIPPINE HIGHER EDUCATION

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Approval of Dissertation

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Dedication

To God, my constant source of strength and wisdom,
and to my family, whose love and belief in me sustained me throughout this journey.

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Abstract

Blended learning initiatives in Philippine higher education expanded following pandemic-driven mandates for flexible delivery. However, existing capacity-building initiatives have largely focused on formal academic leaders or on developing individual faculty competencies. Faculty who influence colleagues' blended learning practices without formal authority remain underrepresented in institutional programs. This study examined the conditions that supported and hindered informal faculty leadership in blended learning and considered how these conditions inform the design of capacity-building initiatives. The study was conducted as an exploratory qualitative instrumental case study within a multi-campus Philippine public university system. Participants were 20 faculty members identified as informal leaders in blended learning through peer, administrator, or self-nomination. Data were gathered through individual semi-structured interviews, a focus group discussion, and document review, and were analyzed using reflexive thematic analysis to develop interpretive insights across participants' accounts. The analysis produced four interrelated insights. First, informal leadership was enacted through contribution-oriented practice grounded in practical problem-solving, developing and sharing instructional materials, modeling, and collegial support rather than formal authority. Second, influence depended on legitimacy and voluntary uptake, making informal leadership relational and negotiated. Third, blended learning functioned as institutional infrastructure that sustained instructional continuity during disruption while operating under persistent constraint. Fourth, informal leadership developed as a patterned compensatory response to institutional misalignment, where institutional

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expectations exceeded available structural support. The study contributes a structural conceptualization of informal faculty leadership as compensatory institutional work and offers a conceptual lens that reframes capacity building in blended learning as a matter of institutional alignment rather than professional development alone. Strengthening informal leadership therefore requires attention not only to individual capability, but also to how workload, infrastructure, authority, and recognition are aligned with institutional expectations. Without such alignment, informal leadership remains compensatory and vulnerable to strain. Future research may examine institutional misalignment in other reform contexts beyond blended learning, explore how institutional alignment can be strengthened across higher education settings, and examine how compensatory informal leadership evolves over time.

Keywords: informal leadership, blended learning, higher education, capacity building, distributed leadership, institutional misalignment

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List of Symbols, Nomenclature, or Abbreviations

AU	Athabasca University
BL	Blended learning
CHED	Commission on Higher Education
CoP	Community of practice
COVID-19	Coronavirus disease 2019
ERASMUS +	European community action scheme for the mobility of university students Plus
HEI	Higher education institution
IREC	Institutional Research Ethics Committee
ICF	Informed consent form
IPA	Interpretative phenomenological analysis
OC	Office of the Chancellor
ODL	Open and distance learning
OFG	Online focus group
OVCAA	Office of the Vice-Chancellor for Academic Affairs
REB	Research ethics board
RQ	Research question
RTA	Reflexive thematic analysis
SIBOL	Sustainable institution-building for open learning

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TCPS 2 Tri-council policy statement: Ethical conduct for research involving
humans, 2nd edition

Chapter 1. Introduction

Digital transformation in higher education is increasingly understood not as the simple adoption of new technologies, but as a broader reconfiguration of teaching, learning, and institutional practices (McCarthy et al., 2023). As digital technologies continue to evolve, institutions are prompted to reconsider how learning is designed, delivered, and supported within existing structures. Within this context, digital transformation in education refers to the integration of digital technologies into teaching and learning processes, with the potential to drive meaningful educational change and pave the way for innovative approaches (Organisation for Economic Co-operation and Development [OECD], 2023).

Blended learning, which thoughtfully integrates in-person and online learning experiences (Garrison & Kanuka, 2004; Hrastinski, 2019), represents one such innovative approach. This reconfiguration accelerated during the COVID-19 pandemic, compelling institutions to adopt flexible and remote learning modalities at scale, and thus contributing to the expanded and sustained use of blended learning in higher education (Batista-Toledo & Gavilan, 2025; Dei, 2024; Sain et al., 2024). At the same time, the implementation of blended learning within institutions involves the work of individuals who support, shape, and influence these practices in context.

Distributed leadership offers a way of understanding how leadership work is shared across individuals within educational settings, particularly through interactions and collaborative activity (Harris et al., 2013). Within this perspective, leadership is understood as practice distributed across both formal and informal actors and shaped through interactions among leaders, followers, and the situations in which they work

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(Spillane, 2006). Informal leaders, in this setting, play important roles in influencing colleagues and supporting changes in teaching practice, often acting as catalysts for the adoption of innovative approaches (Kezar & Lester, 2011). In the context of blended learning in higher education, faculty practitioners who do not hold formal leadership roles (Pielstick, 2000), yet provide direction and influence others (Leithwood et al., 2004), are considered informal leaders.

In this exploratory qualitative case study, I examined the conditions that supported or hindered informal faculty leadership in blended learning within a Philippine higher education institution system. The aim was to generate insights that could inform the design of capacity-building initiatives for informal leaders, a group that remains underrepresented in institutional development efforts. Faculty members who act as blended learning champions can encourage peers to adopt e-learning practices (Cavalli et al., 2007). Such roles are interpreted in this study as forms of informal leadership.

In this chapter, I first situate the study within its background and context, then present the research purpose and research questions. I outline the significance, limitations, and delimitations of the study, and conclude with definitions of key terms.

Background and Context

Understanding the national educational context is essential for examining how blended learning and informal leadership operate within Philippine higher education. An overview of the country's education system provides the broader institutional and historical context for this study.

Education in the Philippines

The Philippines is a Southeast Asian country whose island geography and colonial history have shaped its social institutions, including education. Although the country has experienced more than three centuries of Spanish rule, American colonial influence from 1901 to 1945 has also exerted a significant influence on the development of the Philippine education and training system [Association of Southeast Asian Nations Qualifications Reference Framework Referencing Report of the Philippines (AQRF-PH), 2019].

The Philippine education system is largely market-driven, with the State assuming a facilitative role. It encompasses formal and non-formal education and training, and recognizes knowledge and skills acquired through prior learning and experience. Formal education is organized into three levels: basic education (kindergarten to Grade 12); technical-vocational education and training; and higher education, comprising baccalaureate, post-baccalaureate, and doctoral or post-doctoral programs. Responsibility for oversight is distributed across different agencies, with the Commission on Higher Education (CHED) overseeing universities and colleges.

According to the 2019 AQRF-PH, CHED recognizes and supports traditional and non-traditional modes of delivery. Traditional delivery refers primarily to in-person instruction, while non-traditional modes include open and distance learning (ODL) approaches. In-person instruction requires teachers and students to be in the same physical space at the same time and has traditionally been organized around a teacher-centered approach, where the teacher delivers content through lectures while students listen. The ODL models consist of learner-centered and guided independent study

mediated by technology, ladder education programs, the Expanded Tertiary Education Equivalency and Accreditation Program (ETEAP), and transnational education programs (AQRF-PH, 2019).

Open Distance Learning in the Philippines

In 2014, the Philippine government enacted Republic Act No. 10650, known as the Open Distance Learning (ODL) Act, as a formal commitment by the government “to expand and further democratize access to quality tertiary education through the promotion and application of open learning as a philosophy of access to educational services, and the use of distance education as an appropriate, efficient, and effective system of delivery” (Republic Act No. 10650, 2014, p. 1). The Act mandated the University of the Philippines Open University (UPOU), the single-mode distance education constituent unit of the state university system, to assist national agencies and other higher education institutions through capacity-building programs for ODL.

Despite the passage of the ODL Act, traditional in-person instruction remained the dominant mode of teaching in Philippine higher education. The adoption of online, distance, and flexible learning approaches was limited and largely discretionary across higher education institutions (Arinto et al., 2022). ODL functioned more as an option than a mainstream approach to teaching and learning.

A more substantial shift occurred in 2020, when the COVID-19 pandemic compelled all academic institutions to rapidly transition to remote and online learning (Arinto et al., 2022). This period marked the first time that ODL was implemented at scale across the sector, as institutions sought to provide continuity of education under emergency conditions.

Adopting Blended Learning at the National Level

In response to the disruptions to in-person instruction during the COVID-19 pandemic, Philippine higher education authorities issued a directive requiring higher education institutions to adopt flexible modes of instruction, including blended learning, to ensure the continuity of inclusive and accessible education when in-person teaching was not possible (Commission on Higher Education [CHED], 2020). This was particularly relevant in the Philippine context, where geographic dispersion across islands made flexible and blended delivery important for increasing access to higher education. CHED further mandated universities and colleges to develop continuity plans for the sustained adoption of flexible learning systems, while allowing institutions to implement delivery methods appropriate to the context of teachers and learners. Considerations included access to technology, device availability, digital literacy, internet connectivity, and pedagogical approach. Within this framework, flexible learning encompassed a range of strategies including online, offline, and blended modalities.

Reports on the implementation of blended learning during this period presented mixed findings. While some institutions found that faculty members were highly motivated and expressed favourable attitudes towards combining in-person and online approaches (Alconis, 2022; Alvarez & Galman, 2023), others reported pedagogical, technological, and health-related struggles as they implemented blended learning under constrained conditions (Alvarez, 2020; Cabello, 2022; Cahapay, 2020).

Several studies highlighted the role of institutional support in shaping faculty engagement with blended learning. Cabauatan et al. (2021), for example, found that while faculty members demonstrated readiness and recognized the benefits of blended

learning, adoption remained uneven due to structural and resource-related constraints. These included the additional time required for course preparation and online interaction, limited and unreliable internet connectivity, and restricted access to platforms, all of which affected faculty's willingness to sustain blended learning practices. The authors emphasized the need for stronger institutional measures, including targeted training, improved technological infrastructure, incentives for faculty engagement, and sustained technical support. These conditions were identified as critical in supporting not only initial adoption but also the continued use of blended learning in practice (Cabauatan et al., 2021).

Capacity Building for Formal Blended Learning Leaders

In 2022, UPOU implemented the Sustainable Institution Building for Open Learning (SIBOL) project in response to the growing need for capacity-building in blended learning (Arinto et al., 2022). SIBOL was an initiative, co-funded by the European Union's ERASMUS+ Program and UPOU, that aimed to mentor and train higher education institutions in planning, managing, and sustaining blended, online, and open learning programs. Its overall focus was on strengthening institutional capacity for blended learning while supporting long-term sustainability in institutional development.

The rationale for focusing on programs and institutions stemmed from critical reflections by UPOU researchers, who observed that many existing initiatives focused on individual ODL practices at the classroom or course level, rather than on program-level or institution-wide implementation of blended and online learning. For example, within UPOU's offerings, formal training in blended learning was available through degree pathways in the master's program and the graduate certificate program in distance

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education. Non-formal options were also available through customized and on-demand institution-based workshops, massive open online courses (MOOCs), and professional development engagements (Arinto et al., 2022). While these initiatives supported individual practitioners, they did not fully address the system-level requirements for implementing and sustaining blended and online learning across programs and institutions.

SIBOL was developed to address this gap through a three-phase design: a training program on systems for blended learning (Phase 1), a mentoring and network-building component (Phase 2), and the designation of institutional leaders as zonal centers for blended and online learning (Phase 3). SIBOL launched the first phase in 2022, involving teams of academic administrators from 23 higher education institutions who held mid- to upper-level leadership positions in planning and managing blended, online, and open learning (BOL) within their respective institutions (Arinto et al., 2022; Marcial et al., 2023). Phase 2, which supported institutional collaboration in implementing BOL initiatives, was implemented in 2023 (Arinto et al., 2023), while Phase 3 remains in the planning stage.

Statement of the Problem

Existing capacity-building initiatives for blended learning in Philippine higher education primarily address the needs of mid- to upper-level academic leaders or focus on developing individual faculty members as blended learning practitioners. Programs such as SIBOL are designed to strengthen institutional and program-level leadership, while UPOU's formal and non-formal offerings primarily support individual faculty members seeking to develop their blended learning competencies. Neither explicitly

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addresses the needs of informal faculty leaders in blended learning, who are often experienced or expert practitioners playing influential roles despite not holding formal leadership positions. Consequently, no national capacity-building programs are specifically designed to support and nurture this group of existing informal faculty leaders in blended learning.

Research suggests that engaging faculty members with more experience in blended learning can facilitate the broader uptake of e-learning and blended learning practices within higher education institutions. Cavalli et al. (2007), for example, found that experienced blended-learning practitioners can serve as peer mentors. This evidence indicates that blended learning champions support both novice and experienced practitioners and contribute to institutional efforts to expand blended learning.

Despite this evidence, informal faculty leaders in blended learning remain largely absent from the focus of existing capacity-building programs in the Philippine context. This gap underscores the need for research examining the conditions that support or hinder informal faculty leadership in blended learning, and for informing the design of targeted capacity-building initiatives for this underrepresented group.

Purpose and Research Questions

The purpose of this qualitative study was to explore the experiences of informal faculty leaders engaged in blended learning within the Philippine university system to understand the institutional conditions that shaped their leadership practice. Specifically, the study examined the factors that supported or hindered informal faculty leadership in blended learning, and considered how insights derived from this exploration might

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inform the development of capacity-building initiatives for faculty members with informal leadership roles.

The overarching research question arising from the problem statement was as follows:

How can knowledge of the conditions that supported or hindered informal faculty leadership in blended learning in Philippine higher education institutions inform the development of a capacity-building program for these leaders?

The specific research questions were:

RQ 1. What conditions supported informal faculty leadership in blended learning within a Philippine university system?

RQ 2. What conditions hindered informal faculty leadership in blended learning within a Philippine university system?

RQ 3. How can knowledge of the conditions that supported or hindered informal faculty leadership in blended learning inform the development of a capacity-building program for informal leaders within a Philippine university system?

These questions were designed to capture enabling and constraining conditions, and to link the insights developed through the study to the practical aim of capacity-building.

Two definitions of the term, *conditions*, were relevant to the focus of this study. First, conditions referred to “the situation that someone lives or works in, or that someone or something is affected by” (Cambridge, n.d.). In the context of an exploratory study on informal faculty leadership in blended learning, for which there was limited precedent, this definition allowed for a broad understanding of conditions that have

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included personal circumstances, workplace dynamics, and wider sociocultural or institutional contexts.

A second, more conceptual understanding of conditions was informed by Kurt Lewin's Force Field Analysis, a well-established model in organizational change literature (Lewin, 1947, 1951). This model provided a structured way of examining how change was shaped by competing forces, specifically, those that promoted movement toward a goal and those that hindered it. Lewin proposed that meaningful change occurs when driving forces outweigh restraining forces. From this perspective, conditions were understood as the dynamic interaction between these opposing influences that either facilitated or impeded progress toward a desired outcome (Lewin, 1947, 1951).

This study generated interpretive insights that may inform the development of a capacity-building program for informal leaders in blended learning within the institutional context of the bounded case.

Significance

Locally, the interpretive insights developed through this study may inform capacity-building initiatives for informal leaders involved in blended learning within the university system under study. Over time, these insights may also serve as a reference point for similar initiatives at other universities and colleges.

Capacity-building initiatives in higher education have often been conceptualized as faculty training or professional development programs. While such initiatives remain important, this focus on training may overlook broader institutional conditions that influence how blended learning practices are adopted and sustained. By examining the experiences of informal faculty leaders in blended learning within a particular university

system, this study generated insights that may help strengthen blended learning capacity beyond training alone, including attention to the institutional environments in which faculty work.

Research by Cavalli et al. (2007) indicated that engaging faculty members with more experience in blended learning can facilitate the uptake of e-learning among novice or non-users, complementing institutional technology and support mechanisms. These authors also suggested that e-learning champions can function as peer mentors by exchanging ideas, sharing practices, and initiating innovations.

Interpretations developed through this study align with these perspectives, as participants described how experienced blended learning practitioners informally supported colleagues through peer guidance, demonstration of practices, and sharing of instructional strategies. Given the central role of e-learning in blended learning environments, these interpretations further highlight the importance of strengthening and sustaining informal faculty leadership in such environments.

Beyond the Philippine context, this study contributes to educational leadership scholarship by extending the relatively limited body of literature on leadership in higher education, particularly research on informal faculty leadership (Esen et al., 2020; Guy, 2005; Turner, 2013). Scholarship on informal or grassroots leadership among faculty remains dispersed across different conceptual traditions and has developed gradually over time. Early studies examining grassroots leadership in higher education include Thomas and Willcoxson (1998), Kezar and Lester (2009), and Kezar et al. (2011), with subsequent work extending these discussions in different institutional contexts (Davidson

& Hughes, 2022; Goldfein & Badway, 2015; Kezar & Holcombe, 2017; Pleschová & Simon, 2025).

Bibliometric analyses indicate that much of this scholarship has been concentrated in a relatively small number of national contexts, particularly the United States, the United Kingdom, and Australia (Esen et al., 2020), with more recent work emerging from Central Europe (Pleschová & Simon, 2025). By examining informal faculty leadership in blended learning within Philippine higher education, this study contributes a Southeast Asian perspective and extends current conversations on leadership, digital transformation, and educational change in underrepresented contexts.

Scope of the Study

The participants were faculty members within a multi-campus public university system in the Philippines who were recognized by colleagues as informal leaders in blended learning. The study focused on the conditions that enabled these informal leaders to provide direction and exercise influence in blended learning, as well as those that constrained their ability to do so.

Accordingly, the study did not examine the personal characteristics, traits, or leadership behaviours of informal faculty leaders. Instead, the scope was limited to the situational, relational, and institutional conditions that shaped how informal leadership in blended learning was supported or hindered within the university system under study.

Limitations and Delimitations

The limitations of this study were primarily attributable to the nature of case study methodology.

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First, the study was situated within a single bounded case, which meant that the insights derived were context-specific and reflected the institutional, cultural, and historical conditions of the university system under study. Rather than assuming generalizability, other institutions may use these insights to examine whether similar conditions and patterns of informal leadership are evident in their own settings. Second, the interpretive nature of qualitative inquiry meant that the analysis was shaped by my positionality and analytic judgments. Reflexive practices, including journaling and memoing, were used to examine and document how my perspectives informed the interpretive process. Lastly, the funding limits and time-bound nature of doctoral dissertation research constrained the extent to which the research design was implemented.

The study's delimitations set intentional boundaries that defined its scope and focus. As an academic at one of the autonomous universities in the university system under study, my location and context informed the decision to examine the system as a single bounded case, with various autonomous units treated as embedded subunits of analysis. The study focused specifically on informal faculty leaders in blended learning foregrounding the teacher dimension in flexible learning.

Another delimitation involved the operational definition of an informal faculty leader in blended learning. This definition integrated Leithwood et al.'s (2004) conception of leadership as providing direction and exercising influence, with the understanding that informal leaders did not hold formal authority (Pielstick, 2000).

The choice of a qualitative approach was informed by my constructivist paradigm, relativist ontological, constructivist epistemological, and value-laden

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axiological orientations, as discussed in the section on research paradigms and worldview. In addition, the attributes and practicality of videoconferencing informed its selection as the platform for conducting participant interviews. The use of a videoconferencing platform expanded the reach of the study and enabled faculty participation across the three major island groups in the Philippines, while offering logistical feasibility within the constraints of doctoral research with limited funding.

Definition of Terms

This section defines key terms as used in this case study on informal faculty leadership in blended learning within Philippine higher education.

Autonomous University refers to an individual autonomous university within the multi-campus public university system examined in this study, hereafter referred to as “The University System.” The term is used as an anonymized designation in place of the constituent university’s official name.

Blended learning refers to the thoughtful integration of in-person classroom learning with online learning.

Capacity building refers to the process of developing the knowledge, skills, and resources that individuals or groups need to perform effectively and support sustainable change.

Capacity-building program refers to a structured initiative designed to develop knowledge, skills, and support systems for sustained practice.

Conditions refer to the situational or circumstantial factors that enable, constrain, or influence the development or occurrence of a particular phenomenon.

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Digital transformation in education refers to the strategic integration of digital technologies into institutional processes, practices, and cultures to enhance teaching and learning.

Distributed leadership refers to a leadership practice that is distributed across leaders, followers, and situations, taking shape through their interactions

Embedded single-case design refers to a case study design involving one bounded case with multiple subunits of analysis.

Flexible learning refers to an approach that adapts methods of instructional delivery, time, and place of learning to meet diverse student needs.

Formal leader refers to an individual who holds an officially designated leadership position within an organization.

Grassroots leadership refers to leadership that emerges organically from within a community or group, often outside formal structures, and is driven by shared values, local knowledge, and collective action.

Informal faculty leader refers to a faculty member in higher education who provides direction and influence in practice without holding formal authority

Informal leader refers to an individual who provides direction and influence, despite not having a formal role or authority.

Open and Distance Learning (ODL) refers to a mode of education that enables learning without requiring physical co-presence, often mediated by technology.

Proposition refers to a theoretically informed statement that narrows the focus of inquiry by guiding what should be explored and where relevant evidence may be found.

Reflexive thematic analysis refers to a flexible and interpretive approach to thematic analysis that emphasizes the researcher's active role, reflexivity, and theoretical positioning in constructing patterns of meaning from qualitative data.

The University System refers to a multi-campus public university system in the Philippines that serves as the bounded case for this study. The term is used as an anonymized designation in place of the actual name of this institution.

Thematic analysis refers to a method for systematically identifying, analyzing, and reporting patterns of meaning within qualitative data.

Theory refers to a structured set of concepts and ideas that explains the relationships among phenomena.

Triangulation refers to the use of different sources or methods to verify and enhance the accuracy of research findings.

Summary

In Chapter 1, I provided background on the adoption of flexible learning approaches in Philippine higher education and outlined national and institutional responses to capacity-building efforts in blended learning. I discussed the policy context that informed the uptake of blended learning, as well as the focus of existing capacity-building initiatives at the institutional and individual levels. I identified a gap in these initiatives, noting that current programs do not explicitly address the needs of informal faculty leaders who play influential roles in blended learning despite the absence of formal authority. Capacity-building initiatives in higher education have often focused on professional development programs, sometimes overlooking broader institutional conditions that also shape practice.

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In response to this gap, I conducted a qualitative study examining the conditions that supported or hindered informal faculty leadership in blended learning within Philippine higher education. Here, I presented the study's purpose and research questions, clarified key concepts and definitions, and outlined the significance, scope, limitations, and delimitations of the research. Together, these elements established the foundation for the inquiry and situated the study within the broader contexts of educational change, leadership, and blended learning.

The conceptual and empirical review in Chapter 2 examines literature on educational change in the digital age, blended learning in higher education, leadership scholarship, and informal leadership. It also introduces Lewin's model of organizational change as a lens for examining the institutional conditions within which these processes unfold, providing a conceptual foundation for the study.

Chapter 2. Conceptual and Empirical Review

Introduction

In this chapter, I review scholarship relevant to the research questions in the study and establish the conceptual foundations guiding the analysis. First, I situate blended learning as an institutional change process in higher education. I then examine leadership and educational change literature before outlining distributed leadership as the primary leadership perspective informing the study. The discussion subsequently focuses on informal and grassroots leadership in higher education as the specific form of influence under examination. Finally, I introduce Lewin's force field theory (1947, 1951) as a structural framework for interpreting the institutional conditions within which informal leadership operates.

Educational Change in the Digital Age

Although rapid advances in digital technologies have significantly transformed the global landscape of higher education (West, 2023), it is widely believed that the cessation of in-person instruction during the global COVID-19 pandemic in 2020 was the major factor that unintentionally fast-tracked the digital evolution of education worldwide (Bertoletti & Karpinski, 2024; Sato et al., 2023). The widespread disruption of education in countries with inadequate infrastructure and resources for information and communication technologies highlighted the crucial role of digital technology in ensuring education as a fundamental human right, as well as the need for open, resilient, and inclusive learning systems (Miao et al., 2022; Singh et al., 2021). At the same time, it is important to emphasize that distance education and online teaching and learning have

been well established for decades (Hodges et al., 2020). The literature has consistently indicated that effective online learning requires a deliberate instructional design process and substantial time for planning. For this reason, the emergency transition to remote teaching during the pandemic must be distinguished from well-designed online learning, as emergency remote teaching lacked critical design elements that support quality instruction due to limited preparation and planning (Hodges et al., 2020).

Institutional Variation in Digital Capacity

Because technology use is unevenly distributed, educational transformation resulting from digital technologies varies across contexts, including community and socioeconomic level, teacher willingness and preparedness, levels of education, and national income (West, 2023). Lessons learned from the pandemic further show that while technology helped preserve the continuity of learning for many students, “unprecedented educational dependence on technology often resulted in unchecked exclusion, staggering inequality, inadvertent harm and the elevation of learning models that place machines and profit before people” (West, 2023, p. 2). In response to these tensions, academic institutions worldwide have increasingly adopted hybrid or blended learning models (Cobo-Rendón et al., 2022; Guppy et al., 2022; Imran et al., 2023; Nikolopoulou & Zacharis, 2023; Sharma & Shree, 2023; Zara et al., 2022). These approaches offer more flexible and personalized learning experiences through varied instructional design and delivery methods while allowing institutions to maintain a selection of pedagogical approaches that can be aligned with context-specific capacities and constraints (Sato et al., 2023). The adoption of blended learning, which is commonly

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conceptualized as a combination of in-person and online instruction, represents one such pedagogical approach.

This variation in digital capacity underscores that blended learning is shaped not only by technological availability but also by the institutional conditions within which it is enacted. Existing literature identifies disparities in access, readiness, and resources (West, 2023; Sato et al., 2023), but these discussions are often situated at the level of systems and contexts. What remains less visible is how such conditions are encountered within institutions, particularly in the day-to-day work of faculty. Attending to these experiences brings into view the ways faculty respond to constraint and the forms of influence that arise in practice. This perspective informs the present study, which examines how institutional conditions support or hinder informal faculty leadership in blended learning (RQ1, RQ2), and how these conditions shape capacity-building efforts (RQ3).

Taken together, this body of work positions blended learning within broader processes of educational change associated with digital transformation. Much of this literature addresses institutional capacity, infrastructure, and pedagogical design, often at the program or system level. Less is known about how leadership is enacted within these changing conditions, particularly by faculty who influence practice without formal authority. This study takes up that space by examining how informal faculty leadership in blended learning is supported or constrained within specific institutional contexts (RQ1, RQ2), and how these conditions inform capacity-building efforts (RQ3).

Post-Pandemic Normalization of Blended Learning

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Emerging post-pandemic scholarship suggests that blended and online learning have moved beyond emergency response and are increasingly embedded within institutional strategy. Rather than focusing primarily on adoption, current discussions emphasize governance coherence, digital maturity, institutional preparation, and sustainable implementation (Alarakyia-Jivani et al., 2024; Paños-Castro et al., 2024). Systematic reviews of post-pandemic higher education further highlight the need to re-imagine teaching and learning through adaptive, resilient, and student-centered approaches, while addressing persistent inequities exposed during the crisis (Luvalo, 2024). Institutional leaders anticipate continued expansion of online and hybrid offerings alongside the retention of instructional innovations introduced during the pandemic, including synchronous modalities and redesigned engagement practices (Hart et al., 2024). At the same time, the transition has revealed enduring structural tensions related to workload, digital equity, faculty readiness, and institutional capacity (Sia et al., 2023; Oben & Hui, 2025). In this digitally normalized landscape, the leadership challenge shifts from rapid technological adoption to the coordination, legitimization, and sustainable integration of blended learning practices within existing institutional structures. Within this context, the question is no longer whether blended learning should be adopted, but how institutional conditions shape the leadership practices that sustain and legitimize it.

The movement from adoption toward sustained implementation shifts attention to blended learning as an ongoing institutional practice rather than a temporary response to disruption. Recent scholarship highlights issues of governance, coordination, and long-term integration, but the everyday work of sustaining these expectations remains less

clearly understood. There is limited insight into how faculty manage these demands within existing institutional arrangements and how leadership is exercised in the absence of formal authority. This study addresses these questions by examining how institutional conditions support or hinder informal faculty leadership in blended learning (RQ1, RQ2), and how these conditions inform the design of capacity-building initiatives (RQ3).

Blended Learning Adoption as Educational Change

Conceptualizing Blended Learning

Garrison and Kanuka's (2004) seminal paper defined blended learning as "the thoughtful integration of classroom face-to-face learning experiences with online learning experiences" (p. 96). Cleveland-Innes and Wilton (2018) further elaborated that blended learning was "the practice of providing instruction and learning experiences through some combination of both face-to-face and technology-mediated learning." In this study, *blended learning* was presented as a purposeful integration of online and in-person learning activities, structured around clearly defined learning outcomes.

Rather than simply combining formats, blended learning design involves making informed and deliberate decisions about what aspects of instruction, such as content delivery, facilitating interaction, and assessment, are more effective online and which aspects of instruction are best conducted in person. Online components provide flexibility and support independent, self-paced learning, while in-person sessions enable real-time dialogue, collaboration, and immediate feedback (Rasheed et al., 2020). The choice of digital tools and platforms is driven by pedagogical utility rather than convenience. A thoughtful blend considers course objectives, the learning environment,

and the capacities of teachers and students, ensuring that each element of the design serves a clear purpose in achieving the intended outcomes.

Theoretical Grounding

The practice of blended learning is grounded in established theoretical frameworks that inform its design and implementation in higher education. Among the models that have shaped blended learning scholarship, the Community of Inquiry (CoI) framework is widely recognized as foundational (Cleveland-Innes & Wilton, 2018). The CoI framework outlines how social, cognitive, and teaching presence interact to support meaningful learning in computer-mediated environments (Garrison et al., 1999; Garrison et al., 2010). Rather than treating online and in-person components as separate modes, the framework emphasizes their integration in creating coherent and purposeful learning experiences.

Blended learning has also been conceptualized from a systems perspective. The Complex Adaptive Blended Learning System (CABLS) framework (Wang et al., 2015) conceptualizes blended learning as a system composed of interacting subsystems, including the learner, teacher, technology, content, learning support, and the institution. These subsystems are described as dynamically interdependent, with each influencing and being influenced by the others in nonlinear ways. While this study does not adopt CABLS as an analytic framework, its inclusion of both teacher and institutional subsystems indicates that blended learning implementation extends beyond instructional design decisions and is also shaped by the organizational conditions within which these subsystems operate. This perspective is important for the present study because it reinforces the view that blended learning is enacted within institutional settings rather

than only designed at the course level. It also supports the study's focus on how leadership practice becomes relevant when blended learning implementation depends on conditions that shape what faculty can do in practice.

Blended Learning in the Higher Education Context

In higher education, blended learning is informed by principles of adult learning, particularly andragogy and heutagogy (Chamo et al., 2023). Andragogy emphasizes adult learners' self-direction and autonomy (Knowles, 1970), while heutagogy extends this orientation by foregrounding self-determined learning in negotiation with the instructor (Hase & Kenyon, 2000). These principles provide a pedagogical rationale for blended and distance learning in university settings.

Despite evidence that adult learners are receptive to blended learning because it affords flexibility, implementation in higher education remains challenging. Institutions report concerns such as premature withdrawal, uneven learning outcomes, and unsatisfactory experiences (van der Stap et al., 2024). Designing blended learning for higher education is a challenging task, and so is transitioning from conventional teaching and learning methods to blended learning (Boone, 2015). Educational change involving blended learning adoption is particularly challenging when undertaken in response to volatile environments and external forces (Kondacki, 2020), and in an era of artificial intelligence (Park & Doo, 2024).

Blended Learning Adoption as a Change Process

The potential of blended learning to improve the quality of teaching and learning is becoming more widely recognized in higher education (Lim et al., 2019). As a result, many institutions have initiated efforts to implement blended learning at an institutional

level. However, despite these efforts, sustaining and scaling such initiatives remain significant challenges. This may be attributed to the absence of a cohesive, institution-wide strategy, resulting in blended learning practices that remain confined to isolated programs or faculties. While innovative practices have developed, they are not yet widely integrated across the full range of courses and academic offerings. The challenges of promoting, maintaining, and expanding blended learning practices are often tied to the broader complexities of managing educational change (Lim et al., 2019).

In his seminal work on educational change, Fullan (2015) argues that real change, whether voluntary or imposed, involves a degree of discomfort, often characterized by “loss, anxiety and struggle” (Marris, 1975, p. 2) or uncertainty (Schön, 1971). However, successful change can result in “a sense of mastery, accomplishment, and professional growth” (Fullan, 2015, p. 8). Implementing educational change involves a “change in practice” (p. 11) grounded in reflective action. Fullan further contends that effective change processes “shape and reshape good ideas as [they build] capacity and ownership among participants” (p. 17). Based on evidence from the literature, Fullan (2015) states that successful change processes aim to close the gap, have socially based and action-oriented strategies, build internal and external accountability, establish conditions for motivation, prioritise capacity building, and leverage leadership. The last two concepts underpin the current research study.

Leadership and Educational Change

Leadership plays a pivotal role in driving educational change (Fossland & Sandvoll, 2023). Two decades ago, Leithwood et al. (2004) undertook a comprehensive research initiative to examine the impact of leadership on student learning. Based on the

evidence available at the time, the authors proposed that educational leadership is underpinned by two core functions: “providing direction” and “exercising influence” (p. 20). Different leadership forms may be understood as varied ways of articulating direction and mobilizing others toward shared goals.

Elo and Uljens (2022) similarly acknowledge that research has consistently affirmed the importance of setting direction, creating conditions for change, and influencing how others learn. At the same time, they argue that the field lacks conceptual clarity regarding how influence operates within pedagogical change processes.

In terms of practice, Leithwood and Jantzi (2008) synthesized research across school and non-school contexts and identified four core leadership practices:

- (a) Building vision and setting directions;
- (b) Understanding and developing people;
- (c) Redesigning the organization; and
- (d) Managing the teaching and learning program. (p. 29)

Revisiting these claims more than a decade later, Leithwood (2019) concluded that more recent empirical evidence continues to support these four core leadership practices for improving the learning experience. In technology-enabled and virtually connected contexts such as blended learning, however, Harris et al. (2013) contended that increasingly indistinct organizational boundaries require a different framing of leadership. They wrote:

In the wake of new technologies, it is unlikely that traditional leadership patterns will prove adequate to meet the emerging demands; hence, leadership must be

conceptualized and understood as generating and transferring knowledge, trust, and shared purpose in a distributed way. (Harris et al., 2013, p. 934)

This shift in perspective is important for the present study because it frames leadership not simply as formal direction from above, but as practice enacted across actors within changing institutional contexts. In blended learning environments, this opens the question of how faculty exercise influence without positional authority and how such influence is shaped by the conditions under which blended learning is implemented. These perspectives position leadership as more than the mere occupation of a formal role or the exercise of individual influence. They point instead to leadership as a practical and relational process shaped by context, interaction, and the work of guiding change. This is especially important in blended learning environments, where leadership may be exercised through coordination, support, and influence that do not necessarily follow formal lines of authority. For the present study, this opens an important line of inquiry, not only into who leads, but into how leadership is enacted under particular institutional conditions and how such conditions shape the practice of informal faculty leadership in blended learning.

Distributed Leadership

Building on this influence-centered understanding of leadership, the present study is situated within distributed leadership as its overarching theoretical perspective. Distributed leadership is a decentralized approach that “implies a social distribution of leadership where the function of the leader is stretched over the work of several individuals, and the task is accomplished through interaction and collective action” (Harris et al., 2013, p. 929; see also Harris, 2004; Tucaliuc et al., 2023). Consistent with

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Spillane and colleagues, the framework emphasizes leadership practice as enacted through interactions among leaders, followers, and situational conditions (Spillane & Timperley, 2004). The situational conditions in this study are examined in relation to broader institutional conditions that shape what leadership practice looks like on the ground. This links distributed leadership's emphasis on enactment to the supports and constraints within which informal faculty leadership takes shape.

Three distinguishing features are apparent in this distributed leadership perspective. First, it views leadership practice as the product of leaders, followers, and the situation interacting with each other, rather than as an act of an individual (Spillane & Timperley, 2004). Second, it expands leadership boundaries to include those without designated leadership positions, extending leadership beyond formally assigned roles and recognizing contributions from both formal and informal actors (Gronn, 2002; O'Shea, 2021; Spillane, 2006). Third, it maintains that expertise is distributed across the organization rather than concentrated in the hands of a few (Gronn, 2002; Spillane, 2006).

In the context of blended learning, these features highlight how leadership is enacted through everyday interactions rather than by formal designation alone. Distributed leadership offers a way of making sense of how influence moves across actors and situations. However, it gives less attention to how institutional conditions shape whether and how such leadership can be sustained in practice. In blended learning environments, where expectations for innovation often intersect with uneven access to resources and support, leadership may be enacted in ways that reflect these conditions.

This study draws on distributed leadership as a primary lens while attending to how such practices are shaped by the institutional contexts in which faculty work.

Core Concepts and Key Thinkers

Distributed leadership focuses on how leadership is enacted through interactions among multiple actors to accomplish organizational goals, rather than centering analysis on a single individual. In contrast to traditional leadership theories that emphasize personal traits, behaviours, or contingency-based styles (House & Aditya, 1997; Yukl & Gardner, 2020), distributed leadership shifts the unit of analysis from the individual leader to leadership practice within a social context.

The core conceptual foundations of distributed leadership are primarily associated with the work of Spillane (2006) and Gronn (2002). Spillane's (2006) practice-centered model emphasizes two key dimensions: the "leader-plus" aspect, in which multiple individuals assume leadership functions, and the practice dimension, in which leadership arises through interactions among leaders, followers, and the situation. Similarly, Gronn (2002) proposed distributed leadership as an expanded unit of analysis, arguing that conventional individual-centered constructs could not fully explain leadership functions shared by, or collectively performed by, multiple individuals within a group. Gronn (2008) later suggested that the term, hybrid leadership, may be a more appropriate descriptor, since it encompasses hierarchical and heterarchical elements, and allows individual and shared leadership to coexist.

While Spillane and Gronn conceptualize leadership as extending beyond individual actors, they differ in emphasis. Spillane's work is primarily concerned with leadership as practice, focusing on how leadership is enacted through interactions among

leaders, followers, and the situation. In contrast, Gronn's contribution shifts the unit of analysis toward the collective, emphasizing how leadership is coordinated and accomplished across groups. The present study aligns more closely with Spillane's practice-centered perspective, as it examines how informal faculty leadership is enacted in context. At the same time, Gronn's notion of collective and hybrid leadership remains relevant in recognizing that such practices do not occur in isolation but are embedded within broader organizational arrangements.

Theoretical Grounding

Distributed leadership provides the primary lens for understanding how leadership is enacted across actors and situations. While this perspective conceptualizes leadership as practice distributed across interactions, it is less explicit in examining how such practices are shaped within particular institutional conditions. This distinction is important for the present study, which builds on these conceptual foundations by examining how leadership is enacted within the institutional contexts in which faculty work.

Perspectives on learning offer additional context for interpreting how such practices develop. Social learning theory (Bandura, 1977) highlights how faculty learn and adopt practices through observation and interaction, while situated learning (Lave & Wenger, 1991) emphasizes how participation within academic communities shapes the development of practice and recognition. These perspectives are drawn on selectively to support the interpretation of how informal leadership practices develop and are taken up in context, while distributed leadership remains the primary lens guiding the analysis.

Strengths and Limitations

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Distributed leadership has been identified as particularly relevant in contexts of digital transformation, where expertise is dispersed and leadership responsibilities cannot be confined to formal roles (Harris et al., 2013). In such settings, distributing leadership can alleviate pressure on formal leaders while drawing on the collective expertise of faculty to support innovation in teaching and learning (Bush, 2013).

However, critics argue that distributed leadership can function as a camouflaged form of managerialism that delivers top-down policies while increasing teachers' workloads (Harris & DeFlaminis, 2016). Critics caution against assuming that distributed leadership is inherently enabling or that it operates through a fixed blueprint. Although certain principles and strategies appear effective in some contexts, distributed leadership does not operate through a standardized prescription or fixed model. Instead, it is more useful to attend to the institutional conditions within which distributed leadership is enacted.

Another misconception is that everyone leads in distributed leadership. On the contrary, leaders are those who are best equipped or skilled to do so, and “only by carefully building the capability and capacity of certain informal leaders in a school ... [can] positive progress be made” (Harris & DeFlaminis, 2016, p. 4). Evidence further suggests that in high-performing organizations, formal leaders prudently share authority and responsibility with “individuals who have the aptitude, ability and conviction to lead, at a particular time, within an organization” (p. 4).

These strengths and critiques point to a more qualified use of distributed leadership in the present study, one that attends not only to how leadership is enacted

across actors, but also to the institutional conditions under which such practice becomes possible, constrained, or sustained.

Distinguishing Distributed Leadership from Adjacent Leadership Constructs

Distributed leadership shares conceptual ground with several adjacent leadership constructs that move beyond hierarchical, leader-centric models. *Shared leadership* emphasizes horizontal influence within teams and the distribution of leadership roles among members (Pearce & Conger, 2003; Holcombe et al., 2021). Its analytic focus is the team as the primary locus of shared influence. *Collaborative leadership* foregrounds coordinated action and partnership across groups or institutional units in pursuit of shared goals (Ansell & Gash, 2008; Kezar & Lester, 2009). It centers on structured cooperation and interdependence across organizational boundaries. *Collective leadership* conceptualizes leadership as residing in the capacity of the group as a whole rather than in a single individual (Friedrich et al., 2009). Its emphasis lies in group-level capability and shared cognition. *Participative leadership* and *empowering leadership* focus on the involvement of members in decision-making processes and the development of autonomy within formal authority structures (Amundsen & Martinsen, 2014; Somech, 2005). These perspectives primarily foreground decision inclusion and psychological empowerment. While distributed leadership overlaps with these constructs in recognizing influence beyond formal hierarchy, it is distinguished by its explicit focus on leadership practice as enacted through interactions among leaders, followers, and situations within organizational contexts (Gronn, 2002; Spillane, 2006; Spillane & Timperley, 2004). In contrast to approaches that foreground teams, partnerships, group properties, decision

inclusion, or empowerment processes, distributed leadership foregrounds the interactional enactment of leadership practice within context.

This study adopts distributed leadership because of its explicit practice-centered orientation. Rather than confining analysis to bounded teams, formal decision-making structures, or group-level properties, distributed leadership conceptualizes leadership as practice stretched across leaders, followers, and situations within organizational contexts (Spillane, 2006; Spillane & Timperley, 2004). This perspective aligned with the present study's focus on informal faculty leadership in blended learning, where influence was enacted across roles, relationships, and institutional spaces rather than within fixed team structures. A practice-centered lens was particularly appropriate for this study, which examined how informal faculty leadership was enacted, recognized, and sustained under particular institutional conditions.

One way that leadership becomes distributed in practice is through the influence of informal leaders. This distinction matters because the present study was not primarily concerned with team dynamics, shared decision-making, or formal empowerment processes. Its focus was on how faculty exercised influence without positional authority and how that influence was taken up, negotiated, and sustained within institutional contexts. Distributed leadership was therefore the more appropriate frame, as it allowed attention to remain on leadership as practice while also accommodating the situational and relational conditions under which that practice unfolded.

Informal Leadership

Within the broader perspective of distributed leadership, informal leadership provides a lens for understanding how influence may be exercised by individuals who do

not occupy formal authority positions. Related forms through which such influence may appear in practice include emergent leadership and grassroots leadership in higher education contexts.

The concept of informal leaders has been documented in leadership literature as early as the 1950s, when Carter et al. (1951) examined individuals perceived as leaders in small, leaderless groups during emergent situations. Although informal leadership has long been acknowledged as an important element in organizational behaviour (Pielstick, 2000), leadership research has traditionally focused on individuals occupying formal authority roles (Banks et al., 2022; Leino, 2022).

Beginning in the 2000s, shifts toward collectivist, non-hierarchical, and multi-level approaches to leadership renewed scholarly interest in informal leadership (Batistič et al., 2017; Yammarino et al., 2012). Reflecting this growing attention, Leino (2022) conducted a systematic review of informal leadership research across six databases and seven disciplines. Notably, the review excluded several fields, including education. Nevertheless, Leino's synthesis of 85 studies provided conceptual clarity that remains relevant to educational contexts. Across disciplines, *informal leadership* is commonly defined in two ways: as leadership enacted as a dynamic social process, and as influence exercised without formal authority. These conceptualizations align with definitions found in educational research (Guy, 2005; Turner, 2013). In addition, management scholarship identifies related forms, such as emergent leadership, that illuminate how informal influence develops within groups.

Emergent Leadership

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Emergent leadership refers to situations in which individuals without formal authority are perceived by peers as exercising leaderlike influence (Hanna et al., 2021). It represents a form of informal leadership that arises in response to task demands or situational needs rather than positional designation. Acton et al. (2019) have described this process as being shaped by individual characteristics, relational dynamics, and contextual factors.

Hanna et al. (2021) further identified three defining features of emergent leadership: lateral influence; leadership originating from a particular group member rather than the group as a whole; and temporal variability, meaning that different members may assume informal leadership roles at different moments depending on situational demands. This implies that informal leadership is fluid, shifting across members as situations change.

In higher education contexts characterized by shared governance, professional autonomy, and distributed expertise, faculty members may assume influence informally in response to evolving institutional or pedagogical challenges, even in the absence of formal leadership roles. Emergent leadership therefore provides one way of understanding how informal faculty influence may develop within academic settings.

Informal Leadership in K-12

Across the field of education, however, informal leadership has been most extensively examined in K–12 settings. In the kindergarten-through-twelfth-grade (K–12) literature, teachers are distinguished from school administrators in terms of the focus and scope of their influence. Teachers are primarily responsible for the teaching–learning process within the classroom, while administrators are associated with leadership and

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management of the broader school environment (Danielson, 2007). Nevertheless, teachers who do not hold administrative roles may still be recognized as leaders under certain circumstances. In these cases, teacher leadership may take either formal or informal forms. While formal teacher leaders hold designated positions of authority, such as department chair or curriculum specialist (Gordon et al., 2021), informal teacher leaders

emerge spontaneously and organically from the teacher ranks. Instead of being selected, they take the initiative to address a problem or institute a new program. They have no positional authority; their influence stems from the respect they command from their colleagues through their expertise and practice. (Danielson, 2007, p. 16)

While the K–12 literature provides substantial insight into how informal leadership emerges among teachers, leadership dynamics in higher education operate within different institutional conditions. These differences have led scholars to examine bottom-up faculty influence through the lens of grassroots leadership.

Grassroots Leadership in Higher Education

Leadership operates differently in higher education because of several distinguishing institutional characteristics, including faculty autonomy, academic freedom, dual authority structures, decentralized departmental authority, and shared governance mechanisms (Kezar & Lester, 2011). Within this context, responsibility for decision-making on university matters is shared among faculty, administrators, and governing bodies.

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In the early 2000s, research began to document significant leadership occurring among faculty and staff outside formal authority positions (Kezar & Lester, 2011). At the time, scholarship on this form of influence was limited, and little was known about how bottom-up leadership efforts interacted with formal administrative structures. In response, Kezar and colleagues produced a substantial body of work examining grassroots leadership in higher education (Kezar et al., 2011; Kezar & Gehrke, 2013; Kezar & Lester, 2009).

Drawing on Meyerson and Scully's (1995) concept of tempered radicals, Kezar and Lester (2011) conceptualized grassroots leadership as non-hierarchical, collective, and non-institutionalized action undertaken by individuals without formal authority who mobilize others to advance change. Tempered radicals were organizational insiders who remained committed to their institutions while seeking to challenge or shift aspects of prevailing norms or practices. They were considered "radical" insofar as they held values or goals that may have diverged from dominant institutional expectations, yet "tempered" because they pursued change strategically and incrementally without severing their affiliation with the organization. These leaders operated from the bottom up while maintaining institutional loyalty and advocating shifts in norms, values, or practices. In higher education settings, such faculty leaders contributed by challenging revenue-driven priorities, promoting equity, strengthening collegial relationships, advancing student learning, and modeling alternative forms of leadership (Kezar & Lester, 2011).

While grassroots leadership scholarship often emphasizes reform-oriented or value-driven change across broad institutional domains, the present study focused on informal faculty leadership enacted within blended learning environments. Rather than

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centering activism or institutional reform agendas, this inquiry examined leadership embedded in pedagogical practice, peer support, and instructional coordination. The emphasis was on how faculty members exercised influence in the course of sustaining and developing blended learning within existing institutional structures. In this way, the study builds on grassroots scholarship while advancing a more domain-specific and practice-oriented account of informal faculty leadership in higher education.

Understanding how such leadership emerges and operates also required attention to the broader institutional conditions within which faculty work.

In this study, informal leadership was understood as influence enacted without formal authority within the everyday work of teaching and learning. Rather than being defined by designated roles, such leadership became visible in how faculty responded to instructional demands, supported colleagues, and contributed to the development of blended learning practices. This orientation directed attention to how influence was exercised within existing institutional arrangements and how it was taken up in practice, without assuming that such leadership was formally recognized or structurally secured.

Lewin's Model for Organizational Change

As introduced in Chapter 1, this study drew on Lewin's conceptualization of organizational change, particularly his formulation of force field analysis. This framework provided a way to examine the institutional conditions that shaped how informal faculty leadership operated within blended learning environments.

Lewin (1947) introduced field theory as a way of understanding social behaviour as a function of the total situation in which individuals and groups are embedded. The "field" refers to the dynamic psychological and social environment at a given moment,

encompassing the interrelated forces that influence behaviour. In this formulation, behaviour cannot be understood apart from the configuration of forces operating within the field.

Within this framework, social systems can be understood as existing in a state of what Lewin (1947) called *quasi-stationary equilibrium*. The term, quasi-stationary, indicates that stability in social systems is not fixed but maintained through the continuous interaction of opposing forces. At any point in time, patterns of behaviour appear stable because driving forces that promote movement and restraining forces that resist movement are held in relative balance (Lewin, 1951). In institutional contexts, these forces may take the form of policy mandates, leadership expectations, professional norms, resource conditions, institutional routines, or interpersonal dynamics. Stability therefore reflects the temporary containment of competing pressures within the social field rather than the absence of tension (Lewin, 1947, 1951).

Change, in Lewin's formulation, requires a shift in the level of equilibrium (Lewin, 1951). Such a shift may occur either by strengthening driving forces or by reducing restraining forces. Importantly, Lewin cautioned that intensifying pressure alone may heighten resistance and generate instability. More durable transformation is often achieved by identifying and addressing the sources of restraint within the social field. Resistance is therefore not treated as an external obstacle but as an inherent component of the field that interacts dynamically with forces supporting change (Lewin, 1951).

Lewin also described change through a three-stage heuristic of unfreezing, moving, and refreezing (Lewin, 1947, 1951). Unfreezing involves destabilizing the

existing equilibrium by weakening forces that maintain established patterns (Lewin, 1951). The movement stage entails adopting and testing new practices as the balance of forces shifts. Refreezing refers to the stabilization of new norms and routines at a reconfigured level of equilibrium. Although often interpreted as a linear sequence, these stages describe patterned shifts in equilibrium rather than a fixed progression, and they remain embedded within the broader logic of field theory (Lewin, 1951).

Lewin's model has, however, been critiqued for appearing overly linear and for assuming stable organizational contexts that may not reflect contemporary environments characterized by continuous change. In response to such critiques, Burnes (2004a, 2004b) argued that many interpretations oversimplify Lewin's work by detaching the three-stage model from its grounding in field theory and equilibrium logic. Burnes contended that Lewin's concept of quasi-stationary equilibrium anticipates ongoing adaptation and does not presume permanent stability. Rather than proposing rigid sequential steps, Lewin's framework describes shifts in the balance of forces within complex social systems. This reinterpretation reinforces the continued relevance of Lewin's equilibrium model for analyzing change in contemporary institutional settings, particularly where institutional conditions, competing pressures, and uneven stabilization processes interact.

Together, these elements provide a coherent framework for understanding change as a socially situated and structurally conditioned process. In the context of higher education, this framework offers a structural lens for examining how institutional forces shape the conditions under which change initiatives and leadership practices unfold.

In this study, Lewin's framework was used as a sensitizing lens for examining how institutional conditions shaped the enactment of informal faculty leadership in

blended learning in the university system under study. The focus was on how supports and constraints interacted within institutional contexts and how these conditions influenced what faculty could do in practice. This perspective made it possible to consider how leadership was taken up, sustained, or limited within the shifting balance of forces that characterized blended learning environments within the university system.

Conceptual Framework

The conceptual framework of the study is presented in Figure 1. The framework illustrates the relationships among key concepts that guided the study and how these relationships informed the research questions and analysis. As shown in the diagram, advances in digital technology contributed to the digital transformation of higher education which, particularly in the context of the COVID-19 pandemic, accelerated the nationwide adoption of blended learning in Philippine higher education institutions. This shift was understood in the framework as a process of educational change. Drawing on Fullan (2015), the framework highlighted that such change required both leadership and capacity-building, positioning them as central enabling elements in implementing and sustaining blended learning.

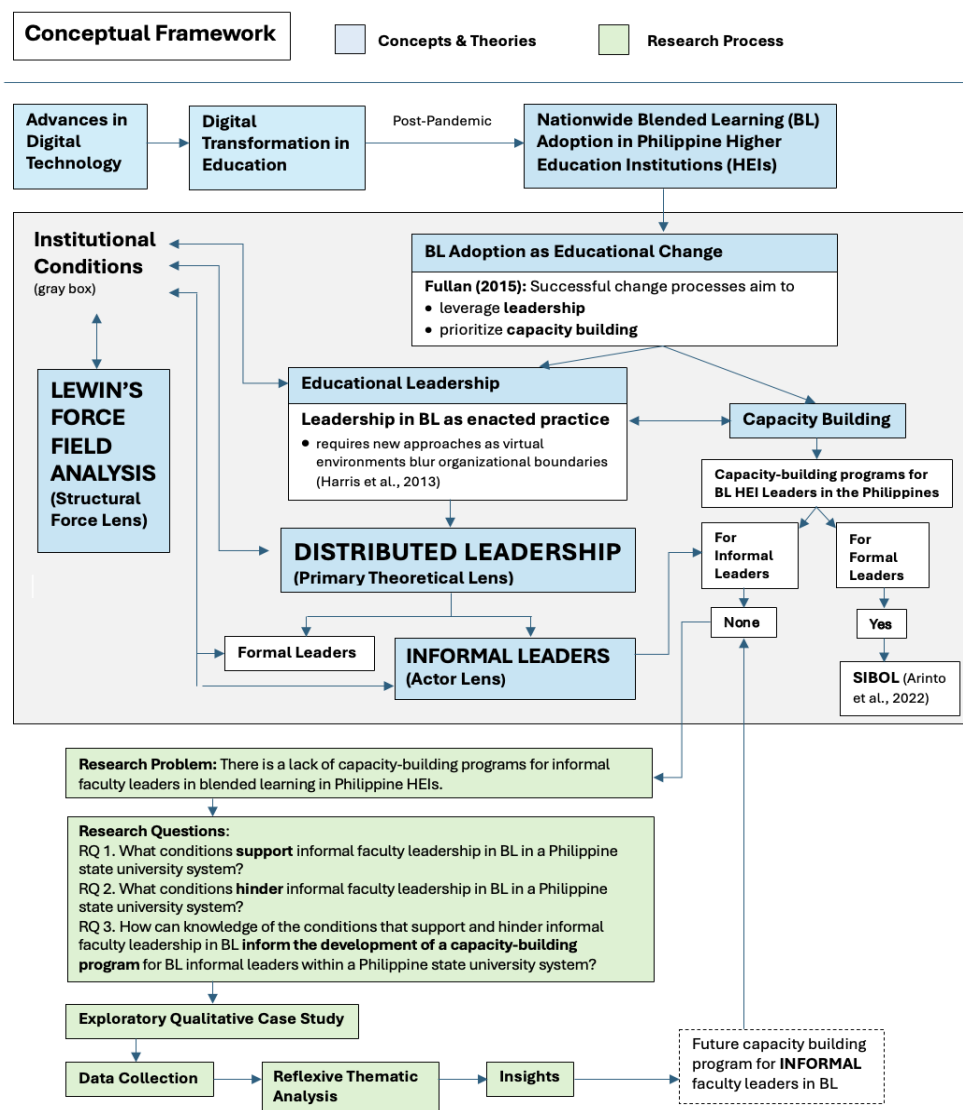
Within this process, leadership in blended learning was conceptualized as enacted practice. Distributed leadership provided the primary lens for understanding how leadership was accomplished through interactions among multiple actors rather than confined to formal roles. Spillane's (2006; Spillane & Timperley, 2004) conception of leadership as practice emphasized interactions among leaders, followers, and the situation. In this study, these situations were understood as shaped by broader institutional conditions, which influenced how leadership was enacted in practice and

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what forms of practice became possible. Within this broader perspective, the study focused on informal faculty leaders as the primary actors through which such leadership was examined. This actor-focused lens directed attention to how influence was exercised without formal authority and how it was taken up in practice.

Figure 1

Conceptual Framework for the Research Study



The framework also situated these leadership practices within institutional conditions, represented in the diagram as the gray box. Within the framework, institutional conditions were understood as shaping, enabling, and constraining the enactment of leadership practice. In this way, the framework did not treat conditions as background context alone, but as analytically central to understanding how informal faculty leadership was exercised and how it was taken up in practice. Drawing on Lewin's force field analysis, these conditions were understood as the dynamic interaction of forces that supported or constrained practice. This perspective directed the analysis toward identifying the conditions that supported or hindered informal faculty leadership in blended learning and examining how these conditions shaped what faculty could do in practice.

The capacity-building component of the framework highlighted a gap between existing programs and the needs of informal faculty leaders. While capacity-building initiatives were present for formal leaders, the absence of comparable programs for informal leaders was identified as the central research problem of the study. This gap provided the basis for examining how institutional conditions and leadership practices could inform the design of capacity-building initiatives for informal faculty leaders.

These relationships were taken up directly in relation to the research questions. Research Questions 1 and 2 examined the institutional conditions that supported and hindered informal faculty leadership in blended learning, informed by Lewin's emphasis on enabling and constraining forces, and interpreted in relation to how leadership is enacted in practice through distributed leadership. Research Question 3 built on this

analysis by considering how knowledge of these conditions could inform the development of capacity-building programs for informal faculty leaders.

In this way, the conceptual framework functioned as an analytical guide rather than a descriptive model. It directed attention to how leadership was enacted, by whom, and under what conditions, and informed how patterns were interpreted across the data. Rather than serving as a set of predetermined categories, it operated as a sensitizing structure that supported the analysis of how informal faculty leadership was shaped, sustained, and constrained within institutional contexts. Its role over the course of the study is discussed further in Chapter 6.

Summary

In this chapter, I reviewed scholarship relevant to the study and established the conceptual foundations guiding the analysis. I began by situating blended learning within broader processes of educational change associated with digital transformation, while also attending to how advances in digital technology and pandemic-related disruptions shaped its adoption in higher education. While the blended learning literature examined in this chapter had much to say about institutional digital capacity, infrastructure, and pedagogical design, less attention was given to how leadership was enacted within these conditions, particularly by faculty who influenced practice without formal authority.

Attention then turned to leadership in educational change, where I engaged with distributed leadership as the primary perspective informing the study. From this perspective, leadership was understood as enacted through interactions among multiple actors within specific contexts. Building on this, I introduced informal leadership as a lens for examining how influence may have been exercised beyond formal authority,

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with emergent leadership and grassroots leadership providing additional context for how such influence developed in educational settings.

I subsequently introduced Lewin's force field analysis as a structural lens for examining the institutional conditions that shaped leadership practice. This perspective highlighted how enabling and constraining forces interacted to influence what was possible in practice. Taken together, these strands of literature positioned informal faculty leadership in blended learning as practice enacted within, and shaped by, institutional conditions.

I then presented the conceptual framework, which synthesized these relationships by linking digital transformation, educational change, leadership, capacity building, and institutional conditions in relation to the research questions. In doing so, I positioned the framework not simply as a visual summary of concepts, but as an analytical structure for interpreting how leadership was enacted, by whom, and under what institutional conditions. The framework was used to examine how informal faculty leadership was enacted, the conditions that supported or hindered it, and how these insights informed capacity-building efforts.

The next chapter builds on this foundation by outlining the research design and methodological procedures I used to examine these relationships in practice.

Chapter 3. Methodology

Introduction

In this chapter, I situate the inquiry within my research paradigm, worldview, and positionality. I then present the methodological approach, including the rationale for its selection and a brief discussion of alternative approaches considered. The case study design and procedures for participant recruitment and selection are described next, followed by the data collection methods, data management, and ethical considerations. I conclude with an overview of the analytic process and a summary that prepares the reader for Chapter 4.

Research Paradigm

A research paradigm is a framework grounded in a set of philosophical beliefs about systematic inquiry (Mertens, 2012). It includes the researcher's assumptions about several core elements: the nature of reality (ontology), the nature of knowledge (epistemology), the methods for acquiring knowledge (methodology), and the researcher's values (axiology; Ayton & Tsindos, 2023). Researchers articulate their paradigm at the outset because it “sets down the intent, motivation and expectations for the research” (Mackenzie & Knipe, 2006, p. 2) and guides the choice of methodology, methods, and research design.

I situated this study within a constructivist paradigm, where knowledge and meaning are socially constructed and shaped by individual experiences (Denzin et al., 2023). Within this paradigm, realities are understood to be multiple, as participants interpret the world through their social and cultural contexts. This perspective guided my interpretation of participants' accounts of informal faculty leadership in blended learning.

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In the next sections, I discuss my philosophical assumptions in relation to ontology, epistemology, and axiology.

Ontology

Ontology refers to the nature of reality or existence and concerns how one's understanding of reality shapes what can be known about the world (Moon & Blackman, 2014). I adopted a relativist ontological position, which assumes that social reality is neither singular nor objective but shaped by individual and contextual experiences. Multiple interpretations of reality may exist because faculty members understand the world through their own experiences and social contexts. Within this perspective, study participants held different interpretations of how conditions supported or constrained informal leadership in blended learning. I explored these interpretations through participants' accounts and analytic engagement with the interview data.

Epistemology

Epistemology concerns the relationship between the knower and what can be known, focusing on how knowledge is understood and produced (Denzin et al., 2023; Moon & Blackman, 2014). This study was situated within a constructivist paradigm and employed an interpretivist analytic approach to participants' accounts of their experience. Within this perspective, knowledge was understood as constructed through interaction between the researcher and participants rather than discovered as an objective reality.

From this perspective, meanings associated with leadership practices and institutional conditions were constructed through engagement with participants' accounts and my analytic interpretation. This position aligns with a relativist view of social reality, recognizing that multiple interpretations of informal leadership and institutional conditions may coexist across participants and contexts.

Axiology

Axiology concerns the role of values in research and how they shape the ethical dimensions of inquiry (Pretorius, 2024). It encourages researchers to consider how their beliefs, assumptions, and experiences may influence the design, conduct, and interpretation of a study. While some research traditions aim for value-free inquiry, qualitative research generally recognizes that values inevitably shape the research process. Researchers' perspectives and experiences influence how research questions are framed, how participants' accounts are interpreted, and how meaning is constructed from the data. Rather than attempting to eliminate these influences, qualitative researchers emphasize reflexivity and transparency about the researcher's role in interpretation.

In this study, I drew on my professional experience in blended learning and higher education as I engaged with participants' accounts. I remained attentive to how my assumptions and positionality shaped my interpretation of participants' perspectives and the meanings developed. I therefore approached the analytic process reflexively, acknowledging that interpretation was situated within my perspective while remaining grounded in participants' accounts.

In the following section, I reflect on my positionality in relation to the inquiry and the philosophical assumptions that informed this study.

Researcher Positionality

I am a female, cisgender, married, late-career academic born and raised in the Philippines. I am bilingual in English and Filipino, which supported rapport with participants and sensitivity to linguistic and cultural nuances. I hold a master's degree in distance education and am pursuing a doctoral degree in the same field, having transitioned to distance education after

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three decades as a licensed medical specialist. I am currently a tenured faculty member at a public university in the Philippines that offers undergraduate and graduate programs in education through online instruction. I previously held a senior academic leadership role at this university.

My research background spans both quantitative and qualitative methodologies. I worked as a vaccine clinical trial researcher for thirteen years using quantitative methods, while my later work in education used qualitative approaches. Given my longer background in quantitative research, I consider myself a novice in qualitative research and case study methodology.

I undertook this research as part of my doctoral studies in distance education at an online Canadian university. Because my education was largely supported by government subsidies at a public university, I sought to conduct research that could benefit my institution and the broader educational community. I was also part of the team that conceptualized, developed, and delivered SIBOL, the exploratory national capacity-building program for formal leaders in blended learning referenced in this study.

As a faculty member within the same university system in which the study was conducted and working in the field of distance education, I occupied a partial insider position connected to the phenomenon examined in this study. Through my experience in blended and online learning, I became familiar with the institutional contexts in which informal faculty leadership develops. This familiarity helped me build access and rapport with participants yet also required reflexive awareness of how professional proximity might shape my interpretation of participants' accounts.

My professional status as a tenured faculty member and medical specialist also positioned me as a senior academic relative to some participants. I remained mindful that these forms of professional authority could influence how participants perceived me and how openly they

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discussed institutional experiences. My prior involvement in blended learning initiatives, including participation in national capacity-building programs, may also have shaped my assumptions regarding the value of blended learning and the role of faculty leadership in supporting its implementation.

I also recognized that my ethno-racial and academic background, together with my identities as a daughter, wife, mother, medical doctor, academic instructor, and distance learning researcher, influenced my research decisions and interpretations of participants' accounts, particularly in relation to informal leadership and blended learning.

Research Methodology

This study was designed as an exploratory inquiry into an area where empirical research remained limited. I used a qualitative case study design, combined with reflexive thematic analysis, to examine how informal faculty leaders in blended learning described and interpreted the conditions that supported or hindered their work within a single university system.

In the following section, I introduce the case study methodology and explain the rationale for its selection.

Overview of Case Study Methodology

In research, the term, case study, can refer to a methodology and a method (Cohen et al., 2018). As a methodology, case study refers to a comprehensive research approach that informs the overall study design and shapes decisions related to case selection, data collection, and analytical strategies. In this role, the case study provides a framework for examining a bounded case and focusing the inquiry.

Description. Merriam (2009) defines a *case study* as “an in-depth description and analysis of a bounded system” (p. 40). Creswell (2019) further explains that *bounded* means “the

case is separated out for research in terms of time, place, or some physical boundaries,” and that a bounded system may refer to “an activity, event, process, or individuals” (p. 477). In this study, the bounded system served as the unit of analysis defining the scope of the inquiry (Merriam, 2009). By focusing on a bounded case, I examined how multiple institutional and contextual conditions shaped the phenomenon under study.

Rationale for Selection. The selection of a case study methodology was guided by conceptual and practical considerations. I assumed that blended learning practices and the enactment of informal faculty leadership occurred within a specific institutional context. I also assumed that those influenced by this leadership, including peer faculty members, were situated within the same institutional context. Taken together, these assumptions positioned informal faculty leadership in blended learning as a context-bound phenomenon, making a case study approach appropriate. The case study design supported the generation of insights into informal faculty leadership in blended learning and its implications for capacity building. The focus of the study was therefore on the phenomenon rather than the case itself, with the aim of developing insights that may inform understanding in similar higher education contexts.

Because the leadership dynamics under investigation were embedded in institutional structures, policies, and everyday practices, examining them within a bounded university context allowed me to interpret these dynamics in relation to the conditions in which they occurred.

Alternative Methodologies Considered. In identifying the most appropriate methodology for this study, I considered two alternative qualitative approaches: grounded theory and interpretative phenomenological analysis (IPA). In this section, I explain why I considered these approaches but ultimately selected a case study design.

Grounded Theory. I initially considered grounded theory for three reasons. First, grounded theory is a well-established methodology for examining how individuals perceive and make sense of their realities (Cullen & Brennan, 2021). Second, because grounded theory emphasizes generating theory rather than testing pre-existing theories, it is often used in research areas with limited theoretical development. Third, grounded theory offers a well-developed set of procedures for data collection and analysis (Cullen & Brennan, 2021).

However, I did not select grounded theory because it typically requires extensive data collection across multiple sources and longer time frames (Cullen & Brennan, 2021), which did not align with the scope and timeline of this doctoral research.

Interpretative Phenomenological Analysis (IPA). I considered IPA for two reasons. First, IPA focuses on understanding how individuals make sense of their lived experiences and how these experiences shape their thoughts, emotions, and behaviours (Miller & Barrio Minton, 2016). Second, its idiographic orientation emphasizes detailed exploration of individual cases and foregrounds the researcher's interpretive role in examining how participants make sense of their experiences.

Despite these strengths, I did not select IPA because of its focus on individual lived experience. In this study, I sought to examine individual experiences as situated within broader organizational and institutional contexts. This focus on contextual conditions was better addressed through a case study approach.

Designing the Case Study

Methodologists do not fully agree on how case studies should be designed and implemented (Yazan, 2015). Among case study scholars, Robert Yin (2014), Sharan Merriam (1998), and Robert Stake (1995) are widely recognized for offering distinct perspectives suited to

different research purposes and contexts. I drew on insights from their work to inform the design choices for this study.

Comparative Overview of Case Study Approaches. Stake's approach to case study research is constructivist and naturalistic, emphasizing in-depth interpretation of a case within its real-world context (Yazan, 2015). His work highlights flexible research design and the use of qualitative methods such as interviews, observations, and documents. Stake also emphasizes triangulation and the inclusion of multiple perspectives to capture the complexity of the case.

Merriam's interpretivist approach similarly focuses on understanding how individuals make sense of their experiences. Her work offers practical guidance for qualitative case study research, including procedures for data collection and analysis. Like Stake, Merriam draws on qualitative sources of evidence, commonly including interviews, observations, and documents (Yazan, 2015).

Yin's approach to case study research is often characterized as post-positivist, with greater emphasis on structure, design, and methodological rigor (Harrison et al., 2017; Yazan, 2015). Yin advocates the use of multiple sources of evidence and articulates the concept of analytic generalization, in which case study insights are linked to existing theory or conceptual frameworks rather than generalized statistically to populations (Yin, 2014).

Deciding on the Case Study Approach. In deciding on the case study approach, I reviewed seminal works by three leading case study methodologists: Stake (1995), Merriam (1998), and Yin (2014). Their work offered complementary perspectives on qualitative case study research and informed key methodological decisions in this study.

After reviewing these approaches in relation to the study's objectives, I integrated selected elements from the work of Stake (1995), Merriam (1998, 2009), and Yin (2014). Rather

than adopting a single methodological framework, I drew on complementary aspects of these scholars' approaches to inform the case study's conceptual orientation, qualitative practices, and structural design. The following sections explain how each perspective informed specific aspects of the case study design.

Stake's Contributions to the Case Study Design. Three aspects of Stake's work informed this study's design.

First, Stake's (1995) distinction between intrinsic and instrumental case studies shaped the study's methodological direction. Stake explained that an intrinsic case study is undertaken because the case itself is of primary interest, whereas an instrumental case study uses the case to explore a broader issue or refine conceptual understanding. This distinction addressed an early concern that selecting The University System as a bounded case might shift attention toward the institution itself rather than the research problem.

By framing the research as an instrumental case study, I used the institutional context to examine the broader phenomenon of informal faculty leadership in blended learning rather than to produce a comprehensive account of The University System as an organization. This perspective supported the use of The University System as a bounded case, not because of its uniqueness, but because it provided a setting in which conditions that supported or hindered informal leadership in blended learning could be examined and used to inform capacity-building.

Second, Stake (1995) emphasized the role of issues in shaping the conceptual structure of a case study. In Stake's formulation, case study inquiry begins with an issue, understood as a problem or concern that gives direction and focus to the study. Issues are embedded in context, and issue-based questions help organize the examination of a case.

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In this study, the central issue concerned the limited institutional support and capacity building available for informal faculty leaders in blended learning. The research questions were developed in response to this issue. In the first two questions, I inquired about conditions that supported or hindered informal leadership. These questions provided the foundation for the third question, in which I asked how understanding these conditions might inform the development of a capacity-building program. Considered together, the questions linked the case to the central issue and moved from description toward interpretation, consistent with Stake's approach.

Finally, Stake's (1995) work informed the use of multiple sources of evidence. Stake emphasized drawing on multiple forms of evidence to capture the complexity of a case while maintaining a holistic perspective. In this study, interviews served as the primary source of data and were complemented by documentary materials and institutional records.

Stake (1995) also described two analytic strategies: categorical aggregation, which involves identifying patterns across instances, and direct interpretation, which focuses on deriving meaning from individual instances. Although reflexive thematic analysis served as the primary analytic approach, Stake's emphasis on aggregation and interpretation aligned with how I examined patterns across participants' accounts and interpreted meaning within individual accounts of informal leadership. Stake's perspective supported an analytic process grounded in participants' perspectives while remaining attentive to the broader issue of institutional support for informal faculty leadership in blended learning.

Merriam's Contributions to the Case Study Design. Merriam's (1998, 2009) work informed this study through her clear and practical guidance on the design and conduct of qualitative case studies in educational research. In particular, Merriam's discussions of the role

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of theory in case study research, the use of interviews and documents as data sources, and considerations of credibility and dependability were especially relevant.

According to Merriam (1998), a researcher's worldview, or theoretical orientation, shapes all stages of a study, from the identification of the research problem to the interpretation of participants' accounts. Theory provides a way of organizing evidence and linking concepts so that patterns and relationships can be interpreted. In this study, theoretical perspectives drawn from distributed leadership, informal leadership, and Lewin's force field framework informed how I interpreted conditions that supported or hindered informal faculty leadership in blended learning.

Merriam (1998) identified interviews and documents as key sources of data in qualitative case study research. In this study, semi-structured individual and focus group interviews served as the primary source of data and were supplemented by documentary materials on blended learning initiatives within the university system. Semi-structured interviews allowed me to explore participants' perspectives while maintaining flexibility to probe, clarify, and follow up on responses. Documentary sources included policy memoranda, public records, and institutional materials related to blended learning initiatives. When considered together, interviews and documents supported triangulation by allowing comparison of evidence across sources and situating participants' accounts within their institutional context.

Another contribution of Merriam's work concerned the treatment of validity and reliability in qualitative research, where credibility and dependability were reframed within a broader framework of trustworthiness.

Credibility refers to the extent to which interpretations meaningfully reflect participants' perspectives and the realities of the setting (Merriam, 1998; Tisdell et al., 2025). In this study,

credibility was supported through triangulation across individual interviews, the focus group, and documentary sources. Member checking, attention to contextual detail, and reflexive engagement further supported credibility.

Dependability refers to the transparency and coherence of the research process rather than the replication of findings (Merriam, 1998). To support dependability, I documented analytic decisions related to coding and the construction of patterns of meaning to establish an audit trail. I also maintained a case study database to organize transcripts, notes, and analytic materials.

Although Merriam also discusses *transferability* alongside credibility and dependability, referring to it as the extent to which findings may be applicable to other contexts, this study prioritized contextualized interpretation within the bounded case. This approach allows readers to consider how the insights may inform understanding of similar educational settings.

Yin's Contributions to the Case Study Design. Yin's (2014) approach informed the design of this study, particularly in relation to the overall structure of the case study and the organization of the research process (Mott & Haddad, 2025).

One of the most influential aspects of Yin's work was his operational definition of a *case study*:

A case study is an empirical inquiry that investigates a contemporary phenomenon (the "case") in depth and within its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident. A case study inquiry copes with the technically distinctive situation in which there will be many more variables of interest than data points and therefore relies on multiple sources of evidence, with data converging through triangulation, and benefits from the prior development of theoretical propositions to guide data collection and analysis. (Yin, 2014, p. 16)

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This definition highlighted two considerations that guided the study design.

First, the phenomenon of informal faculty leadership in blended learning within the Autonomous Universities could not be meaningfully separated from the broader institutional context of the university system. For this reason, a single-case study approach was appropriate.

Second, informal faculty leadership within a single university system represented a complex real-world situation. The study drew on participants' accounts from multiple universities and engaged with several interacting institutional conditions, including policies, organizational structures, and academic cultures. At the same time, the analysis remained centered on a single bounded case. Within this complex situation, the case study used strategies that supported a holistic understanding of the case. These included triangulation, cross-participant comparison, and a study proposition that focused the inquiry without functioning as a deductive frame for analysis.

Although the study focused on a particular phenomenon, informal faculty leadership in blended learning, this phenomenon was examined within the bounded context of a single university system. The case study design enabled analysis of how this phenomenon was shaped by institutional structures, policies, and conditions unique to the case.

Another important contribution of Yin's work concerned the types of case study design he described. Yin's design matrix distinguished between single-case and multiple-case designs, each of which may be either holistic (i.e., a single unit of analysis) or embedded (i.e., multiple units of analysis; Yin, 2014). I used a single-case design with embedded subunits because it aligned with the structure of The University System, where multiple autonomous universities functioned as subunits within the larger institutional case. The study examined informal faculty leadership in blended learning across eight autonomous universities within the system, allowing

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additional layers of analysis at the subunit level while maintaining the university system as the primary unit of analysis.

Finally, Yin's work also identified five key components of case study research design (Yin, 2014, p. 44):

1. A case study's questions
2. The study's propositions, if any
3. Its unit(s) of analysis
4. The logic linking the data to the propositions, and
5. The criteria for interpreting the analysis.

These design components helped organize the study.

The following section presents the key elements of the case study design and explains how I operationalized the components in this research.

Key Elements of the Case Study Design

Case Study Questions. The case study research questions were first introduced in Chapter 1:

RQ 1. What conditions supported informal faculty leadership in blended learning within a Philippine state university system?

RQ 2. What conditions hindered informal faculty leadership in blended learning within a Philippine state university system?

RQ 3. How can knowledge of the conditions that supported or hindered informal faculty leadership in blended learning inform the development of a capacity-building program for informal leaders within a Philippine state university system?

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In crafting these research questions, I combined “what” questions typical of exploratory inquiry in relatively underexplored areas with a “how” question focused on insights from the study that could inform capacity-building efforts. This structure was consistent with case study research that examined contemporary phenomena within real-world contexts over which the researcher has little or no control (Yin, 2014, p. 25).

The term, informal faculty leadership, situated the study within a higher education context and distinguished it from teacher leadership, which is more commonly associated with K–12 settings (Guy, 2005; Turner, 2013).

Garrison and Kanuka’s (2004) seminal definition of *blended learning* as “the thoughtful integration of classroom face-to-face learning experiences with online learning experiences” (p. 96) was adopted as the study’s working definition. Although more recent models of blended learning include bichronous approaches that combine asynchronous and synchronous modalities (Cleveland-Innes & Wilton, 2018; Martin et al., 2023), this foundational definition was retained because it reflected how blended learning was understood and implemented in the Philippine context (Arinto et al., 2022).

Study Proposition. According to Yin (2014), a proposition in case study research is a foundational statement that identifies areas or relationships to be examined. It narrows the focus of the inquiry and helps the researcher determine what evidence to seek and how the phenomenon will be explored. Propositions support case study design by guiding data collection, indicating which evidence is relevant, and contributing to the development or refinement of theory. Although propositions are not required in all studies, even exploratory case studies benefit from a clear statement of the inquiry’s aim and direction (Yin, 2014).

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This case study was conceptually informed by a proposition that contextual conditions shaped how informal faculty leaders provided direction and exercised influence among peers in blended learning practice. Support for examining contextual conditions appears in the literature, particularly in the work of Thomas and Willcoxson (2009), Kezar and Lester (2009), and Kezar et al. (2011), who identified institutional actions and campus-level environmental factors as enabling grassroots faculty leadership. Esen et al. (2020) noted that this body of scholarship situates grassroots leadership as distinctive within higher education contexts.

The proposition focused attention on the institutional conditions surrounding informal faculty leadership and informed the development of the research questions and interview prompts. However, it did not function as a coding frame during analysis. In this sense, the proposition functioned as a sensitizing concept that oriented attention to potential relationships within the data, while remaining open to revision as patterns of meaning were constructed through analysis. Consistent with reflexive thematic analysis, patterns of shared meaning were constructed through iterative engagement with participants' accounts.

Unit of Analysis. The unit of analysis and bounded case for this study was a large, multi-campus public university system in the Philippines established through enabling legislation (University of the Philippines Charter, 2008). The University System comprised nine autonomous universities distributed across the country, although one was excluded because its fully online instructional model did not meet the study's blended-learning inclusion criteria. The University System provided a single institutional context within which informal faculty leadership in blended learning was examined.

The selection of The University System as the bounded case was guided by several considerations. First, its geographically distributed autonomous universities represented diverse

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regional contexts and institutional settings within a single system. Second, I was a faculty member at one autonomous university within the system at the time the research was conducted, which provided familiarity with institutional structures and procedures, including those related to ethics review, study permissions, and participant recruitment. My home university was excluded because it operated as a single-mode distance learning institution that did not meet the blended-learning inclusion criteria. Finally, the use of a single university system provided a practical setting in which the study's insights could inform the development of a capacity-building program. Any such program may be piloted within The University System and, where appropriate, adapted for use in other higher education institutions in the Philippines.

The bounded case used the masked institutional label *The University System*. The masking was used to direct attention to the institutional dynamics examined in the study rather than to the institution's name. Given the system's distinctive structure, full anonymity could not be assured.

Within this bounded case, eight autonomous universities served as embedded subunits, each headed by a chancellor. Individual autonomous universities were identified using lettered designations (e.g., University A, B, C) to maintain institutional confidentiality. Each autonomous university comprised multiple colleges and institutes collectively referred to as degree-granting units. Faculty participants were drawn from these units, providing variation in disciplinary contexts and instructional practices while remaining within a single institutional system.

Logic Linking the Data to the Proposition. This design component prompted me to consider how the interview data would be analyzed in relation to the study's conceptual focus (Yin, 2014). In this study, the guiding proposition focused attention on contextual conditions that supported or hindered informal faculty leadership in blended learning. The choice of reflexive

thematic analysis allowed me to explore and interpret interview data in relation to informal leadership and the institutional contexts in which these experiences occurred. My insights from these interpretations are presented in Chapter 4.

Criteria for Interpreting the Findings. In case study research, interpretation involves analytic judgment developed through systematic engagement with the data (Yin, 2014). In this study, interpretation was guided by principles commonly associated with reflexive thematic analysis (Braun & Clarke, 2022), including careful engagement with the full range of participants' accounts, consideration of multiple interpretive possibilities, and sustained attention to the central phenomenon under investigation. These principles supported interpretations grounded in participants' accounts while remaining attentive to alternative understandings of the conditions shaping informal faculty leadership in blended learning. The analytic interpretation was also informed by relevant scholarship and familiarity with the institutional context.

Ethical and Institutional Approvals

Prior to participant recruitment, I obtained ethics approval from Athabasca University, my doctoral institution, and the university system in the Philippines where the study was conducted. Approval was first secured from the Athabasca University Research Ethics Board (AU REB) for research involving human participants conducted in accordance with the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (Canadian Institutes of Health Research et al., 2022).

Following AU REB approval, ethics clearance was obtained in the Philippines through a Research Ethics Committee within The University System that was accredited by the Philippine Health Research Ethics Board (PHREB, 2016). The study was reviewed and approved as minimal-risk social science research. Approval from this local ethics committee facilitated ethics

clearance across participating autonomous universities within The University System (Appendix I).

Once ethics clearance was obtained, I requested permission to conduct the study from the chancellor of each autonomous university. Chancellor approval was required prior to participant recruitment and was granted only after ethics clearance had been secured (Appendix I).

Participant Recruitment

I employed a two-stage participant recruitment process: (1) a nomination phase, in which faculty members nominated potential study participants, and (2) an invitation phase, in which eligible nominees were formally invited to participate in the study. In this section, I explain the process for inviting nominators and participants, including communication protocols, eligibility criteria, recruitment strategies, materials, and related logistical considerations.

Communication Protocols

Within The University System, research-related activities were conducted through established institutional communication channels. These channels required that correspondence follow recognized pathways so that requests were appropriately directed and aligned with institutional protocol. Adherence to these procedures ensured that recruitment communications were appropriately authorized and distributed through the institution's established channels.

In this study, faculty nominators were invited through email communication initiated with the Office of the Chancellor (OC), in accordance with The University System's protocol. Depending on the autonomous university, the request was typically routed through the Office of the Vice-Chancellor for Academic Affairs (OVCAA) or, in some cases, directly through

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academic unit heads, such as college deans or institute directors. When routed through the OVCAA, the invitation was forwarded to unit heads, who then shared it with their faculty members. At universities that routed the nomination through deans, I emailed unit heads directly to request dissemination.

This stepwise process reflected the established communication chain within The University System. All research-related emails were sent using the official faculty email system, which is Gmail-based, and integrated with the university system's Google Workspace.

These communication procedures provided the foundation for the recruitment strategies described in the following section.

Recruitment Strategy

Study participants were recruited indirectly through an initial nomination procedure that reflected recognition of faculty members' influence in blended learning practice. Faculty members from eligible autonomous universities of The University System were invited to recommend colleagues recognized as informal leaders in blended learning as potential study participants. These faculty were provided with eligibility criteria to guide their recommendations.

Eligibility Criteria

Eligible study participants were faculty members within The University System who met the study's operational definition of informal leadership in blended learning. Eligibility was determined using inclusion and exclusion criteria designed to ensure that participants were engaged in blended learning practice and did not hold formal leadership roles. The criteria also ensured that participants were situated within the bounded institutional case and had been

recognized by peers as influencing blended learning practice. Table 1 presents the eligibility criteria used in participant selection.

Table 1

Eligibility Criteria for Identifying Study Participants

Criterion Category	Inclusion Criteria	Exclusion Criteria	Rationale
Institutional Affiliation	Faculty member (regular or non-regular) authorized to teach within The University System.	Not affiliated as faculty within the bounded case.	Ensured participants were situated within the bounded institutional case.
Teaching Level and Context	Teaches at the undergraduate (e.g. bachelor's or associate programs) or graduate level (e.g. graduate certificate, diploma, master's or doctoral programs) in an autonomous university within The University System (excluding the fully online university).	Not teaching at tertiary level within the bounded case.	Maintained focus on higher education teaching contexts relevant to the study.
Blended Learning Experience	Currently or previously taught using blended learning, defined as a combination of in-person and online instruction	Has taught exclusively online or exclusively in-person	Ensured participants had direct experience integrating both in-person and online instructional modalities central to blended learning.
Nomination-Based Identification of Informal Leadership	Identified through peer, administrator, or self-nomination as providing direction or influence in blended learning practice within The University System.	Not identified through the nomination process.	Ensured alignment between participant selection and the study's operational definition of informal leadership.
Formal Leadership Status	Does not hold a formal administrative or authority position within The University System (e.g., chair, dean, director, chancellor, vice chancellor, or their appointed assistants).	Currently holds formal leadership or administrative role.	Prevented conflation of informal leadership with the positional authority of formal leadership
Committee Leadership	Does not serve as chair or leader of a blended learning or	Currently leads blended learning or educational	Avoided inclusion of individuals with formally designated blended learning authority.

Criterion Category	Inclusion Criteria	Exclusion Criteria	Rationale
	educational technology committee.	technology committee.	

Recruitment Tools

Nominators were invited using a multimedia approach that involved three communication tools: an email invitation, a digital poster, and a short informational video.

Email Invitation. An email invitation was sent to faculty members inviting them to nominate colleagues whom they considered to be informal faculty leaders in blended learning to participate in the study. The email provided a brief overview of the ethics-approved study, introduced me and outlined my role as well as that of my supervisor, university, and the faculty, and highlighted potential benefits for faculty, the institution, and the broader academic community. It provided a link to the Nomination Portal, which contained instructions for the nomination process. Details of the nomination process are provided in the section on the Nomination Phase.

The nominator invitation was based on the Invitation to Participate template recommended by the AU Research Ethics Board (Athabasca University, 2021a) and adapted for this study. A copy of the email invitation used to recruit nominators is included in Appendix A.

Digital Poster. A digital poster was also designed to promote the study and encourage nominations as a visual supplement to the email invitation. Based on the AU Recruitment Poster Template (Athabasca University, 2024), the poster briefly outlined the study purpose, eligibility criteria, participation requirements, and my contact information. It was disseminated through institutional communication channels and posted on the nomination website. A detailed description of the poster content is provided in Appendix B.

Informational Video. The final recruitment tool was a short informational video explaining the study and inviting faculty to participate as nominators. It supplemented the email invitation and digital poster through visual and audio elements. The video was developed from a PowerPoint slide presentation recorded on Zoom and exported as a video file. It ran for no more than two minutes and was saved in MP4 (1080p) format with medium compression to minimize loading and delivery issues. The video was shared through institutional communication channels and the nomination website. Details of the storyboard and voiceover script for the informational video are presented in Appendix C.

All recruitment materials were reviewed and approved by the AU Research Ethics Board and The University System Research Ethics Board prior to dissemination. The approved versions are included in the appendices. These materials formed part of the structured nomination and participant selection process described in the following section.

Recruitment Process

The recruitment process proceeded in two stages: (1) a nomination phase, in which colleagues identified potential participants, and (2) an invitation phase, in which eligible nominees were formally invited to participate.

Nomination Phase. The nomination phase began when academic unit heads forwarded the Invitation to Participate as Nominator to faculty members within their units. Nominators were individuals who recommended participants for the study, while nominees were those subsequently invited to participate. Both nominators and nominees were asked to provide informed consent before participating in any part of the study.

Multi-Source Nomination Approach. To support balanced and credible identification of informal faculty leaders in blended learning, the study employed a multi-source nomination

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approach comprising peer, administrator, and self-nomination. Each source offered a distinct perspective on informal leadership in higher education and, when considered together, strengthened the credibility of the nomination process.

Peer nomination recognized that informal leadership was often most visible to colleagues who experienced its effects directly. Peers were well positioned to identify faculty who influenced blended learning practices without holding formal leadership titles.

Administrator nomination involved academic unit heads such as deans, department chairs, or institute directors within The University System. These administrators may have recognized forms of informal leadership that were less visible to peers, including mentoring, program innovation, policy contributions, or internal faculty development work.

Self-nomination occurred when individuals chose to participate in the study in response to the call for participation. This approach acknowledged that faculty members may recognize and articulate their own leadership practices even when these are not widely visible or formally acknowledged. Allowing self-nomination also supported voluntary participation by enabling faculty members to determine whether their contributions to blended learning practices represented meaningful leadership within their context.

Nomination Process. Faculty members across The University System nominated colleagues perceived to be informal leaders in blended learning. As a faculty member of an ineligible university within the system, I did not participate in the nomination process. Nominees identified through this process formed a pool of potential study participants. The identities of nominators were not disclosed to the faculty members they nominated. Nominations were submitted through a dedicated Google Site that hosted the nomination form created using Google Forms. On this site, I provided key information for nominators, including the eligibility criteria,

the digital poster, and the recruitment video. The site and the form were hosted within the secure Google Workspace of The University System.

Nomination Form. The nomination form began with an informed consent section that provided a brief overview of the study. It outlined the purpose of the nomination request, how the data would be used, voluntary participation and withdrawal rights, confidentiality, data storage and security, the estimated time commitment, and my contact information. The Online Nominator Informed Consent Form was adapted from Athabasca University's Online Anonymous Survey Consent Template (Athabasca University, 2021b) and is included in Appendix D. Nominators were able to proceed to the nomination form only after providing consent.

After consent was obtained and the nominator's email address and autonomous university affiliation were recorded, the form presented the eligibility criteria followed by two questions:

1. Based on the inclusion and exclusion criteria provided, please nominate one or more University System faculty members from your unit or other University System units who, despite not holding a formal leadership role, have provided direction or influenced blended learning practices among colleagues.
2. What is your relationship to the faculty member you are nominating?
 - a. I am a peer (e.g., a faculty colleague of the same or different rank).
 - b. I am an administrator (e.g., dean, department chair, institute director).
 - c. I am nominating myself.

The first question elicited the nomination, while the second supported triangulation across peer, administrator, and self-nominations to enable balanced identification of informal

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faculty leaders. The estimated time required to complete the nomination form was 10 to 20 minutes.

Once nominations were received and reviewed against the eligibility criteria, the process moved to the invitation phase, in which eligible nominees were formally invited to participate.

Invitation Phase. Following the nomination phase, I contacted nominated faculty members by email to invite them to participate in the study, using the official university email service. Faculty email addresses were commonly published on institutional websites, making them publicly available to the university community and the general public. Their presence on official institutional platforms indicated that these addresses were intended for institutional contact and official correspondence. Consistent with the principles of transparency, legitimate purpose, and proportionality under the Data Privacy Act (Republic Act No. 10173, 2012), only faculty whose email addresses were publicly available through these official sources were contacted for this study. The invitations emphasized that participation was voluntary and would not affect professional standing, given my institutional affiliation.

Potential participants received an email invitation outlining the purpose, participation requirements, and ethical protocols of the study. Participation involved either an individual interview or a focus group interview. The estimated time commitment for either interview was approximately one to one-and-a-half hours. Additional activities, such as completing informed consent forms and reviewing transcripts for accuracy, may have required an additional 45 minutes to one hour. The total estimated time commitment for each participant was therefore approximately two to two-and-a-half hours.

The invitation used for study participants was adapted from the Invitation to Participate Template (Athabasca University, 2021a). The final invitation used in this study is included in

Appendix E. Participants were informed that upon completion of all study activities and submission of the final dissertation research to the doctoral institution, they would receive a plain-language summary of the interpretations through a secure webpage link sent to them by email.

Nominees who accepted the invitation were sent a Study Participant Informed Consent Form (ICF). This ICF was also adapted from an Athabasca University template (Athabasca University, 2023). The final informed consent form used in this study is included in Appendix F.

The invitation phase ensured that participation was fully informed, voluntary, and based on a clear understanding of the study's scope and expectations. Once the ICF was read, signed, and returned, the nominee was added to the pool of participants for interviews.

Participant Selection

Participant selection involved identifying individuals from the recruited pool whose experiences aligned with the study design and supported engagement with the research questions. Selection decisions were based on whether the dataset provided sufficient material for interpretation rather than meeting a predetermined numerical target.

In this study, participant selection was informed by two complementary principles. First, I did not adopt saturation as a criterion for determining when data collection should end, as it did not align with the study's reflexive and interpretive orientation. Instead, I used the concept of information power to assess whether the dataset was sufficient and manageable while still supporting meaningful interpretation (Malterud et al., 2016). Second, I used maximum variation sampling to ensure diversity across autonomous universities, disciplines, and faculty ranks. This approach supported the identification of both unique experiences and shared patterns across

participants (Patton, 2015). Together, these principles guided the development of a dataset that was varied in composition, yet sufficient enough to address the research questions.

The principles of information power and maximum variation sampling are discussed in greater detail in the following subsections.

Rethinking Saturation as a Criterion for Data Adequacy

In qualitative research, saturation has often been used as a benchmark for determining sample size and the point at which data collection ends (Saunders et al., 2018). The concept originated in grounded theory as theoretical saturation, defined as the point at which no new theoretical insights or categories emerge and the developing theory is considered sufficiently elaborated (Glaser & Strauss, 1967). Over time, the concept of saturation has been adapted across qualitative traditions. These include data saturation, when no new issues are identified in the dataset (Guest et al., 2006); thematic saturation, when no additional themes appear (Francis et al., 2010); and more recently, code saturation, when all major codes are identified, and meaning saturation, when the dimensions of those codes are fully developed (Hennink et al., 2017).

Although these variations have been used to guide decisions about sample size, they rely on the assumption that meaning is finite. Braun and Clarke (2019, 2022) question this assumption, arguing that saturation is incompatible with reflexive thematic analysis. Saturation assumes that meaning is fixed and contained within the data, such that a point can be reached when no new insights are generated. Reflexive thematic analysis, by contrast, is grounded in a constructionist epistemology in which meaning is constructed through interpretive engagement with the data. Because meaning remains open to further interpretation, analysis cannot fully exhaust the dataset. From this perspective, using saturation as a marker of rigor risks

misrepresenting the epistemological foundations of reflexive thematic analysis (Braun & Clarke, 2022).

This perspective emphasizes the importance of developing a dataset sufficiently varied to support meaningful interpretation, while remaining transparent about how adequacy is assessed.

Judging Data Adequacy in Qualitative Research

Given these limitations of saturation, I used the principle of data adequacy in this study. Data adequacy refers to whether a dataset is sufficiently varied to support the development of coherent patterns of meaning that address the research questions (Braun & Clarke, 2022). This shifts attention away from identifying a definitive endpoint and toward evaluating whether the data provide sufficient variation for interpretation.

In this study, I assessed adequacy based on whether accounts from faculty members across The University System provided sufficient variation to examine conditions that support or hinder informal leadership in blended learning.

Operationalizing Data Adequacy through Information Power

To operationalize data adequacy, I drew on the concept of information power (Malterud et al., 2016). According to this framework, the more relevant the data are to the study aim, the fewer participants are required. Information power is shaped by several factors, including the focus of the study aim, sample characteristics, the use of theory, the quality of dialogue, and the analysis strategy.

A narrowly defined research aim increases information power, whereas broader aims may require a larger sample. Information power is also strengthened when participants' experiences align closely with the study focus. The use of theory further supports information power by providing conceptual lenses that enable meaningful interpretation. The quality of dialogue during

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interviews also influences adequacy. Strong exchanges reduce the need for additional participants, whereas weaker dialogue may require more participants.

In this study, the research aim was narrowly defined, focusing on conditions that support or hinder informal faculty leadership in blended learning. Participants were faculty members within The University System who exercised informal leadership in blended learning while representing varied institutional and professional contexts. The study was also informed by relevant theoretical perspectives and involved both participant-level and cross-participant analysis. Together with the quality of interview dialogue, these features strengthened the information power of the dataset.

Exploratory qualitative analysis does not aim to capture every possible manifestation of a phenomenon, but to identify relevant patterns of meaning. While a small number of participants may illustrate key patterns, too many participants can make the dataset unwieldy and difficult to analyze. Information power therefore served as a flexible reference point throughout data collection in this study, guiding decisions about sample size while balancing analytic engagement with dataset manageability.

While information power guided judgments about sample adequacy, maximum variation sampling informed the composition of the sample.

Ensuring Diversity through Maximum Variation Sampling

To further support data adequacy, I used maximum variation sampling (Patton, 2015). This purposeful sampling strategy seeks to identify patterns across diverse participants. When patterns appear despite substantial variation, they may illuminate core dimensions of a phenomenon.

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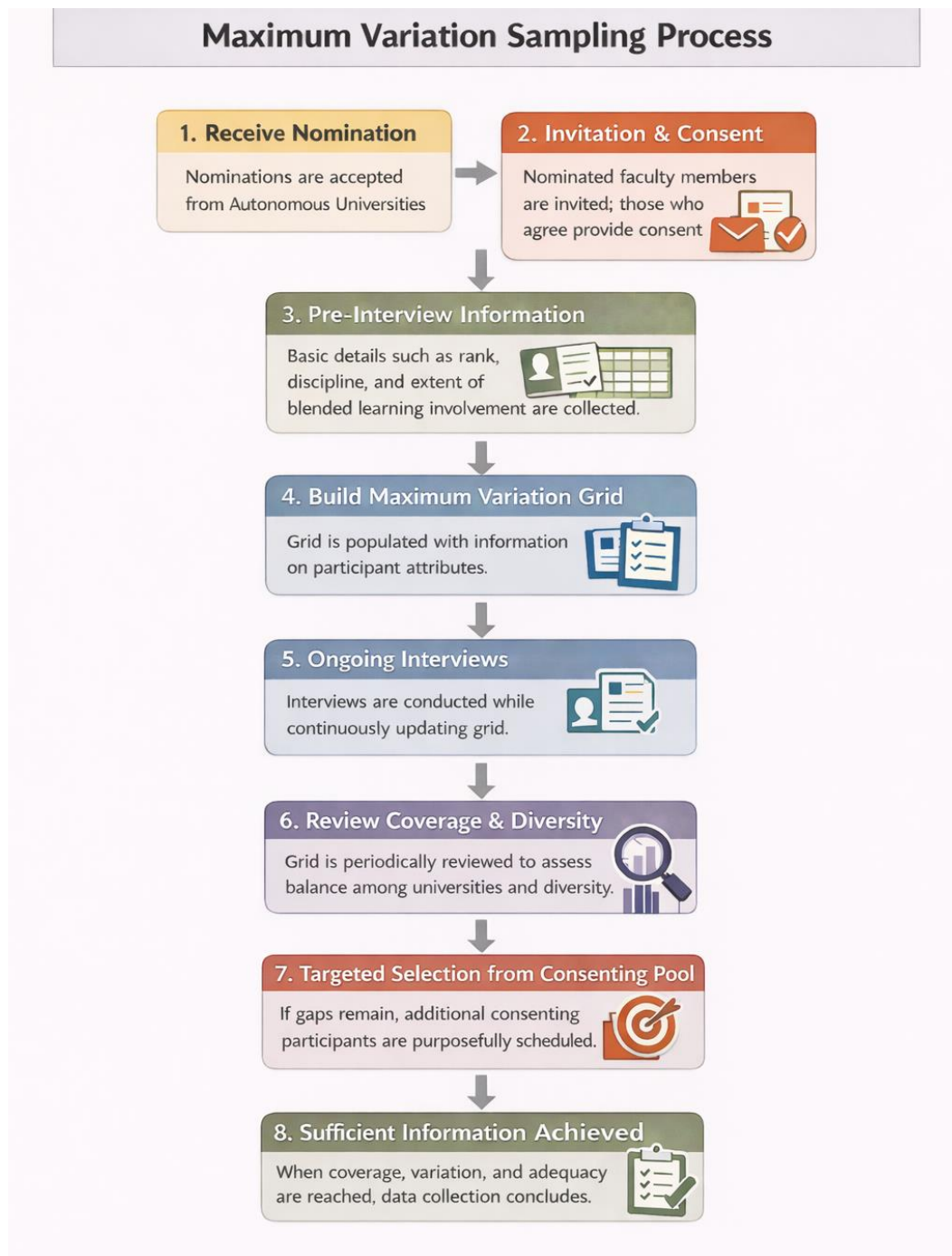
Maximizing variation concerned identifying key characteristics along which diversity was sought during participant selection. In this study, this involved including faculty of different ranks, disciplines, and levels of engagement in blended learning across the autonomous universities of The University System.

This approach produced two complementary outcomes. First, it enabled detailed accounts of individual participants, highlighting distinctive experiences. Second, it supported examination of shared patterns across participants from diverse institutional and disciplinary contexts.

Figure 2 illustrates the stepwise process through which maximum variation sampling was applied in the study.

Figure 2

Maximum Variation Sampling Process



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I documented participant attributes in a maximum variation grid organized by campus and additional characteristics. The grid was updated as interviews continued, and reviewed iteratively to assess balance across participants. When gaps were identified, additional consenting participants from the nominee pool were selected to address gaps in campus representation, academic rank, discipline, and blended learning experience.

By bringing together varied perspectives, maximum variation sampling supported the development of a dataset reflecting different experiences of informal faculty leadership in blended learning.

Participant Flow and Final Analytic Sample

Applying the nomination and selection approach described above, a total of 32 nominations were received across The University System. Of these, two nominees were deemed ineligible based on the inclusion criteria. The remaining 30 eligible nominees were invited to participate; 20 accepted and provided informed consent. Sixteen participants took part in individual in-depth interviews, while four participated in one online focus group.

Among the 20 participants, thirteen were nominated by their unit heads, six by peers, and one self-nominated. Variation was observed in institutional location, academic rank, disciplinary background, and blended learning experience. Participants were drawn from six universities within The University System (Universities A–F), representing varied regional contexts in the Philippines. Academic ranks included instructors, assistant professors, associate professors, and professors, with the largest group consisting of assistant professors, reflecting the composition of the nominates rather than proportional representation of the faculty population. Participants represented multiple disciplinary fields, including education, social sciences, science-technology-engineering-mathematics (STEM), applied sciences, arts and humanities, and health

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sciences. Years of blended learning practice ranged from early adoption (1-3 years) to more than seven years of experience. Participants also differed in their self-described extent of involvement in blended learning, with some reporting moderate engagement and others describing a high level of involvement in blended learning initiatives. This variation enabled the study to capture perspectives from faculty working in different institutional, disciplinary, and professional contexts while examining patterns of meaning across participants. A detailed maximum variation grid, summarizing participant characteristics, is provided in Appendix K.

To protect participant anonymity, all participants were assigned unique codes (e.g., P01 for Participant 1) in the order in which interviews and the focus group were conducted. Individuals who declined participation or did not respond after two follow-up email invitations were not contacted further. This process resulted in a final analytic sample with varied composition.

With participant selection guided by information power and maximum variation sampling, the following section describes the data collection methods used in the study.

Data Collection

In this section, I describe the language used during data collection and outline the methods used to gather data.

Language of Data Collection

English was used as the primary language for data collection and analysis to ensure consistency across participants. The University System uses English as the primary medium of instruction, particularly in graduate programs, where courses are conducted in English to support engagement with international scholarly discourse (University of the Philippines Diliman Information Office, 2026). At the undergraduate level, while policy envisions the gradual use of

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Filipino, English continues to serve as the main language of teaching and learning during this transition. Faculty members are expected to be fluent in English for instruction at undergraduate and graduate levels.

Data Collection Methods

Case study research commonly draws on multiple sources of evidence to support the development of converging lines of inquiry (Yin, 2014). Using multiple data sources allows the phenomenon to be examined from different perspectives and supports triangulation, strengthening the credibility of the analysis.

Interviews. The primary method of data collection was the semi-structured interview. This qualitative method involved one-on-one, open-ended conversations to explore participants' experiences and perspectives in detail. Interviews followed a semi-structured format guided by predetermined open-ended questions aligned with the research questions (Appendix J). Probing and follow-up questions were used to explore responses further and to encourage participants to elaborate on issues that arose during the conversation.

The interview process included three stages: the introduction, the interview questions, and the conclusion (Wallace Foundation, n.d.). During the introduction, I explained the study and confirmed informed consent. Questions were open-ended and progressed from general to more specific topics. At the conclusion of each interview, participants were invited to share additional comments or reflections related to the study topic.

Interview Guide. The interview guide ensured that key issues related to the research questions were addressed during the interview process (Appendix J). While the guide provided a consistent framework, it allowed flexibility to follow the natural flow of the conversation and to

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explore relevant issues. Probing questions were used to clarify responses and examine topics in greater depth (Wallace Foundation, n.d.).

Interview Modality. Interviews were conducted using Zoom video conferencing. Faculty members within The University System were provided with institutional Zoom accounts, making the platform readily accessible for research communication. Zoom was widely used in qualitative research because it supported synchronous interaction while allowing participants to join from different locations (Archibald et al., 2019; Gray et al., 2020; Oliffe et al., 2021).

This approach was also practical for a doctoral study conducted across the Philippine archipelago, where autonomous universities were distributed across multiple island groups. Conducting in-person interviews with participants from geographically distant campuses would have required substantial travel resources (Gray et al., 2020).

All participants consented to audio and video recording through Zoom. The automated transcription function of Zoom was used to generate initial transcripts, which I subsequently reviewed and corrected to ensure accuracy prior to analysis. Recording the interviews also supported careful notetaking, transcript verification, and subsequent analysis (Maxwell, 2013).

Interview Questions. The interview questions were aligned with the research questions. Framing the interview questions around conditions emphasized that the data were derived from participant perspectives and allowed participants to describe those conditions in contextual detail rather than simply identifying them.

The concept of informal leadership was introduced in the research question and further explored in the interview questions, which focused on two leadership functions: providing direction and exercising influence. This approach drew on Leithwood et al.'s (2004) review of leadership studies, which identified these two functions as core to most definitions of leadership.

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The definition of informality, based on the absence of formal authority or position, was supported by Leino (2022).

The full set of interview questions used in the study is provided in Appendix J.

Member Checking. After analytic transcripts were prepared, they were returned to participants for review. Participants were invited to identify any inaccuracies, clarifications, or minor corrections to ensure their statements were represented accurately. This step supported transcript accuracy while preserving the meaning of participants' accounts. Member checking was used to verify transcript accuracy rather than to validate analytic interpretations.

Online Focus Group. An online focus group (OFG) was used as a supplementary data collection method to complement the individual interviews (McMillan & Schumacher, 2013). The OFG provided an opportunity to observe how participants discussed and responded to shared experiences of informal faculty leadership in blended learning.

The use of videoconferencing supported participation across institutional locations while reducing logistical constraints associated with in-person focus groups (Schulze et al., 2023). The online format also supported structured turn-taking and moderation, facilitating balanced participation. Potential limitations of OFGs, including technical disruptions and reduced access to nonverbal cues, were recognized and managed through active moderation (Schulze et al., 2023).

For this study, I conducted one OFG with four participants drawn from the participant pool who had not participated in the individual interviews. These participants shared similar characteristics, including institutional affiliation and academic roles, to support group coherence and productive interaction, although they were not necessarily personally acquainted with one another (McMillan & Schumacher, 2013).

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The OFG was conducted and recorded using Zoom, following procedures consistent with the individual interviews. At the start of the session, I reminded participants that, while confidentiality was expected, anonymity could not be fully guaranteed in a group setting, in accordance with guidance from the Athabasca University Research Ethics Board.

Documents. In addition to interviews, documents served as a supplementary source of qualitative data. Institutional records can provide contextual information and support the interpretation of participants' accounts (Tisdell et al., 2025, Yin, 2014).

Sources of Documentary Data. Documentary data were drawn from publicly available repositories on The University System's websites and from relevant offices and academic units. The study focused on materials related to blended learning strategies, including policy briefs, system-level directives, strategic plans, and official communications such as memoranda. Documents were used to corroborate interview accounts and verify institutional details, including timelines and policy developments (Yin, 2014).

Interpretation and Use of Documentary Data. Documents supported analytic triangulation and helped situate informal faculty leadership in blended learning within its institutional environment. They were interpreted critically, recognizing that institutional records may be selective or shaped by institutional priorities (Tisdell et al., 2025; Yin, 2014).

Online sources were handled with care, particularly in distinguishing between document types. Official policy documents were treated as relatively stable sources, while institutional websites were considered dynamic and subject to change.

With the study's data sources established, the following section outlines how the collected materials were managed, stored, and handled to ensure confidentiality, security, and responsible use.

Data Management Plan

A research data management plan guided the handling of study materials throughout the research process, including procedures for data storage, security, documentation, and long-term stewardship. The plan addressed the management of interview data, focus group data, and documentary materials in ways consistent with requirements for confidentiality and responsible data handling. A copy of the data management plan is provided in Appendix G. The version included reflects the plan submitted for dissertation proposal review and approved by the Athabasca University Research Ethics Board (AU REB).

While data management practices focus on how research materials are stored and safeguarded, ethical considerations extend more broadly to how participants and institutional contexts are engaged throughout the research process.

Research Ethics

This study was conducted in accordance with established ethical standards for research involving human participants. Ethical considerations were particularly important given the involvement of faculty members and the use of institutional documents that may contain professional or organizational sensitivities.

As described earlier in this chapter, ethics approval was obtained from the Athabasca University Research Ethics Board, with additional institutional approvals secured as required by participating universities within The University System.

Ethical conduct in the study was guided by the principles of privacy, accuracy, property, and accessibility (Kivunja & Kuyini, 2017). Participant confidentiality was protected through informed consent procedures, data de-identification, and restricted access to identifiable information. Although full anonymity was not possible because institutional email addresses

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were used for recruitment, identifying details were removed from transcripts, notes, and analytic materials, and coded identifiers were used throughout the analysis. The code key linking participant identities to assigned codes was stored separately from the main dataset in a secure location.

Data accuracy was supported through audio recording of interviews and the focus group with participant consent, followed by transcription and verification. Analytic decisions were documented to support transparency throughout the analytic process. Respect for data as the intellectual property of participants and institutions was ensured through explicit consent and by confirming that materials were not shared or used beyond the agreed research scope.

I was the only individual with access to the research data. Electronic files were stored in encrypted, password-protected formats, while physical records were kept in locked storage. De-identified materials, including cleaned transcripts and analytic summaries, were organized in secure formats to support long-term retention in accordance with institutional and ethical guidelines.

Participants were not given the option to be identified as authors or creators of research materials in order to maintain confidentiality and minimize potential professional or institutional risks. All interview data, documents, and artifacts shared by participants were anonymized prior to inclusion in reports or publications. This approach supported voluntary participation and encouraged open sharing of experiences within academic and professional contexts.

With data collection, management, and ethical considerations established, the following section describes how the data were analyzed.

Data Analysis

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Interview and focus group data were analyzed using an interpretive qualitative approach aligned with the study's aims and conceptual framing. The analysis examined patterned meanings across participants' accounts while remaining attentive to context, variation, and conditions shaping informal faculty leadership in blended learning. The analytic orientation and procedures are described below.

Researcher Reflexivity

In this study, reflexive awareness and transparent documentation of analytic decisions supported attention to how interpretations were constructed.

Throughout the study, I engaged in reflexive memoing to examine how prior experiences, assumptions, and professional positioning within The University System might have shaped the interpretation of participants' accounts. Reflexive memos were written during data familiarization, coding, and pattern development to document analytic reflections and evolving interpretations. In addition, I maintained a reflexive journal throughout the research process to record methodological reflections, emerging questions, and considerations related to positionality and decision-making. Together, these records formed part of the analytic audit trail supporting transparency in the interpretive process.

Reflexive Thematic Analysis

Data were analyzed using reflexive thematic analysis following the approach developed by Braun and Clarke (2019, 2022). Reflexive thematic analysis was selected because it supported an interpretive examination of patterned meaning across participants' accounts while recognizing my role in analytic judgment. It was appropriate because the research questions sought to understand how informal faculty leadership in blended learning was experienced and shaped by conditions within institutional contexts.

Braun and Clarke's (2022) methodological text provided the primary framework for reflexive thematic analysis, while published worked examples by Byrne (2022) and Pearson et al. (2025) illustrated how these principles were enacted in research studies. While Braun and Clarke (2022) described six phases of reflexive thematic analysis in terms of *themes*, I adopted conceptually aligned phase labels that reflected the interpretive and reflexive orientation of this study. In addition, the term, *interpretive insights*, was used in place of themes to emphasize that the analytic outcomes were constructed through engagement with the data rather than discovered as fixed meanings. These phases corresponded to Braun and Clarke's framework but were expressed in language that emphasizes analytic engagement rather than sequence. For clarity, the original terminology used by Braun and Clarke (p. 35) is provided in parentheses alongside the phase labels used in the study.

1. Familiarization with the data
2. Generating initial codes
3. Initial pattern generation (Generating initial themes)
4. Pattern development and review (Developing and reviewing themes)
5. Pattern refining, defining, and naming interpretive insights (Refining, defining, and naming themes)
6. Writing up the analysis (Writing up)

These six phases comprised a non-linear and flexible analytic process in which phases were revisited iteratively. The analysis was primarily inductive and experiential in orientation. This approach enabled the development of patterns through interpretation of the data. Analysis moved flexibly across these phases as patterns were developed, revisited, and refined, with sustained attention to analytic coherence, boundary clarity, and transparency.

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In line with Braun and Clarke's (2022) reflexive thematic analysis, patterns of meaning were developed through my engagement with the data rather than being treated as pre-existing. My interpretations developed through iterative movement between the data, coding, and analytic memoing, alongside ongoing reflection on how my assumptions shaped the analytic process. While Lewin's force field perspective informed how I interpreted institutional conditions, I did not use it as a coding framework. Instead, I applied it as an interpretive lens after patterns of meaning had been developed.

A brief overview of how the process was operationalized is presented below, while a detailed account is provided in Chapter 4.

Phase 1: Familiarization with the Data. This phase involved three interrelated practices: immersion in the dataset, critical engagement with participants' accounts as analytic material, and note-making to capture early observations. These practices supported the development of a working knowledge of the dataset while encouraging reflection on participants' descriptions of their experiences and institutional contexts.

Immersion involved repeated reading of the sixteen individual interview transcripts in the order in which the interviews were conducted. Video and audio recordings were revisited during transcript review to confirm accuracy and support immersion in participants' accounts. Sequential reading supported attention to how participants described their entry into blended learning, their leadership practices in everyday work, and the enabling and constraining conditions surrounding informal leadership.

During this stage, the focus group transcript was set aside so analytic attention could remain on individual accounts. It was later read in full and incorporated into the familiarization process after the individual transcripts had been reviewed.

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Critical engagement involved reading the transcripts as analytic material rather than narrative accounts, attending to how participants: (1) made sense of their leadership experiences, (2) described institutional contexts, and (3) framed supporting and hindering conditions across accounts. Note-making accompanied this process through brief familiarization memos for each participant, together with margin annotations and analytic notes recorded during transcript review. Insights from familiarization informed the next stage, where transcripts were systematically coded.

Phase 2: Generating Initial Codes. Building on familiarization, analytic engagement drew on first-cycle coding methods from Saldaña (2025). Each transcript was read carefully, and segments relevant to the research questions were coded using in vivo and process codes. In vivo coding attended to participants' own language, while process coding focused on actions and practices related to blended learning and informal faculty leadership. Codes were treated as provisional analytic prompts rather than fixed units. Earlier transcripts were revisited as coding progressed to refine or consolidate codes as similarities and differences across accounts became clearer. The focus group transcript was coded separately, with attention to interactional dynamics, and was not integrated with individual coding at this stage.

Transcripts were stored in digital and printed formats to support annotation. In vivo and process codes were inserted into analytic transcripts using the comment function in Microsoft Word or handwritten on printed copies, alongside reflexive notes. Spreadsheet tables were used selectively to organize pattern statements and support cross-participant comparison, with multiple codes applied where appropriate to capture different dimensions.

This approach supported sustained engagement with each transcript and movement between individual and cross-participant analysis. Reflexive coding memos documented analytic

decisions and developing interpretations. The resulting set of codes formed the analytic foundation for the next stage, in which relationships among codes were examined.

Phase 3: Initial Pattern Generation. Analytic attention shifted from individual codes to patterns of meaning across codes. Codes generated during Phase 2 that appeared repeatedly or were conceptually related were clustered into pattern statements representing recurring observations. At this stage, these pattern statements were tentative rather than fully articulated constructions.

As additional accounts were analyzed, new pattern statements were added and existing ones refined. Different ways of grouping codes were considered, and clusters were revised, combined, or set aside when they did not represent a coherent pattern.

Not all codes developed during Phase 2 were incorporated into early pattern statements. Some remained unallocated and were revisited as analysis continued. Through repeated review of codes and clustering related meanings, an initial set of pattern statements was developed.

Phase 4: Pattern Development and Review. This phase involved reviewing relationships among the pattern statements developed in Phase 3 to determine whether they formed coherent clusters of shared meaning (Braun & Clarke, 2022). Patterns were examined against coded extracts and the full dataset to assess whether they illustrated varied expressions of shared meaning.

Pattern consolidation was guided by criteria consistent with reflexive thematic analysis, including recurrence across contexts, interpretive relevance to the research questions, boundary clarity, and analytic distinctiveness. Recurrence was treated as an indicator of patterned meaning rather than frequency. Patterns that clarified how informal leadership was enacted, how influence operated, and how institutional conditions shaped practice were prioritized. Boundary clarity

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helped determine whether a pattern stood independently or was integrated into broader constructions, while alignment with the research questions ensured relevance.

Through this process, some patterns were retained as analytically central, others were integrated into broader constructions, and some were retained as contextual material. This pruning reduced conceptual overlap and clarified what each pattern included and excluded. Through this iterative review, the analytic boundaries of candidate patterns stabilized as those that did not contribute distinct interpretive insights were merged, refined, or set aside. During this stage, the analysis remained open to revision as I moved between coded extracts, transcripts, and analytic memos.

At this stage, the focus group transcript (P07–P10), previously set aside, was examined in relation to the developing patterns. Attention was given to shared language, collective framing, and negotiated meanings. The focus group reinforced and elaborated patterns identified in the individual interviews. This process clarified relationships among patterns and prepared the analysis for the next stage, in which interpretive insights were defined and named.

Phase 5: Pattern Refining, Defining, and Naming. In this phase, the developing patterns were refined to clarify the central organizing idea and ensure that boundaries remained conceptually distinct. The analysis examined what each interpretive insight conveyed about the dataset and how it contributed to the broader interpretation of informal faculty leadership in blended learning.

During this stage, brief analytic summaries were written for each interpretive insight to clarify the central organizing idea, articulate its role in the overall account, and specify what the interpretive insight included and excluded. Writing these summaries helped ensure that each insight represented a coherent pattern of shared meaning.

Names of interpretive insights were refined to accurately reflect the analytic work of each. Naming involved selecting concise phrases that captured the core idea while remaining grounded in patterned meanings identified across participants' accounts.

The refining process remained iterative. As patterns of meaning were clarified, earlier analytic decisions were revisited, and minor adjustments were made to strengthen coherence across the patterns. Through this process, the patterns were consolidated into a coherent analytic framework representing the central patterns of meaning identified across the dataset. These patterns are discussed in detail in Chapter 4.

Phase 6: Writing Up the Analytic Insights. This phase involved developing the analytic account presented in the dissertation. In reflexive thematic analysis, writing is treated not only as reporting but as part of the analytic process. Earlier stages produced analytic notes, reflexive memos, and participant-level summaries that helped clarify interpretations and track patterns.

I drew on these materials in developing the analytic narrative presented in Chapter 4. Each pattern is illustrated with selected extracts from the individual interviews and the focus group discussion. These extracts illustrate how patterns of meaning were expressed across accounts and varied across contexts within the university system. The extracts and patterns are presented alongside interpretation so the relationship between data and analysis remains visible.

I made decisions about the stabilization of patterns through iterative comparison across accounts, particularly in the later phases, when these were examined for coherence, distinctiveness, and explanatory power. I retained patterns when they consistently accounted for variation across participants' accounts, and refined them when their boundaries remained unclear or overlapping.

The writing process involved several rounds of revision to strengthen clarity and coherence across the analytic narrative. As sections were written and refined, earlier interpretations were revisited. In this way, writing continued to support analytic reflection and helped ensure that the final account reflected the patterns interpreted across the dataset.

Use of Artificial Intelligence (AI)-Assisted Tools in Data Analysis

Throughout the phases of reflexive thematic analysis, AI-assisted tools were used selectively to support language editing, organizational refinement during drafting, clarification of methodological descriptions, and formatting and data management tasks. I retained responsibility for all analytic decisions, including coding, pattern construction, and interpretation. I also critically evaluated and modified any AI-assisted outputs used during the process.

Summary

In this chapter, I presented the methodology used to examine informal faculty leadership in blended learning within The University System. I explained the rationale for adopting a qualitative case study approach and discussed alternative methodologies considered but not selected. I described the case study design, identified the bounded case and embedded subunits, and detailed the research design in relation to ethical and institutional requirements.

I also described participant selection and recruitment strategies, and the procedures used for data collection through in-depth interviews, an online focus group, and documentary sources. Procedures for transcript preparation, data management, and ethical safeguards were also outlined. Finally, I outlined the analytic procedures used in the study, drawing on reflexive thematic analysis supported by manual coding and supplemented by selective use of AI-assisted tools for drafting, organization, and methodological clarification, while retaining responsibility for all analytic decisions.

This chapter establishes the methodological framework for Chapter 4, which presents the interpretive insights developed through analysis of the interview data.

Chapter 4. Analytic Insights

Introduction

In this chapter, I present the analytic insights developed from the individual interviews and the focus group with faculty members involved in blended learning within The University System. The analysis focuses on how informal faculty leadership is enacted in practice, how institutional conditions shape that enactment, and how participants make sense of their experiences.

While many of the challenges described by participants have been noted in the literature on blended learning and faculty leadership, this analysis reframes these issues in relation to institutional misalignment and the compensatory work of informal leadership. This framing shifts attention from describing isolated challenges to examining how expectations, supports, and constraints interact within specific institutional contexts.

Analytic Process

The first half of the chapter traces how my understanding of the dataset developed through working with the data, interpretation of participants' accounts, and iterative movement through the analytic phases of reflexive thematic analysis (Braun & Clarke, 2022). The second half presents the four interpretive insights developed through this process. I approached this analysis with awareness that I was working within a similar institutional context, and therefore remained attentive to how participants framed their own accounts.

Familiarization with the Data

I began the analytic process by spending time with the dataset and becoming familiar with the interview materials. I read the interview transcripts repeatedly and viewed the video recordings when needed, both to confirm transcript accuracy and to reconnect with the tone and

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context of each conversation. I worked through the transcripts in the order in which the interviews were conducted, which allowed me to retrace how participants described their entry into blended learning practices and how they situated these experiences within their institutional environments.

While reading through the transcripts, I stayed close to how participants described their work and interactions with colleagues. I attended to how they spoke about their everyday teaching practices, how they positioned themselves in relation to others, and how they described the conditions that supported or hindered their work in blended learning contexts at their respective universities. During this phase, I wrote brief familiarization memos and margin notes to capture early impressions and questions. These notes helped me to remain attentive to early analytic possibilities while holding back from making firm interpretations too early in the process. I kept paper and electronic copies (e-copies) of each transcript, making margin notes using Microsoft Word's comment feature on the e-copies and pencil notes on the paper copies to engage more closely with the interview data.

As I analyzed the early transcripts, I noticed that participants rarely described themselves explicitly as leaders. This observation was significant because one of my interview questions examined how informal faculty leadership was enacted in practice. Instead of describing themselves as leaders, participants often framed their role as helping colleagues address practical teaching challenges or sharing approaches that had worked in their own courses. This prompted me to pay closer attention to how influence appeared indirectly through everyday actions and collegial interactions.

To maintain close engagement with individual accounts during familiarization, I initially set aside the focus group transcript. My intention at this stage was to develop a clear sense of how

each participant described their experiences independently before introducing interactional data into the analysis. I returned to the focus group transcript later in the analytic process, once patterns across the individual interviews had begun to take shape.

Generating Initial Codes

Following familiarization, I began first-cycle coding of the sixteen individual interview transcripts. I worked closely with participants' language while also attending to actions and practices related to blended learning and informal faculty leadership.

As I worked through the transcripts, I periodically revisited earlier interviews as new codes were developed, allowing me to reconsider how different participants described similar experiences. This movement between transcripts helped clarify points of similarity and difference across accounts.

During this phase, I also wrote reflexive memos to document tentative interpretations and analytic uncertainties. These memos helped me remain attentive to how my own assumptions might shape interpretation while allowing analytic ideas to develop provisionally. An example of an early reflexive coding memo is shown in Figure 3.

Figure 3

Example of an Early Reflexive Coding Memo

Sample Reflexive Memo

When I began coding this interview, what struck me first was how blended learning entered the story as something mandated rather than chosen. There were repeated references to memoranda, percentages, and compliance. My initial instinct was to interpret this as institutional pressure shaping practice, and that may still be the case, but I noticed that I was already moving toward interpretation before spending enough time with the data.

On a second pass, what I noticed was the contrast in tone when the participant spoke about time and caregiving. There was noticeably more affect in that portion of the account when the participant was talking about her child. Because blended learning practice afforded schedule flexibility that

accommodated caregiving responsibilities, this seemed to reinforce the participant's motivation to continue using this approach. Blended learning did not appear to be framed primarily as innovation or student-centered design. Instead, it seemed to function as a way of managing competing demands. That shift matters. I need to be careful not to romanticize blended learning as pedagogical leadership if it is experienced more as a survival strategy.

I also felt a pull to identify leadership in moments of persistence or modeling. However, the participant repeatedly displaced influence upward toward policy and outward toward structural requirements. If I over-code these moments as leadership, I risk imposing coherence that the participant does not claim. At this point, it feels more appropriate to code actions and positioning separately and allow patterns to develop later in the analysis.

There is also something interesting about agency here. Influence appears indirect. It is not asserted. It seems to occur almost incidentally, if at all. I am beginning to consider that leadership, if present, may be enacted without being explicitly claimed. I am not yet sure whether this reflects reluctance, modesty, institutional hierarchy, or something else entirely.

For now, I will keep the codes provisional. I need to resist collapsing caregiving, compliance, and contribution into a single storyline. The distinctions feel important, even if they become less clear later in the analysis.

As I analyzed the transcripts, I noticed that many extracts described actions and practices rather than explicit claims of leadership. Participants often framed their role in terms of helping colleagues solve instructional problems, sharing approaches that had worked in their own courses, making tools available, and modelling activities they had developed. This observation prompted closer attention to how influence appeared in everyday practices rather than through formal leadership labels.

In the early stages, some code groupings reflected shared topics rather than shared meaning. Revisiting Braun and Clarke's (2022) discussion of shared-meaning patterns and topic summaries helped me reconsider how codes related to one another conceptually. Instead of organizing the data around what participants talked about, I began examining how different

extracts related to one another across accounts. Over time, I became more comfortable making my own interpretations and developing patterns of meaning from the interview dataset.

Initial Pattern Generation

As I progressed through the data, I began grouping related codes into provisional patterns of meaning. These early patterns were exploratory and continued to evolve as additional participants' accounts were examined. Initial patterns were shaped through my interpretation of the first participant's account and were then reconsidered across subsequent transcripts to examine whether similar meanings were evident in other accounts.

Table 2 presents an example of this early pattern-generation process drawn from one participant. The table illustrates how in vivo and process codes were interpreted and consolidated into preliminary pattern statements.

Table 2

Illustrative Code to Pattern Generation for a Study Participant

In Vivo Codes	Process Codes	Pattern Statement
"I was just there as an older sister"	downplaying leadership role	Participants often describe what they do as just helping rather than leading.
	framing influence as helping	
"I wasn't really there to become their leader"	mentoring informally	
	modeling practice	
"I was just trying to help them"	providing constant support	
"I didn't know what to do"	adapting to constraints	Leadership seems to develop out of solving classroom problems.
	solving classroom problems	
	experimenting with tools	

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In Vivo Codes	Process Codes	Pattern Statement
“How do you address this kind of problem inside the classroom?”	experimenting with methods developing practices through trial	
“It started with telling them how to create solutions”		
“because it works with my students”		
“results matter”	attributing influence on	Participants link their
“students will market for you”	outcomes converting results into	influence to results rather than to themselves.
“staff will market it for you”	credibility	
“word of mouth”	diffusing influence through results gaining legitimacy indirectly	
“I give them all of my syllabus”	sharing resources freely modeling practice	Influence happens when participants show and share
“I give them all of the books that I have”	demonstrating teaching methods	what they do.
“sort of technical assistance”		
“walking your talk”		

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In Vivo Codes	Process Codes	Pattern Statement
“They ask me questions and then ask me more questions”	responding to repeated requests	Colleagues keep coming back with more questions after seeing something work.
“They were asking me everything every day”	supporting colleagues iteratively	
“Later on, they formulate their own methods”	co-developing practice over time	
	providing constant support	

Note. In vivo codes are presented verbatim from participant transcripts. Process codes represent first-cycle coding interpretations. Pattern statements reflect initial analytic pattern construction.

A complete account of code-to-pattern generation for the early participants (Participants 01, 02, and 05) is presented in Tables 9 to 11 (Appendix L).

As the analysis continued, I examined how the developing patterns held across the first five participants’ accounts. These patterns reflected recurring ways participants described their blended learning practices, their interactions with colleagues, and how informal influence developed in their work environments. At this stage, the patterns remained provisional and continued to evolve as I worked with additional accounts.

Table 3 presents a subset of the cross-participant pattern matrix developed at this stage of the analysis, showing how patterns were examined across cases rather than within a single account. The patterns included in the table are selected examples that illustrate the process.

Table 3*Subset of Cross-Participant Pattern Matrix, Participants 01–05*

Analytic Pattern	P01	P02	P03	P04	P05
Participants often say they are <i>just helping</i> rather than leading.	✓	✓	✓	✓	
Leadership seems to grow out of solving classroom problems.	✓		✓	✓	✓
Colleagues trust the approach when they see that it works.	✓		✓		✓
Informal leadership work seems necessary, but is not fully supported by the system.	✓		✓		✓
Blended begins as a response to disruption, not as pedagogy.		✓	✓		✓

Note. Px: Participant number; ✓: Pattern was present in the participant account

Reviewing these early illustrative patterns suggested several recurring observations. Participants often framed their role as helping colleagues rather than leading them, and informal leadership frequently appeared through problem-solving in the classroom. Participants also described how trust in blended learning developed when colleagues observed that an approach worked. At the same time, several accounts suggested that informal leadership existed within institutional environments that did not strongly support these activities. Blended learning was also described as developing in response to practical constraints rather than as a pedagogical ideology. As additional participants' accounts were incorporated, these observations were further refined into more clearly defined patterns of meaning.

I consolidated these developing observations into a working list of pattern statements as the analysis expanded to include additional participants. These statements summarized recurring

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patterns of meaning and served as a provisional analytic scaffold. At this stage, they were not treated as final interpretive insights, as they had not yet been fully examined for conceptual boundaries and explanatory coherence across the dataset. The complete set of 28 analytic pattern statements generated from this stage of analysis is presented on the next page in Figure 4. No additional analytic pattern statements were generated in subsequent analyses of the remaining individual interviews or the focus group, as later observations were subsumed within this initial set and served to refine rather than expand it.

These pattern statements were organized to reflect different aspects of how informal faculty leadership appeared across the dataset, including how leadership was positioned, influence enacted, legitimacy established, and institutional conditions shaped practice. This organization provided an initial structure for interpreting the patterns while remaining provisional. The wording and grouping were revisited as the analysis progressed and as patterns were further examined for conceptual coherence.

Figure 4

Pattern Statements Developed from Participants 01 to 05

1. Leadership is disclaimed or minimized, even when influence is evident.
2. Influence is displaced away from the self (to policy, tools, or outcomes).
3. Leadership is framed as a by-product of problem-solving, not identity.
4. Influence is enacted through modeling, illustrating, or sharing artifacts.
5. Influence is iterative and responsive, emerging after repeated requests.
6. Influence travels laterally through peers, not vertically through authority.
7. Over time, blended learning transitions toward planned integration or situational use.
8. Legitimacy is built through observable usefulness, when something tangibly works for others.
9. Peer recognition and being asked again functions as a key legitimacy signal.
10. Formal rank and age hierarchies constrain legitimacy, especially for younger or junior faculty.

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11. Informality enables flexibility, approachability, and peer-to-peer exchange.
12. The same informality also limits authority, credit, and permission to intervene beyond one's lane.
13. Enabling conditions are described as permission and freedom, not directive support.
14. Moments of recognition (being thanked, asked, funded) function as turning points that amplify confidence and reach.
15. Formal leadership roles are approached with conditional reluctance, often tied to workload, caregiving, or lack of system readiness.
16. Willingness to assume formal roles is dependent on resources, load credit, or institutional recognition, not aspiration alone.
17. Leadership is enacted through contribution rather than coordination.
18. Hindering conditions are structural.
19. Legitimacy is earned locally and pragmatically, but unevenly recognized institutionally.
20. Informal leadership appears to be necessary, but is structurally unsupported.
21. Blended learning enters initially as a solution to constraints, not as a pedagogical ideology.
22. Blended learning is framed as infrastructure (e.g., planning, scheduling, systems, LMS), rather than as innovation.
23. Legitimacy is located upward in policy, guidelines, or formal issuances, rather than in interpersonal validation.
24. Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.
25. Policy mandates without aligned conditions create strain.
26. Emergency or early experimentation gives way to stabilization or routinization.
27. Blended learning indicates institutional gaps that invite informal problem-solving.
28. Leadership functions are enacted without naming a trajectory at all, simply doing the work that is needed.

Before proceeding to pattern development, I examine how supporting and hindering conditions are already evident at the level of patterns, providing an initial response to Research Questions 1 and 2.

Supporting and Hindering Conditions at the Level of Patterns

At this stage of analysis, supporting and hindering conditions were already evident at the level of patterns. Conditions that shaped informal faculty leadership in blended learning were not

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experienced as discrete categories of support or constraint, but as interrelated features of practice that enabled or limited what could be done, by whom, and under what circumstances. Rather than appearing as formalized systems of support, enabling conditions were often described in terms of permission, relational dynamics, and moments of recognition (Patterns 8, 9, 13, 14), while hindering conditions were linked to structural constraints, limits of informality, and misalignment between expectations and available support (Patterns 12, 18, 25).

Conditions that Support Informal Faculty Leadership. At the level of patterns, enabling conditions were most clearly expressed through forms of permission, relational legitimacy, and informal modes of interaction. Enabling was articulated as permission and freedom rather than directive support (Pattern 13), where institutional arrangements allowed faculty to act without prescribing how that action should unfold. Within this space, informal leadership developed through local initiative and adaptation, rather than through formally assigned roles or structured programs (Patterns 17, 28).

Relationally, enabling conditions were tied to how legitimacy was established and sustained. Across the patterns, legitimacy was built through observable usefulness (Pattern 8), where practices that demonstrably worked for others were more likely to be taken up. This was reinforced through peer recognition and repeated requests (Pattern 9), which signaled that one's contributions were valued and worth continuing. In some instances, moments of recognition, such as being acknowledged, consulted, or supported, functioned as turning points that expanded both confidence and reach (Pattern 14), even as such recognition remained uneven at the institutional level (Pattern 19).

Informality itself also functioned as an enabling condition. The patterns suggest that informal arrangements enabled flexibility, approachability, and peer-to-peer exchange (Pattern

11), allowing influence to move laterally rather than through formal authority (Pattern 6). Within these conditions, leadership was enacted through contribution (Pattern 17) and responsiveness over time (Pattern 5), often without being framed as part of a defined leadership trajectory (Pattern 28). Leadership was sustained through ongoing participation in practice rather than through formal designation.

Taken together, these patterns suggest that enabling conditions operate less as formal supports and more as conditions that make action possible, visible, and taken up by others.

Conditions that Hinder Informal Faculty Leadership. In contrast to enabling conditions, which were often described through relational and situational dynamics, hindering conditions emerged as a strongly recurring and explicitly articulated pattern across cases (Pattern 18). Across participants, constraints were consistently identified in structural terms, including limitations related to hierarchy (Pattern 10), authority and scope (Pattern 12), and the absence of aligned institutional support (Pattern 20, 25). This recurrence was evident across participants and contexts, suggesting that hindering conditions were persistent features of the institutional environment rather than occasional barriers.

Hindering conditions were articulated as structural and systemic constraints that shaped the limits of informal leadership. The patterns suggest that formal rank and age hierarchies constrain legitimacy (Pattern 10), particularly for those in junior positions, limiting whose contributions are recognized or taken seriously. At the same time, the informality that enables flexibility also introduces limits. Informal leadership lacks authority, credit, and permission to act beyond one's immediate scope (Pattern 12), restricting how far influence can extend.

More broadly, informal leadership was often experienced as necessary but unsupported (Pattern 20), where expectations to engage in blended learning were not matched by

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corresponding resources, authority, or institutional arrangements. This misalignment was further reflected in patterns showing that policy mandates without aligned conditions create strain (Pattern 25), placing responsibility on faculty to meet expectations without sufficient support.

These structural conditions also shaped how participants oriented themselves toward formal leadership roles. Patterns show that formal roles were approached with conditional reluctance (Pattern 15), often influenced by workload, caregiving responsibilities, and perceptions of system readiness. Willingness to assume such roles depended on the availability of resources, recognition, and workable conditions (Pattern 16), rather than on aspiration alone.

Finally, the absence of obligation within informal arrangements introduced an additional constraint. Informal leadership often depends on receptivity rather than authority (Pattern 24), meaning that suggestions can be taken up or ignored without consequence, limiting the consistency and reach of influence.

Synthesis at the Pattern Level. Across these patterns, supporting and hindering conditions are not opposites but coexisting features of the same institutional context. Informality, for example, simultaneously enables flexibility (Pattern 11) and limits authority (Pattern 12). Institutional arrangements may provide permission to act (Pattern 13), while withholding the structural alignment needed to sustain that action at scale (Pattern 20, 25).

As these patterns are considered together, informal faculty leadership is shaped by conditions that both make it possible and constrain its effectiveness. Faculty navigate a space where action is enabled but not fully supported, and where the same conditions that allow leadership to take shape also set its limits. This patterned coexistence of enabling and hindering conditions reflects the broader institutional context within which informal leadership is enacted.

Pattern Development and Review

Pattern Survival Testing. I examined whether patterns identified in earlier transcripts reappeared across the second group of participants' accounts (Participants 06, 11–15), excluding those in the focus group (Participants 07-10). I treated recurrence as an indicator of patterned meaning. The presence of patterns across subsequent accounts indicated that they held under variation and across differing contextual conditions. Some patterns were evident across participants, while others appeared only partially or required reinterpretation to reflect variations in experience. A few patterns shifted or became less visible in later accounts.

Survival testing showed which patterns held consistently across institutional contexts and which were more contingent on specific conditions. Rather than treating recurrence as confirmation, I examined how patterns appeared across accounts, including when they were partial, strained, or absent, and what these variations suggested about the conditions shaping practice. This process supported a more nuanced understanding of how informal faculty leadership was enacted across contexts. To illustrate this, an illustrative subset of pattern survival testing from this stage of analysis is presented on the next page in Table 4.

A complete account of pattern survival testing is presented in Table 12 (Appendix L).

Most patterns recurred across this second group of participants' accounts, indicating that the interpretations were not limited to the initial cases examined. However, during this stage, I noticed that one participant's account functioned differently from the others. Several patterns that had appeared consistently in earlier transcripts were not meaningfully reflected in the account of Participant 12 (P12).

Table 4*Subset of Pattern Survival Testing on Participants 06 and 11–15*

Pattern	Recurred	Strained	Disappeared
Leadership is enacted through contribution rather than coordination.	P06, P11, P15	P13, P14	P12
Hindering conditions are structural.	P06, P11, P12, P13, P14, P15 (all); ! Extremely strong recurrence		
Legitimacy is earned locally and pragmatically, but unevenly recognized institutionally.	P06, P11, P14, P15		P12
Blended learning enters initially as a solution to constraints, not as a pedagogical ideology.	P12, P13, P14, P15	P06 (discipline necessity rather than crisis)	P11 (BL part of repertoire, not constraint)
Blended learning is framed as infrastructure	P06, P12, P13, P15	P14 (engagement foregrounded)	P11 (pedagogical framing)

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Pattern	Recurred	Strained	Disappeared
(e.g., planning, scheduling, systems, LMS), rather than as “innovation”.			

Note. Px: Participant number; ! = Analytically important observation.

At first, I considered whether I had interpreted the earlier patterns as stronger than they were. I returned to the transcript and re-examined the coded extracts in greater detail. This closer engagement suggested that Participant 12, a newly hired faculty member, had only recently begun implementing blended learning and was still in the early stages of practice. Rather than describing situations in which colleagues sought guidance or adopted their practices, the participant described learning from colleagues and following institutional recommendations for blended learning.

Although the participant was nominated as an informal leader by the unit head, the account suggested a limited presence of peer influence dynamics observed in other transcripts. I therefore interpreted this account as a *contradiction* or *tension* (Braun & Clarke, 2022, p. 107). Examining this case clarified that informal leadership enactment was not automatic across contexts but depended on relational and institutional conditions such as peer receptivity, opportunities to demonstrate practice, and institutional environments that enabled or constrained contribution. This case functioned as an important counterpoint within the analysis.

Pattern survival testing indicated that most patterns identified in the initial participants' accounts continued to hold across the dataset. The account of Participant 12 functioned as a meaningful counter-case, clarifying the conditions under which informal leadership was less

visible. Several patterns also showed strong recurrence, particularly those related to the structural nature of hindering conditions and the way blended learning exposed institutional gaps that invited informal problem-solving.

Pattern Boundary Testing. I then examined how the patterns held across the final group of individual participants' accounts (Participants 16–20). This showed where patterns continued to recur and where their limits became visible. Some patterns appeared consistently across participants, supporting their interpretation as recurring aspects of the dataset, while others appeared in more qualified forms or were not reflected in certain cases, indicating that their boundaries required further clarification.

In examining these patterns across additional participants' accounts, I looked for where they continued to hold, where their meaning shifted, and where their limits became clearer. Some patterns held with little modification, while others required adjustment to better reflect how they operated across cases. In a few instances, patterns remained relevant but needed to be re-specified to account for differences in context. This helped clarify which patterns retained sufficient stability and explanatory value to be carried forward into the final insights.

Reviewing these patterns clarified which observations remained analytically robust. At this point, the focus shifted from examining recurrence to considering how the surviving patterns related to one another conceptually.

Boundary testing showed that many patterns held across diverse institutional contexts, particularly those related to structural constraints and institutional gaps. Some patterns shifted in meaning depending on scale, especially those concerning informality, legitimacy, and orientation. A small number of cases strained or extended the early patterns rather than

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contradicting them, and no major pattern collapsed under full-dataset testing. This indicated that the pattern set held across accounts.

An illustrative subset of pattern boundary testing is presented in Table 5.

Table 5

Subset of Pattern Boundary Testing on Participants 16–20

Pattern	Recurred	Strained	Disappeared
Legitimacy is located upward in policy guidelines or formal issuances, rather than in interpersonal validation.	P16, P20	P19	P17, P18
Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.	P17, P18, P19	P20	P16
Policy mandates without aligned conditions create strain.	P16, P18, P19	P17	P20 (more buffered by leadership support)

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Pattern	Recurred	Strained	Disappeared
Emergency or early experimentation gives way to stabilization or routinization.	P17, P19, P20	P16	P18
Blended learning indicates institutional gaps that invite informal problem-solving.	P16, P17, P18, P19, P20 (all) ! Extremely strong dataset-wide recurrence		
Leadership functions are enacted without naming a trajectory at all, simply doing the work that is needed.	P18, P19	P17	P16, P20

Note. Px: Participant number; ! = Analytically important observation.

A complete account of pattern boundary testing is presented in Table 13 (Appendix L).

Focus Group Alignment with Identified Patterns. I then examined the pattern statements in relation to the focus group accounts (Participants 07–10), following survival and boundary testing. At this stage, the focus group was not used to generate new patterns, but to consider how patterns developed from individual interviews were reflected within the participants' shared discussion. The focus group largely reinforced patterns related to

contribution-oriented practice, structural constraints, and institutional misalignment, with participants emphasizing helping, sharing, and problem-solving as key modes of influence. It added collective depth and contextual detail rather than introducing substantively different interpretations, underscoring how these patterns were normalized within everyday academic work. This supported the interpretation that these patterns were not limited to individual accounts but were also recognized within shared practice.

The focus group alignment with identified patterns is presented in Table 14 (Appendix L).

Analytic Pruning. At this point, I revisited the coded extracts, earlier pattern tables, and analytic memos to consider which patterns warranted further development and which overlapped or remained primarily descriptive. Pruning helped avoid carrying forward patterns that would weaken conceptual boundaries or duplicate analytic work, and ensured that the remaining patterns captured distinct and meaningful aspects of the dataset.

I approached pruning with considerations drawn from reflexive thematic analysis (Braun & Clarke, 2022, pp. 98–99). I assessed how patterns recurred across participants' accounts, treating recurrence as evidence of patterned meaning rather than simple frequency. I also considered their explanatory value, retaining patterns that helped explain how informal faculty leadership was enacted and shaped, while folding more descriptive observations into broader constructions. I considered boundary clarity, examining whether each pattern could be clearly distinguished from the others without substantial overlap. I also considered how each pattern related to the research questions, prioritizing those that contributed directly to understanding how leadership was enacted and shaped by conditions, legitimacy, and constraints. These considerations supported refining the pattern set toward greater analytic coherence.

Pattern Clustering. Following pruning, I examined the 17 retained patterns in relation to one another, considering how they worked together to make sense of informal faculty leadership in blended learning. Rather than grouping patterns by topic alone, I focused on what each pattern was doing analytically in relation to the research questions, particularly how informal leadership was enacted, how influence became possible, and how these processes were shaped by institutional conditions. As I analyzed the patterns, I stepped back to consider how these groupings related to one another. What began to take shape was not a set of categories but an interconnected set of analytic strands that addressed different aspects of the phenomenon.

One set of patterns pointed to what leadership looked like in practice. Across participants, leadership was described in terms of contribution, problem-solving, and action, rather than identity or formal role. I came to understand this grouping as *enactment*, where leadership was carried out through what faculty did in response to immediate needs.

Another set of patterns highlighted how influence became possible within these practices. Influence appeared relational and lateral, depending on uptake rather than authority. What stood out was how contingent this process was. Influence was not assumed but depended on whether others chose to engage. I interpreted this grouping as the *mechanics of informal influence*, capturing how influence moved and why it remained uneven.

A third set of patterns situated these practices within the context of blended learning. Blended learning was consistently described as infrastructure developing under constraint, where gaps, limitations, and the demands of continuity shaped practice. These patterns helped explain why leadership took the form of practical problem-solving rather than formal coordination. I understood this grouping as the *conditions shaping practice*.

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A further set of patterns pointed to how these conditions shaped what was possible, as well as how participants positioned themselves in relation to formal leadership. Structural constraints and institutional misalignment appeared to shape both practice and stance. This helped explain why informal leadership persisted as a necessary response and why it remained fragile and unevenly supported. I interpreted this grouping as the *outcomes of these conditions*.

Details of the patterns included in each cluster are presented in Table 16 (Appendix L).

I began to see how these groupings worked in relation to one another. Blended learning under constraint created gaps that required a response. Structural misalignment shaped how those gaps were experienced and sustained. Informal leadership developed through contribution and problem-solving within these conditions, while influence depended on relational uptake and consent.

Cluster Validation and Naming of Interpretive Insights. To further examine these groupings, I wrote brief analytic definitions for each cluster to consider whether they held as distinct patterns of shared meaning. This involved checking whether each cluster had a coherent core, whether its boundaries could be maintained, and whether it remained analytically distinct from the others. In doing so, I considered what each cluster foregrounded and what it left in the background.

Working through these definitions clarified that each cluster captured a different aspect of the phenomenon. One cluster centered on how leadership was enacted through contribution and problem-solving. Another focused on how influence became possible through relational, consent-based processes. A third situated these practices within the context of blended learning as infrastructure under constraint. The fourth connected structural conditions to how participants positioned themselves in relation to leadership. This confirmed that the clusters held as distinct

but related analytic groupings. It also clarified how they worked together, which supported the development and naming of the final insights.

These analytic decisions resulted in four interpretive insights:

1. Informal Leadership as Contribution-Oriented Practice
2. Legitimacy and Consent in Informal Influence
3. Blended Learning as Institutional Infrastructure Under Constraint
4. Informal Leadership as a Response to Institutional Misalignment

An illustrative subset of these pruning and clustering decisions is presented in Table 6.

The analytic placements shown reflect how patterns were grouped within the clusters of enactment, mechanics, conditions, and outcomes.

Table 6

Sample Pruning and Clustering Decisions

Pattern	Decision	Analytic Rationale	Analytic Placement
Blended learning enters as a solution to constraints	KEEP	Recurrent across early and later cases; analytically distinct from pedagogical ideology framing.	Structural Entry Conditions
Informal leadership appears necessary but structurally unsupported	KEEP	High explanatory breadth; synthesizes structural strain, compensatory contribution, and legitimacy tensions.	Structural Misalignment

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Pattern	Decision	Analytic Rationale	Analytic Placement
Policy mandates create strain	FOLD	Conceptually overlapping with broader structural hindering conditions.	Integrated into broader Structural Hindering Conditions pattern cluster
Influence is displaced upward or outward	FOLD	Conceptually overlaps with enactment and legitimacy; retained as a supporting feature rather than a standalone pattern.	Mechanisms of Influence
Emergency experimentation gives way to stabilization	PARK	Present but insufficient cross-case density as standalone explanatory pattern.	Retained in audit trail; not advanced independently
Informality enables flexibility but limits authority	KEEP	Suggests dual function of informality across cases; survived boundary testing.	Conditions of Informality

Note. This table presents selected pruning and clustering decisions from boundary confirmation and consolidation. Entries are presented to reflect analytic judgment and conceptual development rather than to follow a categorical ordering.

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The complete account of analytic pruning decisions is presented in Table 15 (Appendix L). A full record of the analytic process, including pattern survival testing, boundary testing, and pruning and clustering decisions, is provided in Appendix L.

With the interpretive insights in place, I turned to writing as a way of working through and further clarifying their meanings.

Writing as Part of the Analytic Process

Writing was part of how I worked through the analysis. Moving back and forth between interview transcripts, coded extracts, and earlier memos allowed me to reconsider how different observations related to one another. Ideas that had appeared separate during coding began to connect as I tried to explain them in writing.

One pattern became clearer as I progressed through this stage. Participants often returned to the constraints surrounding blended learning practice. Although the study initially considered both supporting and hindering conditions, participants' accounts repeatedly shifted toward the practical difficulties involved in sustaining blended learning within existing institutional arrangements. Writing these sections helped me reconsider how these conditions shaped what faculty were able to do in practice.

Looking across the patterns clarified how earlier observations were related. Informal faculty leadership came to be understood not only as a form of peer influence but also as a practical response to gaps in institutional systems supporting blended learning. Faculty members described stepping in to stabilize processes, assist colleagues, or make blended learning workable in situations where institutional structures were still developing. This shift in interpretation brought greater coherence to the developing patterns by situating them in relation to institutional conditions rather than as isolated observations. My own experience in similar settings also

shaped how I connected these patterns, particularly in seeing informal leadership as a response to gaps in the system.

These reflections helped me see how patterns identified during earlier phases of analysis were connected and guided the development of the interpretive insights presented in the following section. In this way, writing functioned not only as a means of presenting the analysis but also as a site where interpretive connections were actively constructed.

Key Insights Shaping the Analysis

Through the analytic process described earlier, four interrelated interpretive insights were developed. Together, the insights explained how informal faculty leadership in blended learning was enacted, how influence became legitimate among peers, how these practices unfolded within institutional conditions, and how faculty responded to gaps between institutional expectations and available support.

The first insight examined how informal leadership was enacted through contribution-oriented practice in everyday teaching and collegial interaction. The second insight explored how legitimacy and consent shaped whether these contributions influenced colleagues' practices. The third insight situated these practices within the institutional environment, interpreting blended learning as infrastructure operating under constraint. The fourth insight interpreted informal faculty leadership as a response to institutional misalignment, where faculty stepped in to stabilize processes when institutional structures did not fully support the work required to sustain blended learning.

The sections that follow present these four insights in detail.

Insight 1: Informal Leadership as Contribution-Oriented Practice

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Across participants' accounts, I repeatedly encountered descriptions of informal faculty leadership in blended learning enacted through practical contribution rather than through formal authority or explicit claims to leadership. Leadership was described as concrete actions directed toward making blended learning workable in everyday contexts.

During the pandemic transition to remote learning, The University System institutionalized the development of *course packs* to support instruction. These packs included course guides, learning resources, activity guides, and assignments designed for adaptation and reuse across units (Bautista, 2020). As in-person classes gradually resumed and the university shifted toward blended learning, this practice remained in place and became embedded as a core instructional resource. Participants described how faculty designed and circulated blended learning materials, creating space for informal leadership through the development and sharing of instructional artifacts.

Participants frequently described informal leadership as enacted through the development and sharing of usable materials and workable approaches. Participant 15 explained:

What I did was draft a course pack with that scheme in mind, that you can do blended learning as well, and it's now adopted at University C. I am also sharing that course pack with my colleagues before in University E.

In this account, I interpreted leadership as enacted through the creation of concrete artifacts that circulated across contexts. The course pack served as a transferable resource that colleagues could adopt in their own contexts without having to design materials independently.

Leadership was not enacted only through the production and circulation of artifacts. Participants described leadership as developing through direct engagement with colleagues' pedagogical and technical concerns. Participant 01 explained:

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The leadership part ... started when I started doing services to individuals outside my department, because everyone's asking... How do you address this kind of problem inside the classroom? It did not start with telling them how to do blended learning. It started with telling them how to create solutions inside their classrooms.

In this instance, leadership appeared to be enacted through situated problem-solving rather than through formal instruction or positional authority. Participants recounted how influence developed when colleagues voluntarily sought assistance in resolving practical classroom challenges. In these moments, leadership was enacted through responding to colleagues and sustained through collegial engagement rather than through directive control.

Participants made references to modeling enacted practice as another form of contribution-oriented informal leadership. Participant 04 explained:

I shared my site and showed others how I did the activities that I incorporated to enhance the students' learning ... some faculty members would also ask for resources, particularly the course packs and the activities that I included.

Here, influence appeared to operate through observable action rather than direct instruction. By making her course site and activity design visible, the participant allowed colleagues to observe and adapt workable practices within their own contexts. I interpreted this as influence operating through example, with uptake grounded in perceived usefulness rather than positional authority.

I also noted how contribution-oriented leadership appeared within collegial planning processes. Participant 17 described how blended learning decisions were discussed collectively:

Since we do team teaching in the courses, we as a team will talk about it before the semester starts, so that we'll be able to deploy it in a better way... But in a course where

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I'm the only one teaching ... on my part, I'll ask another faculty, do you think this would be good?

In this account, leadership appeared within shared instructional planning. Participants described influence developing through dialogue and mutual deliberation rather than directive authority. Even when teaching alone, the participant described seeking peer input, which suggests that contribution-oriented leadership operated through consultation without requiring formal coordination or collective mandate.

Participants noted that informal contributions also occurred through routine collegial interaction. Participant 14 reflected: “Usually during lunch or during break time, when we're tired, we group together, and then we share our frustrations... we exchange notes. I think that was the informal leadership part.” Here, the participant described informal leadership as developing through everyday conversational spaces where faculty exchanged ideas, frustrations, and practical solutions. I interpreted this as influence that developed within informal settings, embedded in ordinary academic interaction rather than formal structures.

Across these accounts, leadership appeared to develop through doing, often without being explicitly named as such by participants themselves.

Participants also emphasized that these contributions were grounded in their own teaching experience. In interpreting these patterns, I drew on Lewin's (1947, 1951) perspective to consider how practice is shaped by competing pressures within a system. These actions took place in contexts where immediate instructional needs pushed practice forward, while workload and institutional limitations constrained what could be sustained. Participants framed their actions as responses to immediate needs, requests from colleagues, or gaps in existing systems, rather than presenting themselves as leaders. In several accounts, influence became visible over

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time as colleagues began to rely on their assistance. Participant 06 noted: "...whenever they have questions on the Moodle environment, I'm the first one they ask, because I usually set up the Moodle environment for a lot of my colleagues, especially for those that I teach the course with." In this instance, leadership was not self-claimed but was attributed through repeated reliance by colleagues. I interpreted this form of enactment as emphasizing usefulness and proximity to practice, with leadership becoming visible through sustained contribution rather than through formal designation.

Across accounts, participants frequently downplayed their leadership actions. Many described themselves as "just helping" or "sharing what worked," even when those actions had wider effects. Participant 12 explained:

I do not see myself as an influencer or leader in that sense. I just wanted to teach ... And when the idea came that blended learning is a possibility ... if lecturers and professors use the blended learning modality, I think I just managed to somehow use the same.

(Participant 12)

Although the participant contributed to blended learning initiatives, this participant resisted adopting a leadership identity. This hesitation to claim a leadership identity seemed to reinforce the informal nature of the enactment and distinguish it from role-based or hierarchical leadership.

Contribution-oriented blended learning practice was frequently described by participants as demanding sustained time and attention. Participant 01 reflected on the workload implications: "The load does not make you present... how will you become mentally present to help other individuals when you also have so much load?" This observation highlighted the relational demands of contribution-oriented leadership. Across accounts, the act of supporting

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colleagues required mental presence and availability that were difficult to maintain alongside existing responsibilities and workload arrangements.

Contribution-oriented enactment did not automatically translate into influence.

Participants could act in ways that supported blended learning practice without those actions necessarily shaping the practices of others. At this level of interpretation, leadership was defined primarily through action rather than by outcome.

These patterns align with distributed leadership perspectives, which view leadership as developing through professional practice rather than being confined to formally designated roles (Spillane, 2006). Participants engaged in troubleshooting instructional challenges, sharing resources, and modeling blended learning practices as part of their everyday teaching work. In this way, influence appeared to develop through contribution and practice rather than through positional authority.

In some accounts, leadership did not appear as something participants explicitly identified or reflected upon, but as work that was carried out in response to immediate needs. Participant 05 described this orientation simply: “You know what, I’ll just do it. And then when I do it, I’ll share.” This framing shifts attention from leadership as a role or identity toward contribution as an ongoing form of work. The sequence described, doing first, then sharing, which suggests that what might later be recognized as leadership is embedded in completing the task rather than intending to lead. In this sense, leadership was not only unclaimed but, at the point of enactment, not conceptualized as leadership in the moment.

Taken together, these accounts supported the interpretation of informal faculty leadership in blended learning as primarily enacted through contribution-oriented practice. Leadership was embedded in everyday work, oriented toward solving practical problems, and often remained

unclaimed by those who enacted it. These contributions formed the basis from which influence later developed particularly in contexts where institutional supports were uneven and such work responded to practical gaps.

Insight 2: Legitimacy and Consent in Informal Influence

As I examined participants' accounts alongside the previous insight, contribution-oriented practice alone did not ensure influence. Although faculty frequently described helping colleagues, sharing materials, or demonstrating practices, these actions did not automatically shape others' teaching practices. I interpreted influence as depending on whether colleagues chose to accept, engage with, or adopt the contributions being offered. I therefore understood recognition and uptake as central to establishing legitimacy in this study. In interpreting this, I drew on Lewin's perspective to consider how acceptance or resistance within the social environment shaped whether influence was taken up. Colleagues' receptivity supported influence, while hesitation or reluctance limited the extent to which contributions could be extended. Participants described influence as developing when colleagues perceived a contribution as useful for their own teaching. This reflected legitimacy developing through observable practice rather than through formal designation.

Legitimacy as Recognition. Influence often began when colleagues observed an effective practice and initiated inquiry. This suggested that demonstrated competence was a basis of legitimacy. Participant 03 described this dynamic: "I incorporated that in my class, and some of my colleagues saw what I did and asked me ... how I did that ... so I explained to them." In this account, legitimacy appeared to arise through visible enactment in practice. Asking how the approach was implemented signaled recognition of competence. This reflected influence

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unfolding through peer acknowledgment and voluntary engagement rather than through formal mandate.

Participants described how sustained involvement in training, implementation, and course design gradually positioned them as credible reference points within their institutions. This suggested that experience with blended learning also shaped how legitimacy was attributed.

Participant 16 explained:

Mostly it's been experience. I've been helping around with blended learning, training new faculty, since I was in another university ... I just carried that over ... I'm already considered an expert by the university, a reference person, if you will. It's a lot easier for you to get noticed and asked for help if you already have labels, you're a subject matter expert in this.

Here, legitimacy appeared to accumulate through sustained engagement that eventually became institutionally recognized. Being identified as a "reference person" lowered the threshold for uptake, as colleagues approached the participant with assumed credibility.

Trust developed gradually through repeated assistance in everyday instructional challenges, particularly during periods of institutional transition when formal support was limited. Participant 20 reflected on earlier efforts to help colleagues adopt presentation technologies:

It was a gradual change... 2008, 2009, 2010, when faculty members were asking to be taught how to use PowerPoint... I still remember those times when every time someone would lecture, they would call on me and ask if I could help them... I would need to go to the room. And we didn't even have an IT then... But after around two years, everyone

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had a laptop already. Everyone was already using PowerPoint. Eventually, they appreciated it.

In this narrative, credibility developed through sustained presence and responsiveness across time. Influence accumulated as colleagues came to rely on practical assistance during a period of institutional transition.

In contexts where faculty collaborated within the same department or course, influence came about through ongoing conversation rather than individual initiative. I interpreted this as indicating that legitimacy was reinforced through proximity to shared practice. Participant 17 described this dynamic:

In our department... we actually share good practices in the class... it's easy for us to have conversations about this. For example, is it better to make it a small group discussion or a forum in Canvas? Since we do team teaching in the courses, we as a team will talk about it before the semester starts, so that we'll be able to deploy it in a better way.

In this account, influence developed through shared instructional responsibility. This suggested that when faculty worked closely within the same course or department, informal leadership took shape through dialogue and joint deliberation rather than through formal authority.

Consent and Voluntary Uptake. Some participants emphasized that colleagues ultimately chose whether to follow their suggestions. I interpreted this to mean that informal influence, therefore, operated laterally rather than hierarchically. In this interpretation, without formal authority, participants could offer guidance, but adoption depended on colleagues' willingness to engage. Participant 03 described this dynamic:

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I just share them to those faculty that are willing to learn, that are willing to change ... I have observed that there are some faculty that do not want to incorporate this and that ... so I just share them to those optimistic about these technologies.

I interpreted this to mean that contribution alone did not produce compliance; it required openness and voluntary engagement from colleagues. It underscored for me the contingent nature of informal influence. Informal leadership appeared to depend on consent, not directive authority.

Participants described recognition from peers as reinforcing one's willingness to continue contributing. Participant 04 reflected: "When colleagues appreciate what you do, I think it motivated me to use blended learning more often..." I interpreted this as indicating that peer acknowledgment strengthened confidence and motivation, encouraging continued contribution.

Uneven and Context-Dependent Legitimacy. Several participants described situations in which their contributions were influential in some contexts but carried less weight in others, even within the same institutions. I understood this as an indication that legitimacy was uneven and highly context dependent.

Participant 11 described navigating these dynamics carefully:

My approach is different among my colleagues. Sometimes, in dealing with the more senior ones I will just listen and I'll just interject every now and then. Then among peers, I would wait if the discussion would be open, and if it is a safe space to share. I am just surprised when, [on] some occasions of our casual conversation, they would inform me that they have adopted what I have shared. So that will be some sort of validation ...

This led me to interpret legitimacy as being shaped by hierarchy, relational safety, and situational context. Influence appeared to be neither automatic nor uniform. Contributions may have been

adopted quietly or retrospectively, reinforcing that informal influence operated through negotiated consent rather than role-based authority.

Participants also described situations in which their contribution was acknowledged but did not translate into sustained influence. Participant 16 explained: “We can’t really help them, unless they ask for help... they’d be interested a bit, but it’s just at that superficial level.” These accounts clarified my understanding of the distinction between enactment and influence, demonstrating that informal leadership could be present even when uptake remained limited or temporary.

These participants’ accounts reflect the relational nature of leadership emphasized in distributed leadership perspectives. Within distributed leadership theory, leadership is understood as a form of practice distributed across interactions among professionals rather than confined to hierarchical authority (Spillane, 2006). In this study, legitimacy appeared to develop through demonstrated competence and sustained collegial engagement rather than through formal designation.

Considered together, these accounts led me to interpret informal influence in blended learning as dependent on legitimacy and consent. Leadership enacted through contribution became influential only when colleagues recognized its value and chose to adopt it. This helps explain why informal leadership appeared uneven across contexts and why influence remained fragile even when contributions were consistent.

Insight 3: Blended Learning as Institutional Infrastructure Under Constraint

As I examined participants’ accounts across the dataset, only a few described blended learning as a pedagogical innovation or instructional enhancement. Instead, participants frequently spoke of blended learning’s function as a contingency measure and a form of

institutional infrastructure that needed to function reliably under ongoing constraints. In this interpretation, infrastructure refers to a supporting system situated in everyday university operations and necessary for sustaining instructional continuity. In interpreting these accounts, I drew on Lewin's (1947, 1951) perspective to consider how practice is shaped by the conditions within which it takes place. In this study, the need to sustain instructional continuity appeared to drive practice forward, while limitations in infrastructure, policy, and support shaped what could be achieved in practice.

Blended Learning as Continuity Infrastructure. Participants often described blended learning as being activated in response to institutional disruption. Participant 03 reflected: "Sometimes they declared no classes... for a week long, two weeks long, or a month long... so we are prompted to offer our classes online." In interpreting this account, blended learning appeared as a continuity mechanism that was mobilized when normal campus operations were interrupted. Rather than functioning as an optional instructional approach, it became a system-level response to disruption.

Similar descriptions appeared in several accounts. Participant 04 explained: "Since the past few months, we've had a lot of typhoons ... we had to cancel classes. The blended learning setup was really helpful; we use it all the time." Participants also cited extreme heat, earthquakes, transportation strikes, and viral outbreaks as situations where blended learning enabled the continuation of teaching despite suspended in-person classes. Participant 04 added: "Because of the calamities that we experience... I think blended learning helps... students are still able to... do schoolwork despite the inability to have face-to-face classes."

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Across these examples, blended learning appeared less as innovation and more as operational backbone. My interpretation is that it functioned as a contingency system that enabled teaching and learning to proceed despite disruption.

Layered Systems and Infrastructural Fragility. The infrastructural nature of blended learning was also evident in the way participants referred to platforms, processes, coordination, and support arrangements. One focus group participant described how institutional archiving and repository systems supported ongoing implementation:

The faculty can just simply go to the folder, and thankfully, our chair also made a whole website, a whole repository of all those archives. They've been arranged properly per subject, and per module. It has really facilitated a lot of the needed actions and practices that we need to do to incorporate blended learning (Participant 10, Focus Group).

In these accounts, organized repositories and shared archives appeared to reduce duplication and support instructional continuity. Implementation depended not only on individual effort but also on coordinated technical and administrative systems.

Participants described blended learning work as involving navigation of learning management systems, aligning course design with institutional requirements, and compensating for gaps in technical, administrative, or pedagogical support. These activities relied on the coordinated functioning of multiple interconnected systems. When a core component failed, the work did not simply pause but shifted into contingency and rework. Participant 18 explained: "...if the internet is bad, everything you planned is gone, and it's such a waste." Similarly, Participant 08 described a campus-wide Wi-Fi shutdown:

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...all the major university Wi-Fi shut down... I had a very important activity back then. I even tried to connect to LTE, and internet in the campus is really terrible. We had no choice but to move the activity. I felt defeated, not just me, but the students as well. When connectivity failed, instructional plans quickly unraveled. Activities were rescheduled, and both faculty and students absorbed the disruption. Planning therefore remained exposed to infrastructural instability.

These accounts illustrate how blended learning functioned as infrastructure. A failure in a core system had immediate pedagogical consequences. The emphasis was not on innovation, but on sustaining instruction under unstable conditions.

Policy Constraint and Institutional Interpretation. Constraints were not limited to technological instability or workload pressures. In some instances, infrastructure was available but underutilized because of restrictive policy interpretation. As Participant 16 explained:

It's an information technology classroom... the internet is strong... But the policy is not really that enabling... The room is there, and the resources are stagnating. If it's not a class, the expectation is nobody should be using it... It's a very narrow interpretation of the policy... The building admin isn't really into blending. What they understand is that if there are just a couple of people in the room, it's not an official class... If they're there, and we're not there, even if it's an official class... because it's blended... sometimes they get chewed off.

In this account, infrastructural constraint did not arise from a lack of resources but from the ways policies were interpreted and enacted. Although technological and physical resources were available, their use was restricted by administrative gatekeeping. Infrastructure, therefore, depended not only on material availability but also on how institutional actors interpreted rules.

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When blended arrangements did not align with conventional expectations of what counted as an official class, access became constrained.

Temporal Fragility and Compressed Instruction. Participants also described how recurring disruptions introduced temporal fragility into blended learning practice. Even when technological systems were functioning, repeated class cancellations compressed instructional time and limited opportunities for deeper learning. Participant 14 reflected: “During this time, there were a lot of cancellations due to the earthquakes... due to storms. And then when exams come... I was not satisfied with their answers... If I had enough time, I would have been able to make them appreciate this concept.”

Here, instructional continuity was preserved, yet pedagogical depth was constrained. Blended learning enabled classes to proceed despite interruption, but recurring instability shortened instructional cycles and restricted opportunities for conceptual engagement. I interpreted this to mean that the constraint was temporal rather than technological. These descriptions reinforced the interpretation of blended learning as infrastructure operating under pressure rather than as a reform implemented under stable conditions.

Blended Learning as a Site of Institutional Pressure. Blended learning also appeared as a site where institutional pressures became visible in everyday teaching practice. When systems did not fully support routine teaching and learning, faculty often stepped in to stabilize processes and assist colleagues in navigating practical difficulties. In these situations, leadership was enacted not to promote blended learning as innovation, but to make it workable as infrastructure. I understood this as work shaped by the conditions within which faculty were operating. Informal leadership functioned as a way of responding to existing limitations so that instructional work could continue.

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I find this interpretation of blended learning as infrastructure consistent with research on educational change and implementation. Such research emphasizes that the success of instructional innovations depends on the institutional conditions that support their use (Fullan, 2007). In participants' accounts, blended learning was rarely described as a discrete innovation. Instead, it appeared to function as part of the institution's instructional infrastructure, with its effectiveness shaped by the reliability of technological systems and by the organizational and logistical conditions surrounding everyday teaching practice.

These accounts led me to interpret blended learning as institutional infrastructure operating under constraint. In this environment, sustaining instructional continuity required ongoing adjustment, and faculty often stepped in to address gaps in coordination, support, and implementation. Informal faculty leadership developed through these responses, as faculty worked to make blended learning workable under existing conditions. This interpretation helps explain why informal leadership practices appeared widespread yet uneven across contexts and leads to the final insight examining institutional misalignment.

Insight 4: Informal Leadership as a Response to Institutional Misalignment

Across participants' accounts, I observed a recurring gap between expectations to deliver blended learning and the structures, resources, and authority available to support that work. Within this gap, informal faculty leadership appeared as a practical response. Rather than emerging from enabling institutional conditions, it often developed because existing arrangements were insufficiently aligned with the demands of blended learning practice.

Misalignment appeared in multiple forms. Participants described mismatches between workload expectations and available support, between responsibilities and decision-making authority, and between institutional policies and local practice. Faculty were expected to sustain

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blended learning initiatives, respond to student needs, and support colleagues without corresponding adjustments to workload, recognition, or infrastructure. In many accounts, informal leadership developed as faculty attempted to address these gaps through their own actions and relationships.

This pattern became more visible when participants described how their actions were prompted by gaps in existing systems or practices. One participant explained this directly: “There is a gap... and I try to fill those gaps if I see that nobody else would” (Participant 05). Here, action was not organized around formal responsibility or planned leadership trajectories, but around perceived absences in the institutional environment. Leadership functions were taken up in response to what is missing, rather than what was assigned. This reinforced the interpretation of informal leadership as a situated response to misalignment, where contribution emerged as a practical means of sustaining work in the absence of sufficient structural support.

Misalignment was also visible in how participants perceived institutional priorities. Several participants expressed uncertainty about whether blended learning was strategically valued within the broader university system. Participant 05 reflected:

I think the biggest hindering condition is that from their actions and policies, I get the impression this isn't a priority... exploring modalities of instruction or moving to blended learning feels more like begrudging tolerance. We are surviving because of the faculty... despite the lack of a strategy moving toward a stronger learning modality” (Participant 05).

In interpreting this account, institutional commitment appeared to be evaluated through enacted priorities rather than through formal policy statements. Participants interpreted the gap between

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policy language and operational support as evidence that blended learning was accommodated rather than structurally prioritized.

This perception was reinforced by accounts describing diminishing institutional investment after the pandemic. Participant 02 explained:

This is my personal observation... the training on what kind of tools to help us do the online instruction better, it disappeared... It stopped there, because in blended, the faculty now has the option whether to go on full face-to-face or go into blended... It seems to be actually shifting back to traditional mode again (Participant 02).

Here, the withdrawal of sustained training was interpreted as a signal that institutional attention was shifting away from blended learning. Although the modality remained available, the reduction of structured support suggested a gradual return to traditional instructional modes.

Participant 18 similarly reflected on this perceived regression:

It's sad. It's like we're going back to the old ways, when we saw the advantage of doing both ... Well, if there's no internet, we don't really have a choice. But the thing is ... it's a good mode of teaching, mode of learning. And to some students, it's actually the better mode" (Participant 18).

This account highlighted the tension between institutional direction and faculty perceptions of blended learning's pedagogical value. Although blended learning had functioned as continuity infrastructure during crisis conditions, participants perceived that it was not consolidated as sustained institutional reform.

Within these conditions, many participants described assuming leadership-like responsibilities without formal mandates or structural backing. Participants reported coordinating colleagues, advising on course design, troubleshooting institutional systems, and serving as

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informal reference points for decision-making and process stabilization. Because these roles developed in response to immediate needs, they were rarely accompanied by formal authorization, defined authority, or institutional recognition.

Participants therefore performed leadership work without additional time, compensation, or formal decision-making authority. Institutional supports commonly associated with formal roles, such as reduced teaching load, administrative assistance, or budget allocation, were generally absent. In several cases, participants also described absorbing personal expenses to sustain blended learning initiatives.

The absence of structural backing was also linked to the lack of coordinated leadership across institutional levels. Participant 19 observed:

If you have well-functioning instruction committees at the system, university, and college levels, those committees could champion blended learning. You would have advocates at different levels of the university. But if there's no such leadership or modeling outside the college, you couldn't blame those at the department level for losing steam. Especially if they don't get any credit for it other than one raw point come promotion time, and yet they do a lot of work. That connects again to workload" (Participant 19).

In this account, sustaining blended learning appeared to depend on coordination across system, university, and college levels. Without visible institutional advocacy beyond the department, participants described momentum weakening over time. The reference to minimal promotion credit further underscored the mismatch between effort and institutional recognition.

Under these conditions, several participants expressed ambivalence toward formal leadership roles. This hesitation did not reflect a rejection of leadership itself but rather a concern that formal roles would increase responsibility without providing additional support. Participant

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13 articulated this concern when describing the circumstances under which she would consider accepting a formal leadership role related to blended learning: “If I have the space, and then internet connectivity, and then they will provide me a laptop with very good specifications ... a good sound system ... I think it’s more on the gadgets and the connectivity”. In this account, willingness to assume leadership responsibilities was tied directly to infrastructural readiness. The issue was not motivation or competence but whether institutional arrangements provided the material conditions necessary to sustain the work.

Similar dynamics appeared in accounts predating the pandemic. Reflecting on earlier efforts to introduce blended approaches, Participant 20 explained:

I guess the lesson there is, even if you have a very good program, if the structures are not really ready and are not in place, it's still difficult to implement it. But if the structures are, you have the support, and then it's in place, the processes are institutionalized, it's easy for the faculty to implement.

In this account, informal leadership developed not from formal mandate but from the absence of enabling structures. Implementation depended on local initiative where institutional arrangements had not yet been established.

Participants also described forms of structural friction rather than outright absence of policy. In the focus group discussion, administrative procedures and reimbursement processes were described as slow and discouraging. Participant 07 noted that obtaining resources often required navigating “so many hoops to jump through,” involving repeated approvals and documentation.

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In interpreting these accounts, the challenge did not lie in the absence of policy but in the difficulty of navigating institutional processes. Administrative procedures consumed time and energy, slowing implementation and discouraging initiative.

Participants also described situations in which initiatives relied on personal financial investment. Participant 08 remarked that some activities became “personal charity work,” as faculty advanced projects using their own resources while waiting for institutional reimbursement. Participant 09 described purchasing equipment personally and lending it to colleagues: “I even bought lights... and I lent them to colleagues because they didn’t have the proper setup” (Participant 09, Focus Group). In these situations, compensatory effort extended beyond time and labour to include personal financial contributions. Blended learning could still occur, but its continuation depended on individual willingness to absorb costs and navigate institutional delay.

Two participants independently invoked the metaphor of bibingka, a Filipino rice cake cooked with heat from both above and below, to describe the need for alignment between institutional leadership and conditions on the ground. In their accounts, the metaphor illustrated how blended learning initiatives require simultaneous support from institutional leadership (“top fire”) and everyday faculty practice (“bottom fire”).

Participant 11 explained:

If you will allow me to localize and indigenize my description, if I am to quote Borras, it’s like a bibingka strategy. There’s fire on top and fire at the bottom. There are exertions and efforts from below, and counterpart initiatives and interventions from above.

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Through this metaphor, Participant 11 emphasizes reciprocity rather than hierarchy. Faculty effort must be matched by institutional initiative for blended learning to develop sustainably, and alignment is understood as mutual reinforcement rather than a unilateral directive.

Participant 19 similarly invoked the bibingka metaphor when describing coordination across institutional levels:

Why can't there be a System Committee on Blended Learning? You can have that at the system level, and then each autonomous university is represented. It goes down all the way. Or also, I mean, bibingka - from the ground, you could get the necessary, relevant information on what would help policy, recognition, incentives, or whatever support would be given.

In this interpretation, the metaphor extends beyond imagery to describe institutional coordination across system, university, and departmental levels.

Taken together, the accounts of Participant 11 and Participant 19 have led me to interpret misalignment not as a failure of effort, but as a lack of coherence between institutional direction and grounded practice. In my understanding, informal leadership, as described by participants, was characterized by fragility because of its reliance on individual effort rather than durable institutional support. Participants have described informal leaders as having relied on personal initiative, goodwill, and ongoing negotiation, which has made them vulnerable to exhaustion, turnover, or shifting priorities. While these practices allowed blended learning to function in the short term, they were often described as difficult to sustain over time. In this sense, I inferred informal leadership as having functioned as a compensatory mechanism that enabled continuity without resolving the structural conditions that made such compensation necessary.

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I interpreted these tensions using Lewin's (1947, 1951) perspective to understand how practice is shaped by the balance between forces that push for change and that hold existing conditions in place. In this study, institutional expectations to sustain blended learning acted as pressures encouraging change, while limitations in workload allocation, infrastructure, authority, and recognition shaped what could be carried out in practice. Informal leadership practices often appeared in response to these conditions, as faculty worked to navigate the gap between expectations and institutional realities.

My interpretation of informal faculty leadership in blended learning as a structural response to institutional misalignment rather than a discretionary initiative was based on the accounts of the study participants. In my mind, leadership practices arose to address gaps between expectations and available support, persisted because those gaps remained unresolved, and remained informal because institutional alignment had not yet been achieved. Informal leadership, therefore, appeared necessary in practice, yet remained uneven across contexts and uncertain in its long-term sustainability.

This interpretation provided the foundation for the next chapter, where I examine how these insights relate to existing scholarship and consider their implications for institutional capacity-building.

Summary

In the first part of this chapter, I reflected on how my understanding of the dataset developed through the analytic process. Drawing on Braun and Clarke's reflexive thematic analysis, I described how I moved through the iterative and recursive phases of familiarization, coding, pattern generation, refinement, and naming of those patterns. In doing so, I also reflected

on the uncertainties, analytic decisions, and moments of reconsideration that shaped how the interpretations gradually took form.

I developed four interpretive insights from this analytic process. These insights described informal faculty leadership as enacted through contribution-oriented practice, shaped by legitimacy and consent in peer relationships, situated within blended learning as institutional infrastructure operating under constraint, and emerging in response to institutional misalignment.

The next chapter examines these insights in relation to existing scholarship and considers their implications for blended learning and institutional capacity-building.

Chapter 5. Discussion

Re-situating Informal Faculty Leadership in Blended Learning

In this chapter, I discuss the interpretive insights presented in Chapter 4 and consider their implications for understanding and supporting informal faculty leadership in blended learning. I examine how the conditions identified in this study shape the persistence and fragility of informal leadership in blended learning contexts, situate these interpretations within existing scholarship, and consider their implications for institutional capacity building.

Three complementary theoretical lenses guide this discussion. Distributed leadership provides an overarching frame for understanding leadership as practice distributed across actors and situations. Informal and grassroots leadership literature offers a lens for examining how influence is enacted without formal authority. Lewin's (1947, 1951) force field perspective serves as a structural lens for interpreting how institutional conditions shape the enactment of informal leadership.

In this study, informal faculty leadership in blended learning is interpreted as developing in response to misalignment. These situations occur when expectations for blended learning exceed the structures, resources, and authority available to support that work. This interpretation is consistent with distributed leadership perspectives that conceptualize leadership as practice stretched across formal and informal leaders, their followers, and situations (Spillane, 2006). However, distribution alone does not fully explain how leadership is sustained when institutional conditions are uneven. Drawing on a force field perspective, informal faculty leadership in blended learning is interpreted as a practice situated within and shaped by conditions that enable or constrain its enactment.

My interpretation of these conditions is informed, in part, by my professional experience in distance and blended learning, where institutional expectations and implementation constraints are often negotiated in practice. This proximity heightened my sensitivity to how participants described compensatory effort not as exceptional, but as embedded within routine academic work. As a faculty member within the same university system, I was also aware that participants' accounts of institutional constraints reflected shared policy and organizational conditions.

Recent studies of blended learning implementation in Philippine higher education point to persistent institutional constraints, including uneven infrastructure, limited technical support, and challenges in faculty readiness, which continue to shape teaching and learning conditions (Alvarez, 2020). Research on digital equity similarly highlights how uneven access to technology and infrastructure affects the sustainability of digitally mediated learning environments (Caparas & Yango, 2023).

In this study, these institutional conditions are interpreted not only as barriers to implementation but as factors that influence how informal leadership is enacted in practice. Participants' accounts suggest that informal leadership was not only relational and emergent but also shaped by the need to sustain blended learning under conditions of uneven institutional support. Informal leadership persisted under these conditions, but unevenly and often at personal cost.

Understanding informal faculty leadership through the lens of misalignment has implications for how capacity building is conceptualized. It shifts attention from informal leadership as an individual initiative to a practice shaped by the institutional conditions under which such leadership is enacted and sustained. The analysis suggests that rather than focusing

solely on developing individual competencies, capacity-building efforts may need to account for the institutional arrangements that determine whether informal leadership can be sustained over time.

Across participants' accounts, these conditions appeared not as isolated constraints but as recurring patterns within institutional functioning. The sections that follow examine these patterns as forms of institutional misalignment before considering how they shape informal leadership as compensatory work, its fragility, and its implications for capacity building.

Informal Leadership as Compensatory Work

When considered together, Insight 1 (contribution-oriented enactment) and Insight 3 (blended learning as institutional infrastructure under constraint) suggest that informal faculty leadership in blended learning may be interpreted less as a discretionary leadership activity and more as compensatory work arising in response to infrastructural gaps.

While this study conceptualizes informal leadership as compensatory institutional work, this does not suggest that all informal leadership is compensatory. Rather, informal leadership becomes compensatory under conditions where institutional expectations exceed available structural supports. Generative forms of informal leadership were also present in the data, particularly among participants with prior experience in blended learning, who introduced new practices and modeled alternative approaches. However, across participants, the more consistent pattern involved stabilizing work that addressed structural gaps. The compensatory framing therefore reflects this recurring dynamic.

Participants described how they enacted leadership through visible contributions such as sharing materials, troubleshooting platforms, mentoring colleagues, and stabilizing teaching practices. These actions were rarely framed as formal leadership roles or coordinated work.

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Instead, they functioned as practical responses to gaps in blended learning environments. When systems were incomplete, unreliable, or misaligned with teaching conditions, faculty stepped in to sustain continuity of instruction and student access. The analysis suggests that contribution-oriented enactment functions as a compensatory substitute for institutional capacity.

The compensatory character of informal leadership becomes clearer when these patterns are examined, pointing to a tension between faculty resilience and institutional reliance on that effort. In this study, these are interpreted as expectation-based misalignments between institutional expectations and supporting arrangements. While participants acted with initiative, the repeated need for such responses suggests underlying institutional constraints.

Forms of Misalignment

The following subsections identify recurring forms of institutional misalignment described across participants' accounts.

In this study, misalignment is understood as a persistent gap between expectations for blended learning and the arrangements intended to support that work. Institutional expectations for blended learning were expressed through policy language, continuity requirements, and performance norms that assumed blended learning would be delivered reliably and equitably. Institutional arrangements, including infrastructure, workload models, authority structures, support systems, and recognition mechanisms, did not consistently align with those expectations.

Rather than referring to resource scarcity or implementation difficulty, misalignment is interpreted as situations in which expectations remain stable or expand, while supporting structures do not keep pace or are not consolidated in ways that sustain practice over time.

This interpretation does not imply the absence of institutional planning or initiative. System-level memoranda articulated blended learning as part of a broader academic

transformation and outlined preparations for remote and blended delivery, including infrastructure initiatives, course redesign processes, student support mechanisms, and phased implementation (Bautista, 2020). Subsequent guidance further formalized delivery modes by clarifying modality definitions, specifying proportions of in-person and online components, and requiring structured declarations of learning modes across constituent units (Bautista, 2022).

The analysis that follows draws on participants' accounts to examine how the pace and consolidation of these structural adjustments did not consistently align with the expanding institutional expectations for blended learning over time.

Expectation – Infrastructure Misalignment. Participants described how faculty were expected to deliver blended learning to ensure continuity and access across contexts. This expectation presupposed infrastructure readiness, including stable internet connectivity, updated equipment, reliable digital platforms, and adequate teaching spaces.

In practice, however, participants recounted unstable connectivity, inadequate devices, inconsistent or incomplete systems, and insufficient spaces. They also described how they absorbed the work of stabilizing instruction, provided their own mobile data or Wi-Fi hotspots, purchased or upgraded personal devices, paid for digital subscriptions, and informally adapted physical and virtual spaces to sustain teaching.

This suggests that the misalignment lays not primarily in the absence of infrastructure but in the assumption of infrastructural readiness when operational conditions did not consistently support reliable delivery.

Expectation – Training Misalignment. Participants described how they were expected by the institution to implement blended learning effectively and adapt to evolving technological

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and pedagogical demands. In turn, they assumed that structured preparation and ongoing support would be available to enable faculty to develop and sustain the necessary competencies.

Accounts suggested that training was provided at system, university, and academic unit levels. However, its form, continuity, and relevance varied across units. Some participants described one-time workshops without follow-up, sessions that did not align with discipline-specific needs, or programs that tapered off as emergency conditions subsided. Others relied on peer exchange, informal mentoring, or self-directed learning through online resources to address gaps in preparation.

The analysis suggests that the issue was not the absence of training but rather its inconsistency, declining continuity, and uneven fit with the sustained expectation that faculty would continue to deliver blended learning effectively. As expectations for performance remained stable, responsibility for maintaining and updating competence was often absorbed by faculty rather than being supported through sustained institutional development structures.

Expectation – Funding Misalignment. Participants described expectations that faculty would sustain digital learning environments, including platforms, applications, connectivity, and instructional tools required for blended delivery. Embedded in this expectation was the assumption that the material costs of maintaining these environments would be covered by the institution.

Although funding mechanisms existed in some units, participants described how access to reimbursement was often delayed, limited, and administratively burdensome relative to the ongoing demands of digital delivery. They reported advancing personal funds while waiting for reimbursement, navigating lengthy approval processes, or absorbing costs that exceeded institutional ceilings. Others reported paying for software subscriptions, upgrading internet

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connectivity, or purchasing personal devices to maintain instructional continuity. As a result, sustaining blended learning relied, in part, on privately financed resources.

From my analysis, informal leadership extended beyond pedagogical and coordination work to include material investment, blurring the boundary between professional responsibility and personal subsidy.

Expectation – Workload Misalignment. Faculty in The University System operated within an established and codified tripartite workload structure that formally recognized teaching, research, and service, with service comprising committee participation and governance work. Participants described balancing substantial expectations across these domains.

Blended learning delivery required preparation, coordination, and troubleshooting beyond traditional modes. For informal leaders, expectations extended beyond teaching in a blended modality to include mentoring colleagues, troubleshooting platforms, sharing resources, and stabilizing instructional systems. These leadership-related activities were performed in addition to, rather than within, formal workload allocations.

Participants indicated that time spent on mentoring, technical support, coordination, and informal system stabilization was rarely counted as workload, explicitly allocated, or protected. Some participants noted limited forms of institutional acknowledgment, such as seminar attendance credited as load in some universities. However, these arrangements were uneven across academic units and did not consistently extend to the broader scope of informal leadership labour described in this study. As a result, leadership activities were frequently absorbed into personal time or layered onto existing teaching, research, and service responsibilities.

In interpreting these accounts, I had to distinguish what felt institutionally familiar to me from what participants were clearly naming. Formal workload structures were in place but did

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not expand to accommodate the additional leadership demands associated with blended learning. Informal leadership appeared to function as additional institutional maintenance labor, sustained through personal commitment rather than through structurally integrated workload provision.

Leadership – Authority Misalignment. Faculty were often positioned implicitly or explicitly as local leaders in blended learning practice within their universities. Participants described being approached for guidance, advice, troubleshooting, and coordination, reflecting expectations that they would support colleagues in navigating blended learning practices.

However, these leadership expectations were rarely accompanied by clearly articulated decision pathways or institutionalized advisory roles. Participants described their influence on blended learning as dependent on voluntary uptake, relational trust, and professional credibility, not stabilized institutional processes. Some participants were offered formal roles but declined them, preferring to remain informal advisors. Others described selectively advising colleagues who were receptive, recognizing that influence was not uniformly accepted across hierarchical or disciplinary boundaries.

In interpreting the data, influence was present but remained structurally unsecured. Informal faculty leaders were expected to guide practice, yet the institutional mechanisms through which their recommendations could shape decisions remained undefined. Alignment in this context would not require converting informal leaders into administrators. Rather, it would involve clarifying how advisory influence connects to decision-making structures so that recommendations are formally considered rather than relying solely on individual receptivity.

Innovation – Infrastructure Misalignment. Across accounts, faculty members described blended learning as a system-level pedagogical innovation and institutional priority. Policy language emphasized continuity, modality proportions, and structured implementation

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models. Participant narratives point to the existence of several system-level memoranda that defined blended learning typologies and models, and clarified delivery requirements (Bautista, 2020, 2022). These memoranda positioned blended learning, not as a temporary response, but as part of the institution's longer-term direction in learning design. In this articulation, blended learning appeared as a legitimate and systematized innovation rather than an ad hoc accommodation to disruption.

On the ground, however, participants described conditions that did not consistently align with that positioning. Room shortages, unstable internet connectivity, incomplete or unreliable systems, and shifting modality directives required continuous adjustment. Official directives specified proportions of in-person and online delivery, yet infrastructural and administrative preparation did not always keep pace, as space, scheduling, connectivity, platform coordination, and technical support lagged behind modality requirements. Faculty described redesigning courses, reworking schedules, and troubleshooting logistical friction to make declared modality expectations workable in practice. Some participants noted that they were allowed to continue blended learning, but without coordinated expansion of institutional support. As Participant 05 observed, institutional backing at times felt closer to begrudging tolerance than sustained commitment, particularly as in-person modalities regained emphasis once emergency conditions subsided.

I interpreted the misalignment in this case as lying not in the absence of policy endorsement but in the uneven consolidation of blended-learning innovation as supported infrastructure. Although blended learning was positioned as institutional reform, its enactment frequently depended on local improvisation under constrained institutional conditions. Blended learning operated less as a fully resourced innovation and more as ongoing infrastructural

maintenance sustained through faculty adjustment. My assumption is that informal leadership developed in this space, translating institutional direction into workable practice despite uneven structural alignment.

Sustainability – Recognition Misalignment. The continuity of blended learning implicitly depended on the ongoing efforts of faculty who stabilized platforms, supported colleagues, and absorbed the adjustment work, with an institutional expectation that such labour would continue. Participants' accounts suggest that recognition and stabilization mechanisms did not consistently match this expectation. While system- and university-level awards existed, they were often framed around broader teaching excellence or innovation rather than specifically for sustaining blended learning practice. Participants noted that incentives introduced during the pandemic, such as monetary rewards for course pack development, were later lessened or discontinued, with participation declining as these diminished.

Across accounts, recognition was described less as a matter of prestige and more as basic acknowledgment that the work mattered. One participant suggested that even a simple email of appreciation from leadership would have made a difference. Others pointed to more concrete forms of institutional support, such as laptops, internet allowances, or workload credit, as clearer demonstrations that blended learning efforts were valued in practice rather than merely permitted at the policy level. Participants' accounts further suggested that where material and structural supports were present, implementation appeared easier and more sustainable. Where such supports were absent or uneven, leadership depended largely on personal commitment.

Interpretive Synthesis of Forms of Misalignment. These forms of misalignment are better understood as layered conditions rather than discrete categories. Taken together, they point to a patterned gap between what blended learning requires from informal leaders and what

institutional arrangements support. Operational gaps in infrastructure and uneven support across training, funding, workload, and authority created ongoing strain at the practice level. At the same time, institutional framing of blended learning as a strategic innovation introduced a further tension between expectation and structural readiness. Recognition brought this pattern into view at the level of sustainability, where the ongoing work of maintaining blended learning was not always acknowledged or supported in ways that matched its institutional importance.

Compensatory Informal Leadership Under Conditions of Institutional Misalignment

These recurring expectation-reality gaps help explain why informal faculty leadership assumes a compensatory function. When expectations for blended learning persist without corresponding structural supports, responsibility does not disappear; it is redistributed. In this case, redistribution occurred through informal faculty labour that absorbed infrastructural strain and sustained instruction.

While existing blended learning research identifies institutional supports as critical and frames their absence as a barrier to adoption (Sareen & Mandal, 2024), it pays less attention to how persistent misalignment redistributes responsibility within institutions. Where such misalignment endures, institutional operations persist because faculty compensate for structural gaps, often informally and at personal cost.

This compensatory function was especially evident where blended learning was treated as infrastructure rather than innovation. Participants did not treat blended learning as an optional enhancement that could be set aside when conditions were difficult. Instead, their accounts suggest that it was embedded in everyday teaching as a necessary means of managing access, continuity, and equity under constraint. Informal leadership developed at the points where this infrastructure strained or failed, requiring faculty to absorb additional work to keep these systems

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functioning. Leadership, in this sense, was enacted through maintenance, repair, and adaptation, not strategic direction. This aligns with sector-level analyses of Philippine higher education that document persistent limitations in digital infrastructure and faculty capacity, highlighting the challenges of sustaining digitally enhanced teaching across institutions (World Bank, 2022).

My interpretation is that compensatory informal leadership operates as a patterned organizational response to enduring misalignment, allowing institutional functioning to continue even as the structural conditions that generate strain remain intact.

This interpretation may be further understood through Lewin's (1947, 1951) three-stage model of change, which conceptualizes change as a process unfolding over time through phases of unfreezing, moving, and refreezing. The rapid expansion of blended learning during and after the pandemic can be read as a form of unfreezing, where established modes of instruction were disrupted and institutional expectations shifted. The conditions described in this study suggest that The University System remains in an extended moving phase, where new practices are enacted, adjusted, and stabilized unevenly across contexts. From this perspective, the forms of misalignment identified in this study may be understood not only as structural constraints, but also as characteristic of a system in transition, where expectations for blended learning have advanced more quickly than the consolidation of supporting structures. This reading is consistent with recent applications of Lewin's force field perspective in public sector digital transformation, which highlight how change processes are shaped by interacting organizational, technological, managerial, and institutional forces (Lemmettylä & Kinnunen, 2025).

Within this phase, informal faculty leadership functions as a compensatory response to these conditions, and also as part of how instructional practice is sustained while the system remains in motion. Faculty contributions enable continuity, adaptation, and local stabilization,

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even as broader institutional arrangements remain uneven. However, Lewin's model also suggests that change requires eventual refreezing, where new practices become structurally supported and stabilized. Without this consolidation, blended learning risks being sustained through compensatory faculty labour rather than through aligned institutional support, leaving leadership fragile and dependent on ongoing individual effort.

Extending this interpretation through Lewin's (1947, 1951) force field perspective, institutional expectations for blended learning can be read as driving forces, while infrastructural instability, workload constraints, authority gaps, and recognition limits can be read as restraining forces. Participants' accounts suggest that informal faculty leadership develops within this tension as a compensatory effort that temporarily offsets imbalance. Rather than resolving structural misalignment, informal leadership supplies additional energy to maintain temporary equilibrium. Because the restraining forces remain intact, stability depends on sustained personal effort.

Participants' accounts suggest that this compensatory work remained largely unrecognized and not structurally secured in The University System, even though it was necessary for blended learning to function in practice. Informal leadership became normalized within everyday academic labour, standing in for institutional supports that remained absent or insufficient.

Interpreting informal leadership as compensatory work shifts attention away from individual capacity toward the conditions that make such compensation necessary. This framing sets the stage for the subsequent discussion of legitimacy, fragility, and the limits of individual capacity in sustaining informal leadership over time.

Legitimacy, Fragility, and the Limits of Individual Capacity

My interpretation of the interview data indicates that informal faculty leadership in blended learning was shaped not only by what faculty were able to do, but by how their contributions were recognized and sustained within institutional contexts. As shown in Chapter 4, informal leadership was widely enacted through contribution-oriented practice. However, its influence and durability depended on legitimacy and consent. Because recognition was contingent rather than secured, informal leadership remained fragile.

The concept of legitimacy as a central condition mediating whether informal leadership practices translate into influence is supported by my analysis of participants' accounts. I interpret legitimacy as referring to the extent to which colleagues recognize and accept one's contributions as credible and worth following. Participants described how influence depended on colleagues' recognition of competence, trust built over time, and proximity to shared practice. Even when faculty consistently enacted leadership through mentoring, troubleshooting, and modeling workable approaches, influence varied across contexts and relationships. Participants described legitimacy not as a stable attribute of individuals, but as negotiated and situational, shaped by local norms, relational histories, and institutional arrangements.

Relational leadership scholarship helps illuminate this pattern. Leadership is understood not as a property of individuals but as a social process constituted in interaction (Uhl-Bien, 2006). Foundational work in distributed leadership and leadership-as-practice similarly conceptualizes influence as developing through interaction and the uptake of contributions rather than through formal authority alone (Gronn, 2002; Raelin, 2011, 2023; Spillane, 2006). From this perspective, leadership becomes visible when others recognize and act upon contributions. My interpretation of the interview data aligns with this view. Participants described informal

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faculty leadership in blended learning as enacted through everyday contributions, yet its influence depended on relational uptake.

Participants' accounts suggest that faculty were not only negotiating relational legitimacy. They were also responding to structural gaps in infrastructure, workload allocation, authority boundaries, and recognition systems. Informal leadership, therefore, developed under dual constraints: relational negotiation and structural insufficiency. My interpretation is that faculty worked to secure recognition while compensating for the structural conditions that made such leadership necessary. They were leading within unstable institutional arrangements.

At the same time, my interpretation of the data extends this scholarship by demonstrating how relational leadership operates under conditions of institutional misalignment. The analysis suggests that legitimacy did not guarantee the durability of influence. Even when faculty were recognized as competent and trustworthy, their leadership remained vulnerable where institutional arrangements were uneven or incomplete. Recognition enabled influence, but it did not secure its continuation. In the absence of workload protections, authority pathways, or recognition mechanisms, sustaining leadership required continued personal effort. Informal leadership influence remains unstable because it depends on conditions that are not structurally secured. I refer to this instability as *fragility*.

In my interpretation, fragility was not a matter of individual limitation. Participants described having substantial skill, commitment, and initiative. What remained unstable were the institutional conditions necessary to sustain their leadership work. Participants' accounts indicate that leadership was widely enacted but not structurally secured. Because the participants' informal leadership depended on both negotiated relationships and uneven institutional

arrangements, its durability required continued recognition and personal effort. Where relational dynamics shifted or structural gaps persisted, influence could quickly diminish.

These dynamics reframe how capacity-building should be understood. Some participants clearly possessed the skills, experience, and commitment necessary to enact leadership. Yet these did not consistently translate into durable leadership influence. My interpretations of the interview data suggest that leadership challenges in blended learning contexts are not primarily rooted in deficits of individual capacity, but in the absence of institutional conditions that stabilize and legitimate leadership work. When misalignment between expectations and institutional support persists, instability is produced at the structural rather than the individual level. In such conditions, capacity-building initiatives that focus on individual skill development risk leaving the underlying sources of fragility intact.

Viewing informal leadership as legitimacy-dependent and structurally constrained shifts the focus of capacity building. The issue is not how faculty can be better trained to lead, but how institutional arrangements determine whose leadership is recognized, how influence is sustained, and whether leadership practices can endure over time. Capacity-building efforts are unlikely to be sustained where legitimacy remains contingent and institutional misalignment persists.

Rethinking Capacity Building Under Conditions of Misalignment

Building on the analysis of supporting and hindering conditions, I consider how these insights inform capacity building for informal faculty leaders, in response to Research Question 3. If leadership remains structurally constrained, capacity building cannot be reduced to skill development alone. It must be reconsidered in relation to institutional conditions. Drawing on development and organizational change scholarship, this section clarifies how capacity has been

conceptualized and considers it through the lens of institutional misalignment. It then advances a multi-level account of capacity building at the individual, relational, and structural levels.

Conceptualizing Capacity: From Development Policy to Organizational Change

To clarify what capacity building entails under conditions of institutional misalignment, this section revisits how capacity has been conceptualized in development and organizational change literature.

Zamfir (2017) situates capacity-building within development policy and institutional reform, where debates have led to a preference for the term capacity development to emphasize processes of strengthening and adaptation.

Within this shift, the OECD framework provides widely cited definitions. *Capacity* is defined as “the ability of people, organizations, and society as a whole to manage their affairs successfully,” whereas *capacity development* refers to “the process whereby people, organizations and society as a whole unleash, strengthen, create, adapt, and maintain capacity over time” (OECD, 2006).

The OECD’s definition of capacity, described as “deliberately simple” (OECD, 2006, p. 12), is useful for analyzing conditions that enable and hinder informal leadership in this study. It does not prescribe specific outcomes or normative standards of success, but remains linked to performance, as it shapes whether systems can reliably deliver intended goods, services, and policies. In this sense, capacity functions as the underlying condition that enables institutional performance.

While development literature often prefers the term, capacity development, to emphasize endogenous processes of change, this study retains the term, capacity building, to remain consistent with the research question and the higher education literature in which it is situated.

Beyond understanding capacity as conceptualized by development organizations, it may also be viewed through the lens of organizational change. Conner (2006) defines capacity as the extent to which individuals and organizations can absorb change, describing it in terms of finite “change assimilation points” that are depleted as new demands accumulate. In this view, capacity reflects the remaining bandwidth available to accommodate disruption without exceeding absorptive limits. When the pace or cumulative volume of change surpasses those limits, dysfunction, stress, and resistance may develop.

In this formulation, capacity-building involves managing the pace and cumulative impact of change so that demands remain manageable. At the organizational level, this requires attention to the number and overlap of concurrent change initiatives. Capacity is finite at any given moment, but resilience can expand available assimilation points over time, strengthening the ability to absorb future change (Conner, 2006).

Operationalizing Capacity Development in Higher Education

Zamfir (2017) emphasizes that capacity must be defined in relation to clearly articulated purposes and grounded in context, including institutional incentives, organizational dynamics, and the broader enabling environment. In this view, capacity development supports locally owned sources of change and integrates skills development with organizational reform across multiple levels.

Applying this to informal leadership in blended learning points to the need for similar specificity. Capacity development cannot remain an abstract commitment to improvement, but must be tied to institutional purposes and grounded in the conditions that shape how blended learning is enacted. Consistent with this emphasis on locally owned change, attention turns to internal actors whose work already sustains institutional functioning.

My analysis extends this logic. In this context, capacity development does not necessarily require new structures. Instead, it involves recognizing, coordinating, and strengthening practices already operating informally within institutional constraints. This interpretation shifts the focus from externally designed reform to aligning and legitimizing work that is already enacted, often without formal designation or support.

Reorienting Capacity Building Under Conditions of Misalignment

My interpretive analysis of the interview data suggests that faculty already possessed leadership capability under conditions of institutional misalignment. The issue is not whether faculty possessed leadership capacity, but how capacity-building efforts were reoriented when structural instability shaped the sustainability of leadership work. If misalignment generated the need for compensatory leadership while simultaneously constraining it, capacity building could not be reduced to training alone. It may have needed to address the relational and institutional conditions that shaped whether leadership practices could be stabilized, recognized, and sustained.

When informal leadership functions as ongoing compensation for institutional gaps and becomes embedded in everyday practice, it may need to address the institutional arrangements that make such compensatory work necessary. In this context, capacity building becomes a matter of aligning expectations with structural support rather than enhancing individual capability alone.

This interpretation also resonates with distributed leadership scholarship that conceptualizes capacity as collective rather than solely individual. Harris (2014) argues that capacity exists at individual, collective, and organizational levels, and that improvement depends not only on individual competence but also on shared practice and collaboration. She also

emphasizes that effective professional learning involves sustained collaboration rather than routine upskilling. Considered in relation to the present study, this perspective reinforces the view that capacity building in blended learning cannot be confined solely to developing individual faculty members' skills. At the same time, the interpretations developed here extend this discussion by showing that collective capacity is shaped by the institutional conditions under which faculty work.

A Multi-Level Analysis of Capacity Building

In the preceding sections, I clarified my interpretation of how capacity building has been conceptualized and how it may need to be reoriented under conditions of misalignment. I now interpret the participant interview data across three interrelated levels: individual, relational, and structural. In this multi-level analysis, I show why capacity building cannot be confined solely to skill development; institutional alignment is central to sustaining informal leadership over time.

Individual Capacity. At the individual level, capacity is necessary but insufficient for sustaining informal faculty leadership in blended learning. Participants demonstrated this capacity through problem-solving, sharing workable approaches, and supporting colleagues in navigating the demands of blended learning. These practices reflected experience, competence, and commitment, indicating that faculty did not lack the skills typically targeted by capacity-building initiatives. However, as shown in Chapter 4, the persistence and influence of these practices were constrained by legitimacy dynamics and institutional arrangements rather than individual capability alone.

This distinction points to a structural limitation of capacity-building approaches under conditions of institutional misalignment. Under these conditions, additional training does not resolve the constraints that render leadership fragile. Instead, it risks intensifying compensatory

labour by adding expectations without addressing the institutional conditions that make this labour necessary. Capacity building in blended learning contexts may therefore need to extend beyond individual competence to the relational and structural factors that shape whether leadership practices are recognized and sustained. This leads to a second level of analysis: the relational conditions through which leadership is legitimized and taken up.

Relational Legitimacy. If individual capacity alone is insufficient, leadership capacity may need to be understood as enacted through relational processes rather than residing solely in individuals. Informal faculty leadership in blended learning operates through interaction rather than position.

Participant narratives described how leadership influence depended less on formal role or individual expertise than on whether contributions were recognized and taken up by others. Legitimacy developed through ongoing interaction, trust, and proximity to shared practice. Leadership capacity was therefore realized *within* relationships rather than existing independently of individuals. Thus, capacity building may need to attend to the conditions under which faculty recognize, respond to, and enact one another's contributions in everyday practice.

Viewing capacity building as relational may explain why leadership influence remained uneven across contexts. Because influence relied on voluntary uptake and consent, leadership capacity was not activated uniformly, even when individuals possessed comparable expertise. Departmental norms, professional relationships, and local expectations shaped whose contributions were legitimized and whose were not. Strengthening leadership capacity therefore requires strengthening the relational conditions through which legitimacy is constructed and sustained.

Nonetheless, relational recognition alone cannot secure the durability of leadership if institutional arrangements remain misaligned. Even where legitimacy is present, informal leadership remains vulnerable when institutional arrangements are uneven or incomplete.

Structural Alignment. Even where informal leadership is relationally legitimized, it remains vulnerable under conditions of institutional misalignment. Capacity building in blended learning contexts may need to be understood as structural alignment rather than solely as investment in individuals or relationships. Across participants' accounts, leadership was enacted in response to persistent gaps between expectations and institutional structures. These gaps shaped not only whether leadership was needed, but also whether it could be sustained. In this sense, misalignment functions as a capacity constraint, limiting the durability and scalability of leadership beyond individual effort.

Viewed through a structural lens, capacity building points to how institutional arrangements shape the durability of leadership practices. Across participants' accounts, when faculty assume leadership responsibilities without corresponding authority, time, or recognition, leadership remains informal and compensatory. Relational legitimacy may enable influence, but misaligned institutional structures limit the durability of that influence. Capacity building may therefore need to address how responsibility is allocated, how leadership work is legitimized, and how support is coordinated across units. Without structural alignment, efforts to strengthen leadership capacity risk reinforcing dependence on individual goodwill rather than changing the institutional conditions that generate compensatory leadership.

Toward Institutional Alignment

Interpreting capacity building through individual, relational, and structural lenses reframes informal leadership development in blended learning. Where informal leadership

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compensates for institutional gaps, strengthening individual competence without structural alignment will not secure durable leadership.

A first implication concerns *institutional recognition*. Informal leadership often takes the form of everyday contributions that sustain blended learning practice, yet these contributions remain largely invisible within formal workload, evaluation, and reward systems. Without institutional recognition, leadership remains fragile regardless of individual capability. Therefore, there is a need for capacity building to include institutional mechanisms of recognition that align expectations with actual labour.

A second implication concerns the *redistribution of responsibility*. When leadership persists because faculty compensate for gaps between expectations and support, capacity-building initiatives focused solely on individual development risk reinforcing dependence on personal goodwill. Alignment comes with the need to clarify how authority, workload, coordination, and support are allocated so that leadership responsibilities are not absorbed informally without corresponding institutional backing.

A third implication concerns *coordination across institutional levels*. Because leadership capacity is realized relationally and constrained structurally, there is a need for sustainable capacity building to achieve alignment across departments, units, and central administration. Without such coordination, compensatory leadership will continue to recur under institutional strain.

Under conditions of enduring misalignment, there is a need to understand capacity building as institutional alignment work. The task is to stabilize and support leadership that is already being enacted. Reducing reliance on compensatory labour requires addressing the institutional conditions that generate it. In this sense, compensatory leadership may function as a

transitional form of stabilization when institutional conditions begin to adjust, but becomes more fragile when such efforts are repeatedly relied upon without corresponding structural support

Across participants' accounts, these institutional conditions were not diffuse but clustered around several recurring domains of institutional organization. Participants repeatedly referred to issues related to workload models, infrastructure, authority structures, and recognition systems. These domains represent areas where expectations for blended learning and the institutional arrangements supporting that work did not consistently align. Viewed through a systems perspective, they may be understood as potential institutional alignment levers, locations where adjustments in institutional arrangements may influence how blended learning leadership is enacted and sustained. Taken together, these conditions point to the need for a way of understanding how institutional alignment and everyday practice interact in sustaining blended learning.

Bibingka as an Interpretive Lens for Institutional Alignment. Two participants independently invoked the Filipino metaphor of *bibingka*, a rice cake traditionally cooked using heat from above and below. In their accounts, the cooking method served as an analogy for a process in which institutional direction and ground-level practice needed to work together for blended learning to function. Blended learning initiatives, they suggested, become more sustainable when institutional direction, resources, and recognition align with the realities of faculty work.

This metaphor provides a way of carrying forward the interpretation of alignment and misalignment identified in Chapter 4. It also resonates with Philippine scholarship, where it has been used to describe the interaction between state-level actors and grassroots initiatives (Borras, 1998). While the context differs, the underlying idea of coordinated effort across levels reflects

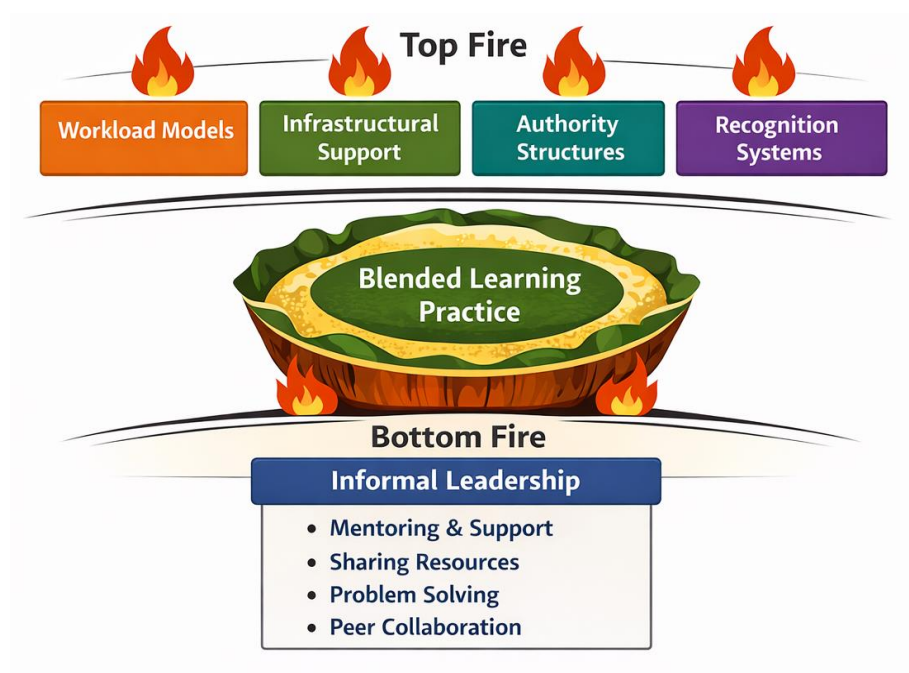
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how participants described the conditions under which their contributions were taken up and sustained.

In this study, the metaphor helps make visible how informal faculty leadership operates within a space shaped by both institutional arrangements and local practice (Figure 5). The “top fire” represents institutional alignment across key organizational systems, including workload models, infrastructure, authority structures, and recognition mechanisms. The “bottom fire” represents contribution-oriented practices through which faculty support colleagues and stabilize blended learning within their departments.

Figure 5

Bibingka as an Interpretive Lens for Institutional Alignment in Blended Learning



Note. The Bibingka heuristic illustrates the relationship between institutional support (“top fire”) and informal faculty leadership (“bottom fire”) in sustaining blended learning practice. Blended learning becomes more sustainable when institutional systems and everyday faculty practices reinforce one another.

When these two sources of support reinforce one another, blended learning practice becomes more stable and sustainable. When alignment is incomplete, informal faculty leadership compensates for structural gaps through ongoing adjustment and personal effort. In this sense, the *bibingka* metaphor captures how institutional alignment and informal leadership operate as interdependent conditions shaping the continuity of blended learning practice.

Practical Implications for Institutional Capacity-Building Design

If informal faculty leadership persists under conditions of institutional misalignment, there is a need for capacity-building initiatives to address structural clarity, relational legitimacy, and cross-level coordination. Strengthening capacity requires aligning expectations with institutional arrangements so that compensatory labour is not the primary mechanism sustaining blended learning. In this section, I outline practical implications for institutional capacity building based on my interpretation of the study data.

At the *structural level*, alignment does not require converting informal leaders into formal administrators. It involves clarifying decision boundaries and advisory pathways. Departments may establish written guidelines specifying when blended learning advisors are formally consulted during curriculum revisions or platform transitions. Recurring infrastructure concerns may be linked to a structured feedback loop between faculty and information technology services. Standing blended learning working groups may be institutionalized to reduce reliance on ad hoc coordination.

At the *relational level*, institutions may formally acknowledge peer advisory roles without imposing hierarchical authority. This may include identifying faculty as blended learning mentors, recognizing advisory contributions in annual review narratives, and ensuring that

mentoring and coordination activities are documented in service reports. Such measures strengthen legitimacy without requiring positional power.

At the *institutional support* level, alignment may involve protecting time for advisory work, allocating modest but stable funding for digital experimentation, and designating administrative liaisons to support faculty who routinely coordinate blended learning practice. These arrangements do not bureaucratize informal leadership, but stabilize it by reducing dependence on personal goodwill and repeated negotiation.

Through such measures, capacity building shifts to aligning institutional structures with leadership already enacted in practice. Sustainable capacity building therefore requires attention to how institutional expectations, relational legitimacy, and structural support interact over time.

Positioning the Study's Broader Contribution

These interpretations extend distributed leadership theory by showing that leadership practice is not only distributed across actors but also shaped by uneven institutional conditions that constrain and enable participation. This interpretation is shaped by my position within the same institutional context, which gave me familiarity with how blended learning is implemented. This proximity also informed how I interpreted participants' accounts of institutional constraints. In this context, informal leadership is not simply a function of distributed expertise, but is a situated response to structural misalignment.

This study does not aim to support empirical replication in the sense of producing identical findings across contexts. As I worked through the analysis, it became clear that the interpretations developed here are closely tied to context, as well as to my own positioning and judgement in reading the data. In this sense, the value of the study lies in how the accounts are interpreted and situated, rather than in whether the same patterns would appear elsewhere. As

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Geertz (1973/2000) notes, interpretive inquiry is concerned with the explication of meaning rather than the production of law-like generalizations. The findings are therefore offered as an account that can be read and considered in relation to other institutional settings. This is consistent with Yin's (2018) concept of analytic generalization, where case study findings contribute to the development and refinement of theoretical propositions rather than to statistical inference. The aim is to offer an interpretation that may inform understanding of informal faculty leadership under conditions of institutional misalignment in other contexts.

Under conditions of enduring institutional misalignment, informal faculty leadership assumes a compensatory function within The University System. This compensation was not confined to moments of disruption but became embedded in everyday institutional practice. Informal leadership frequently substituted for institutional supports that were absent or insufficient.

By reframing informal faculty leadership as compensatory rather than discretionary, this study extends scholarship on informal leadership and blended learning in higher education. Rather than treating leadership as the outcome of enabling conditions or individual initiative alone, informal faculty leadership can be understood as compensatory institutional work under conditions of misalignment. This perspective moves beyond binary accounts of supports and barriers by showing how informal leadership becomes normalized within institutional functioning. In this sense, informal leadership is not only emergent influence, but also work that sustains institutional activity under uneven conditions. The term, compensatory, is analytically appropriate in this context because it captures the function of informal leadership in filling structural gaps, rather than only describing how leadership appears in practice.

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A central contribution of this study lies in its reinterpretation of capacity building. The analysis shows that faculty enact leadership capability through everyday practice. The sustainability and influence of this leadership are constrained by the relational and structural conditions within which it operates. Framing misalignment as a gap between expectations and institutional support shifts attention away from individual deficit models toward institutional alignment as the central analytic concern.

The theoretical contribution of this study lies in understanding informal faculty leadership in blended learning as a patterned compensatory response to enduring institutional misalignment. Viewed through Lewin's (1947, 1951) force field perspective, misalignment can be understood as a persistent structural condition that shapes how leadership is enacted and sustained, rather than as a temporary imbalance to be resolved. Lewin's framework is particularly useful here because it provides a way to interpret how institutional expectations and structural constraints coexist, allowing informal leadership to be understood as a stabilizing response within conditions of ongoing tension.

In this view, misalignment is not simply a temporary implementation gap. It functions as a structural capacity constraint that helps explain how informal leadership contributes to the stability of institutional systems. Informal leadership develops and persists where institutional expectations exceed available structural support. In this context, it generates the need for informal leadership while constraining its sustainability.

As a structural capacity constraint, misalignment redirects analytic attention from individual development to institutional alignment. This perspective offers one way of understanding how higher education institutions may sustain blended learning not only through formal structures, but also through informal labour that absorbs systemic strain.

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These interpretations highlight the limits of individual effort under structural constraint, pointing to the need to examine how alignment between expectations and institutional support can be strengthened. They offer an interpretive lens for future research and institutional practice on how alignment might be strengthened without intensifying the burden on individual faculty members.

Summary

Ultimately, this study suggests that informal faculty leadership in blended learning does not arise solely from individual initiative or enabling conditions, but from the ongoing negotiation of institutional misalignment. Misalignment functions as a structural capacity constraint that generates the need for informal leadership while limiting its sustainability. Informal leadership operates as a patterned stabilizing response within higher education systems. Capacity building, in this context, involves aligning institutional arrangements with leadership already being enacted in everyday practice. Sustainable support for blended learning therefore requires attention to legitimacy, workload, coordination, and structural support. This perspective clarifies how institutions sustain innovation through informal labour while exposing the limits of relying on such labour without structural alignment. These interpretations suggest that strengthening blended learning leadership depends on how institutional expectations and structural supports are aligned. The following chapter therefore considers the broader implications of these findings and outlines conceptual models that illustrate how institutional alignment might support the sustainability of informal faculty leadership.

Chapter 6. Conclusion and Applied Implications

In this chapter, I consolidate my interpretations and situate them within the broader conceptual and practical aims of the study. The chapter revisits the study's purpose and research questions, summarizes the key insights, and articulates the theoretical and practical contributions. It concludes with a discussion of limitations and directions for future research.

Restatement of Purpose and Research Questions

I examined informal faculty leadership in blended learning within a Philippine public university system, anonymized as The University System. The study was designed as an exploratory qualitative instrumental case study exploring the conditions that support or hinder informal faculty leadership.

Existing blended learning initiatives in the Philippine context tend to focus on formal academic leaders or on developing individual faculty competencies. Informal faculty leaders, experienced practitioners who influence practice without formal authority, remain largely outside the scope of institutional programs. I addressed this omission by examining the enabling and constraining conditions that shaped informal leadership and by drawing implications for capacity-building efforts within the system. These interpretations provide the basis for considering how informal faculty leadership and institutional conditions may be understood and addressed in relation to capacity-building.

The overarching research question was: How can knowledge of the conditions that support or hinder informal faculty leadership in blended learning in Philippine higher education institutions inform the development of a capacity-building program for these leaders?

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The specific research questions were:

RQ 1. What conditions supported informal faculty leadership in blended learning within a Philippine university system?

RQ 2. What conditions hindered informal faculty leadership in blended learning within a Philippine university system?

RQ 3. How can knowledge of the conditions that support or hinder informal faculty leadership in blended learning inform the development of a capacity-building program for informal leaders within a Philippine university system?

Although the research questions were initially framed in relation to program development, the insights indicate that the conditions shaping informal leadership extend beyond individual support to institutional alignment, with implications for how capacity-building is understood and enacted.

Summary of Key Insights

My interpretations from the participant interviews were organized around four interrelated insights that clarify how informal faculty leadership in blended learning was enacted, legitimized, constrained, and sustained within The University System. Collectively, these insights suggest that informal leadership functions as a patterned response to enduring institutional misalignment, developing through everyday contributions while remaining relationally contingent and structurally fragile.

Insight 1: Informal Leadership as Contribution-Oriented Practice

Informal faculty leadership was enacted through contribution-oriented practice rather than positional authority. Leadership developed through practical actions that made blended learning workable in everyday practice, including troubleshooting instructional challenges,

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sharing adaptable materials, modeling effective approaches, and supporting colleagues in moments of uncertainty. These contributions were embedded within routine academic work and were rarely claimed as a leadership identity.

Although often framed as collegial assistance, these actions carried institutional weight. Sustained engagement functioned as a compensatory response to gaps in infrastructure, coordination, and instructional support. Informal leadership stabilized blended learning under uneven institutional conditions, with influence developing through visible contribution rather than formal designation.

Insight 2: Legitimacy and Consent in Informal Influence

While informal leadership was enacted through contribution-oriented practice, contribution alone did not guarantee influence. Whether informal leadership shaped others' practices depended on recognition and uptake. Influence operated through legitimacy and consent, not directive authority.

Participants described legitimacy as developing through demonstrated competence, trust built over time, and sustained engagement in shared practice. Even when faculty contributed consistently, their influence varied across local relationships, norms, and hierarchies. Informal leadership therefore remained contingent on how contributions were taken up within specific contexts, rather than being secured through a formal role or positional authority.

Insight 3: Blended Learning as Institutional Infrastructure Under Constraint

Participants described blended learning not simply as a pedagogical innovation, but as institutional infrastructure that needed to function reliably when circumstances required it. Although academic freedom shaped modality choices and blended learning was not uniformly adopted across contexts, it became especially important during periods of disruption such as

calamities, health emergencies, or campus closures. In these moments, it enabled teaching and learning to proceed when in-person delivery was interrupted.

At the same time, even where blended learning remained optional, it operated under persistent constraint. Participants described unstable connectivity, uneven access to equipment and support, shifting expectations, administrative burden, and workload pressures that shaped what blended learning could realistically accomplish. When systems faltered, faculty absorbed the additional work required to maintain instructional continuity. Blended learning therefore operated as infrastructure requiring ongoing maintenance rather than episodic implementation. These conditions formed the context within which informal leadership became both necessary and constrained.

Insight 4: Informal Leadership as a Response to Institutional Misalignment

Participants described a recurring gap between institutional expectations for blended learning and the structures available to support that work. Faculty were expected to sustain instructional continuity, deliver quality teaching, coordinate effectively within their units, and implement modality requirements. However, workload allocation, infrastructure, authority, and recognition mechanisms did not consistently adjust to support these demands.

Within this gap, informal faculty leadership took shape. Faculty stepped in to coordinate colleagues, advise on course design, troubleshoot systems, and stabilize local practices. These actions were rarely formally designated and were undertaken without corresponding structural support. Informal leadership, therefore, developed as a practical response to the misalignment between institutional expectations and operational conditions.

Although these practices enabled blended learning to function, they depended heavily on individual commitment and ongoing negotiation. Informal leadership persisted because

expectations endured. However, its sustainability remained uncertain in the absence of stronger institutional alignment.

These insights point to a recurring condition in which blended learning is sustained through informal faculty leadership when institutional expectations outpace available support. What appears as contribution, legitimacy, infrastructural constraint, and structural gaps reflects different expressions of the same underlying alignment problem rather than separate issues. Informal leadership endures because expectations continue even when institutional arrangements remain uneven, leaving practice dependent on compensatory effort. This raises questions about how such work can be sustained without placing continued strain on individual faculty members.

Theoretical Contributions

This study advances a conceptualization of informal faculty leadership in blended learning as compensatory institutional work under conditions of misalignment.

Informal Leadership as Compensatory Institutional Work

First, informal faculty leadership is understood as compensatory work enacted within structural gaps. Informal leadership did not develop as a discretionary initiative or innovation. It took shape where institutional expectations for blended learning exceeded available structural support. Faculty assumed coordination, troubleshooting, mentoring, and stabilization functions not because these roles were formally assigned, but because institutional demands required them. This suggests that accounts of informal leadership that emphasize emergence or individual initiative may overlook how leadership becomes necessary under conditions of structural misalignment.

This framing shifts analytic attention from individual leadership capacity to the institutional conditions that make compensatory effort necessary and sustain it over time.

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Informal leadership is therefore understood not only as relational influence, but as work enacted in response to misalignment between institutional expectations and structural support. This requires attention not only to leadership practice, but also to the conditions that shape whether such practice can be sustained.

Institutional Misalignment as a Structural Condition

Second, institutional misalignment is understood as a structural condition shaping leadership enactment. Here, structural refers to the institutional arrangements that organize academic work, including workload allocation, authority distribution, infrastructure provision, and recognition systems. According to study participants, expectations for blended learning continuity, coordination, and performance remained stable across contexts, yet these arrangements did not consistently adjust accordingly. This suggests that explanations of leadership that treat structure as background context may overlook how institutional conditions actively shape the emergence and persistence of informal leadership.

By identifying this gap, I advance a structural explanation for the emergence and persistence of informal leadership. Informal leadership does not simply coexist with formal structures; it develops in the space created when institutional expectations for blended learning diverge from the supports available to enact them. Misalignment was not a secondary condition in this study; it shaped the institutional context within which informal leadership developed and persisted.

Reframing Capacity-Building as Alignment Work

Third, my insights reframe capacity-building for informal faculty leaders in blended learning contexts. Rather than locating capacity solely at the level of individual skill development, capacity-building must also address structural alignment. When expectations for

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blended learning remain stable but institutional supports are uneven, leadership work becomes compensatory.

My interpretation of leadership is that it requires not only competent individuals, but institutional arrangements that align workload, infrastructure, authority, and recognition with institutional expectations. Capacity-building is therefore conceptualized as alignment work rather than solely professional development. This reframing shifts attention from developing individual competence to examining how institutional arrangements shape whether leadership can be enacted and sustained.

Practical Implications

The practical implications of this study derive from its structural interpretation of informal faculty leadership. If informal leadership in blended learning develops under conditions of institutional misalignment, sustainability cannot be secured through individual development alone. Institutional alignment therefore becomes central to capacity-building efforts.

Institutional Alignment

Institutions may examine how expectations for blended learning align with workload models, authority structures, infrastructure provision, and recognition systems. Where blended learning is expected to function reliably, institutional arrangements may be reviewed to ensure that coordination, troubleshooting, and mentoring responsibilities are not absorbed informally without institutional support or acknowledgment.

The interpretive relationship between institutional misalignment, informal faculty leadership, and potential institutional responses is illustrated in Figure 6.

Figure 6

Conceptual Process Linking Institutional Misalignment, Compensatory Informal Leadership, and Institutional Alignment

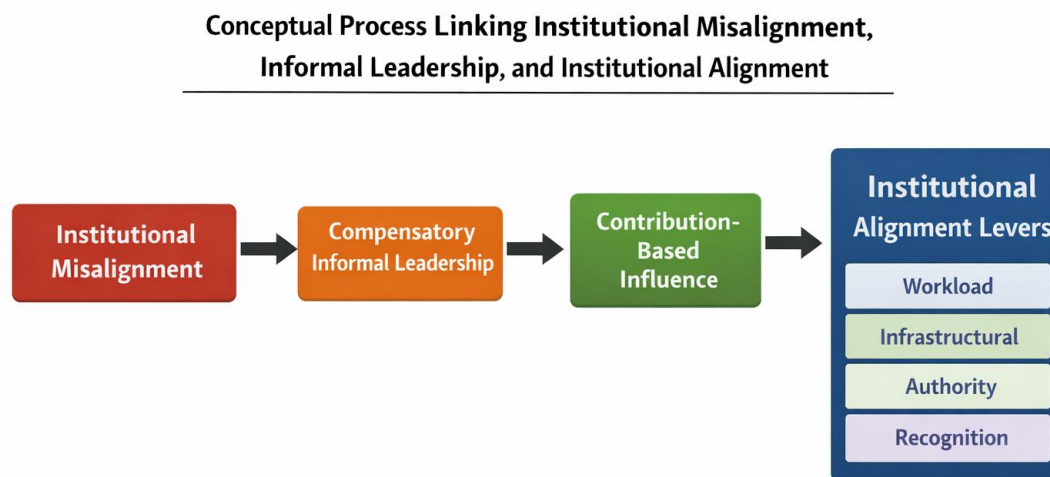


Figure 6 summarizes the interpretive process identified in this study. Participants described situations in which expectations for blended learning were not consistently supported by institutional arrangements. Under these conditions, faculty frequently stepped in informally to stabilize practice by assisting colleagues, sharing instructional resources, and troubleshooting teaching challenges. Influence developed through contribution-based practice rather than formal authority. The analysis suggests that institutional responses aimed at strengthening blended learning capacity may focus on aligning key systems, particularly workload allocation, infrastructure support, authority structures, and recognition mechanisms, so that the work currently sustained through informal leadership does not depend solely on compensatory effort.

This does not require formalizing informal leadership roles. It requires ensuring that expectations for continuity and performance are matched by stable systems and clearly defined

responsibilities. Alignment, in this sense, refers to coherence between institutional expectations and the supports necessary to enact them.

Recognition and Sustainability

Institutions must address how informal leadership labour is recognized and sustained. The findings suggest that informal leaders often assume additional responsibilities without adjustments to workload or corresponding structural support. While these contributions reflect professional commitment, sustained reliance on compensatory effort risks straining and unevenly distributing labour.

Informal leadership does not need to be converted into formal roles to be sustained. Recognition may take the form of workload adjustments, clearer delineation of responsibilities, or institutional acknowledgment, while preserving flexibility. The aim is to reduce reliance on voluntary effort.

Capacity-Building Within Structural Contexts

Capacity-building efforts are most effective when situated within broader institutional alignment. Professional development remains important. However, when workload, infrastructure, authority, and recognition remain unchanged, expanding training alone may increase responsibility for faculty already enacting informal leadership without corresponding structural support. Institutional conditions shape not only leadership practice but also determine whether capacity-building efforts can be effective.

A Staged Alignment Approach to Capacity Building

The interpretations developed in this study suggest that institutional responses to informal faculty leadership in blended learning may benefit from a staged approach. Participants' accounts indicated that informal leadership developed where expectations for blended learning were not fully matched by institutional arrangements. These tensions appeared most clearly in

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four domains: workload allocation, infrastructure, authority structures, and recognition systems. When these elements were not aligned with institutional expectations, faculty responded informally by helping colleagues, sharing resources, and stabilizing teaching practice.

Addressing these conditions may require capacity-building efforts that extend beyond individual training to examine how institutional systems support or constrain blended learning. One possible institutional response is a staged pilot initiative that recognizes existing informal leadership and strengthens the conditions that support it.

Stage 1: Identifying Informal Leadership Practices

The first stage involves identifying faculty who function as informal reference points within their teaching environments. Participants described colleagues who regularly shared blended learning resources, demonstrated effective practices, and assisted others in troubleshooting instructional challenges. Institutions could begin by mapping these practices through peer nomination, departmental referrals, or participation in practice-sharing activities. The goal of this stage is not to formalize leadership roles; it is to recognize the contribution-oriented practices sustaining blended learning within departments.

Stage 2: Stabilizing Enabling Conditions

The second stage focuses on strengthening the conditions that participants described as constraining their work. These conditions involved unreliable infrastructure, uneven access to instructional support, and workload expectations that did not account for mentoring and coordination activities. Institutions may review whether responsibilities associated with supporting colleagues are absorbed informally without corresponding adjustments to workload or support systems. Stabilizing enabling conditions may include improving infrastructure,

strengthening instructional design support, and ensuring that blended learning initiatives are accompanied by realistic workload expectations.

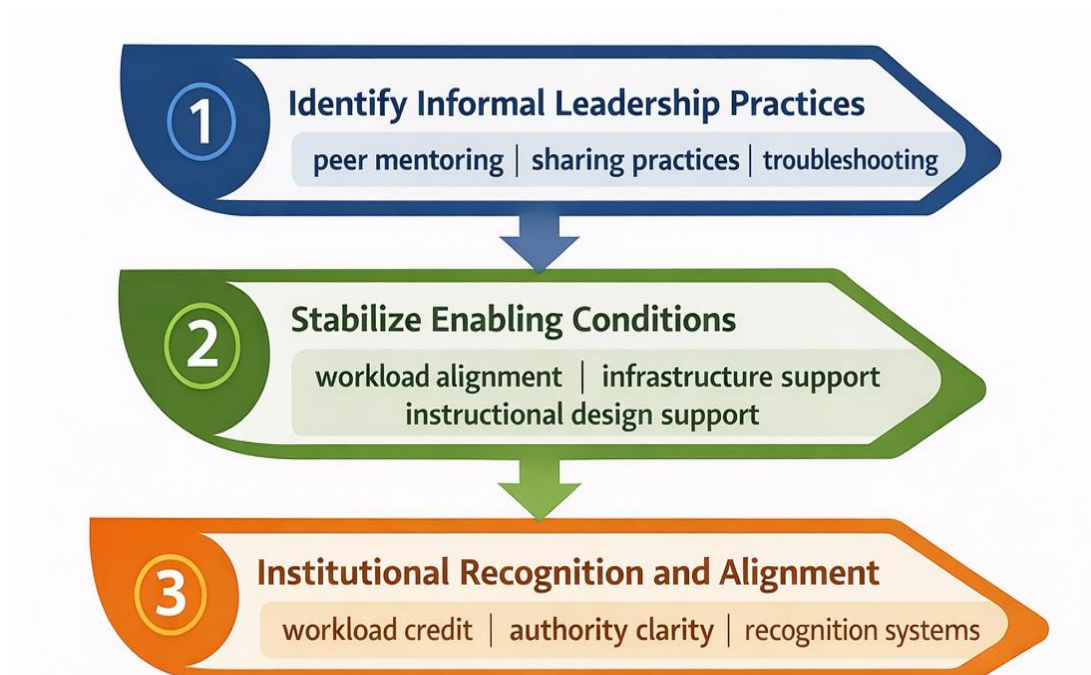
Stage 3: Institutional Recognition and Alignment

The final stage involves aligning institutional systems so that the contributions of informal leaders can be sustained without relying solely on voluntary effort. Participants described situations in which sustained contributions to blended learning were not formally recognized within existing evaluation structures. Institutions may consider forms of recognition that acknowledge leadership contributions while preserving collegial flexibility. Recognition may take the form of workload adjustments, clearer delineation of responsibilities, or acknowledgment of mentoring and coordination work.

Together, these stages illustrate how capacity-building initiatives may shift from a training-centered approach to an alignment-oriented approach. Rather than focusing on developing individual competencies, institutions may strengthen blended learning capacity by aligning workload models, infrastructure, authority arrangements, and recognition structures with institutional expectations. Figure 7 illustrates the staged approach outlined above.

Figure 7

Staged Alignment for Capacity Building in Blended Learning



Note. The staged institutional approach to strengthening blended learning capacity is based on participants' descriptions of how informal leadership develops and operates within conditions of institutional misalignment

The following section considers what such alignment work might mean for institutional leadership practice.

Implications for Institutional Leadership Practice

Taken together, these stages suggest a shift in how institutional leadership approaches capacity-building for blended learning.

In many institutional contexts, capacity-building initiatives focus primarily on expanding professional development for individual faculty members. While training and workshops remain

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valuable, participants' accounts in this study suggested that leadership practices already existed within the system but operated under conditions of uneven institutional support.

The approaches presented in this chapter suggest that institutional leaders may strengthen blended learning capacity not only by expanding faculty training but also by aligning key organizational systems. Attention to workload models, infrastructure, authority structures, and recognition systems may help ensure that work sustained through informal leadership does not rely solely on voluntary or compensatory effort.

This interpretation positions institutional alignment as a central dimension of capacity-building. Rather than creating leadership where none exists, institutional efforts may focus on recognizing, supporting, and stabilizing leadership practices that are already developing within everyday academic work.

Strengthening blended learning leadership requires coordination between professional development and adjustments to infrastructure, workload allocations, and governance arrangements. Leadership capacity is sustained not only by individual competence, but by institutional systems that enable rather than constrain it.

Limitations

My interpretation of the data is shaped by the study's design and analytic focus. The research was conducted as an exploratory qualitative instrumental case study within a Philippine public university system. This design allowed for close examination of informal faculty leadership within its institutional context. However, the insights developed in this study are necessarily situated within the governance structures, cultural norms, and historical conditions of that system.

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The analysis draws primarily on participants' accounts gathered through interviews and a focus group discussion. These accounts provided insight into how informal leadership is experienced and enacted. At the same time, they reflect participants' interpretations of institutional conditions rather than direct observation of organizational processes. The findings therefore represent situated understandings of institutional alignment and misalignment as perceived by informal faculty leaders.

The study deliberately centered the perspectives of faculty identified as informal leaders in blended learning. This focus enabled close examination of their practices and the conditions shaping their work. However, the study does not aim to provide a comprehensive institutional account of blended learning governance across all roles within the system. Other institutional actors may interpret these dynamics differently from their own positional vantage points.

Finally, as with all qualitative inquiry, my positionality shaped the interpretive process. As a faculty member within the same university system and with prior involvement in blended learning initiatives, I was familiar with the institutional contexts in which informal leadership develops. While this familiarity supported access and interpretation, it may also have shaped how I understood and framed participants' accounts of institutional conditions. My prior engagement in capacity-building initiatives may have oriented my analysis toward issues of alignment and support. In addition, my professional status may have influenced how participants presented their experiences. Reflexive practices were employed throughout data collection and analysis to support transparency and analytic rigor. The interpretations presented here should therefore be understood as situated within the context of this inquiry.

Within these boundaries, the study offers an interpretation of how informal faculty leadership and institutional conditions interact in sustaining blended learning practice.

Recommendations for Future Research

This study examined informal faculty leadership within a single institutional context. Future research may extend this work by examining whether similar patterns of compensatory informal leadership emerge across different institutional settings, including private universities or systems with varying levels of technological and organizational support. Comparative studies may help clarify the conditions under which informal leadership becomes necessary.

Longitudinal research may also examine how informal leadership evolves over time, particularly as institutions strengthen or adjust structural support for blended learning. Such work may clarify whether compensatory leadership diminishes with improved alignment or becomes normalized within institutional practice. Further research may also explore how structural conditions shape participation in informal leadership across different faculty groups, including variations related to discipline, rank, or institutional role.

Conclusion

In this study, I examined how informal faculty leadership in blended learning unfolds within conditions of institutional misalignment. The interpretations suggest that informal leadership develops less from individual aspiration than from gaps between institutional expectations and available support. Faculty contributed to making blended learning workable in practice, often assuming coordination and stabilization functions that were neither formally designated nor consistently recognized.

Informal leadership can help sustain blended learning under uneven institutional conditions. At the same time, the compensatory effort described by participants highlights the limits of relying on individual initiative and informal labour when structural support remains incomplete.

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Informal leadership is best understood as situated within the institutional arrangements that shape everyday academic work. The sustainability of blended learning therefore depends not only on individual competence, but also on the coherence and responsiveness of the systems within which that competence is enacted. Strengthening blended learning practice requires closer attention to how expectations, legitimacy, workload, and structural support are aligned within institutional contexts.

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Appendix A: Invitation to Participate as Nominator

INVITATION TO PARTICIPATE AS NOMINATOR

Informal Faculty Leadership in Blended Learning:
A Case Study in Philippine Higher Education

[Date]

Principal Investigator (Researcher):

Maria Rowena Raymundo
mraymundo2@learn.athabasca.ca
[REDACTED]

Supervisor:

Dr. Martha Cleveland-Innes
martic@athabasca.ca

My name is **Maria Rowena Raymundo**, and I am an Ed.D. in Distance Education student at Athabasca University in Alberta, Canada. I am also an Associate Professor at the [REDACTED] at the [REDACTED]. As part of my doctoral requirements, I am conducting research on informal faculty leadership in blended learning within Philippine higher education. The study aims to identify conditions that support or hinder informal faculty leadership in blended learning across the [REDACTED] and use this information to inform the development of a capacity-building program for informal faculty leaders in blended learning. The project is supervised by Dr. Martha Cleveland-Innes.

I invite you to participate as a **nominator to help identify suitable study participants**. Nominators may be faculty peers, faculty administrators, or self. The faculty member(s) you nominate will be contacted and invited to participate in one-hour online interviews and/or focus group interviews, provided they meet the eligibility criteria. They may accept or decline participation, and your nomination will not be disclosed to the nominee.

The purpose of this research project is to contribute to capacity-building efforts for **informal faculty leaders in blended learning** in Philippine higher education institutions. These faculty members **hold no formal positions, yet provide direction and influence in blended learning**. Existing programs to build leadership capacity tend to focus on formal leaders, with no comparable programs for informal leaders. By investigating the conditions that support or hinder informal leadership in the [REDACTED] we aim to **understand their support needs and help shape future programs that address them**.

Your participation involves nominating one or more faculty members from your unit or any academic unit in the [REDACTED] who you believe demonstrate informal leadership in blended learning. You may also nominate yourself. Your input will help identify individuals who meet the study's eligibility criteria, as outlined in the nomination form. Participation is voluntary and based on informed consent, and no reimbursements, incentives, or gifts will be provided. You have the right to withdraw without consequence. You may withdraw from the online nomination process at any point, even partway through, by closing your browser. Once you submit your completed online form, you may withdraw your nomination within seven (7) calendar days from the date of submission.

Nomination data will be collected using Google Forms, a secure online survey platform hosted within the [REDACTED] Google Workspace environment. Completing the informed consent form and nomination form should take approximately 10 to 20 minutes. You may access the **Nomination Portal** by clicking on the following link:

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<LINK TO NOMINATION PORTAL>

Kindly complete your nomination **within two (2) weeks from receipt** of this invitation, or by
<Month Day Year>

Your identity and all information you provide will remain strictly confidential. Data will be anonymized, coded, and stored in encrypted, password-protected files accessible only to the researcher. Your email address will be stored separately from the research data. If data must be transferred to secure cloud storage, this will be done with two-factor authentication and access controls. Study results will be shared with participants through a secure webpage link after the study is completed.

This research will benefit [REDACTED] faculty and academic units by deepening the understanding of how informal leadership operates in academic settings. It aims to help develop programs that better support and nurture informal faculty leaders and blended learning initiatives across the [REDACTED]. No risks beyond those ordinarily encountered in daily life are anticipated as a result of participating in this research.

Upon completion of the study, a plain-language summary of the research findings will be provided to the participants, rather than raw data or individual responses. The summary will be posted on a secure webpage, and a link will be emailed to participants after the study is completed.

Thank you for considering this invitation. For questions or further information, please contact me, Maria Rowena Raymundo, at [REDACTED]; mraymundo2@learn.athabascau.ca, or my supervisor, Dr. Martha Cleveland-Innes, at martic@athabascau.ca.

Maria Rowena Raymundo
Principal Investigator

This research project has been reviewed by the following Research Ethics Boards:

- Athabasca University Research Ethics Board [Certification of Ethical Approval for Ethics PURE ID 15342630 effective 10-2-2025, valid until 10-2-2026. Should you have any comments or concerns about your treatment as a participant, the research, or ethical review processes, please contact the Research Ethics Officer by e-mail at rebsec@athabascau.ca
- [REDACTED] Research Ethics Committee ([REDACTED] REC) [Approval Certificate for Protocol 2025-010-F-[REDACTED]] effective 10-13-2025, valid until 10-14-2026. For concerns, please contact [REDACTED] REC by email at [REDACTED]

Permissions and ethical clearance to conduct the study have been obtained from participating
[REDACTED]

The researcher is a faculty member of the [REDACTED] which is not part of this study. The study is partly supported by the Athabasca University Faculty of Graduate Studies Research Fellowship, an internal merit-based award that provides funding to assist doctoral students with dissertation research.

The researcher is a faculty member of the [REDACTED], which is not part of this study. The study is partly supported by the Athabasca University Faculty of Graduate Studies Research Fellowship, an internal merit-based award that provides funding to assist doctoral students with dissertation research.

Appendix B: Digital Recruitment Poster for Nominator

NOMINATORS NEEDED FOR RESEARCH IN INFORMAL LEADERSHIP

We are looking for volunteers among [REDACTED] faculty to nominate participants for a study on **Informal Faculty Leadership in Blended Learning**

As a nominator, you will **identify one or more UP faculty members you consider informal leaders in blended learning**. Informal leaders hold no formal positions but provide direction and influence in blended learning. Self-nomination is accepted.

Your participation is voluntary and would take up **10–20 minutes of your time**. Your identity will remain **confidential**. By participating as a nominator, you will help us understand **how informal leadership works in academia**. Findings will inform future **capacity-building programs** for informal leaders in the UP System.

Eligible nominees will be invited to the study and may accept or decline. Those who accept will participate in a **one-hour online interview or focus group**, recorded with consent.

Risks of participation are **minimal** and no greater than those ordinarily encountered in daily life.

To learn more about this study, or to participate as a nominator, please contact:

Principal Investigator:

Maria Rowena Raymundo, EdD Candidate, Athabasca University
mraymundo2@learn.athabascau.ca | mdraymundo@up.edu.ph

This study is supervised by: Dr. Martha Cleveland-Innes (martic@athabascau.ca).

This research project has been reviewed by the following Research Ethics Boards:

- Athabasca University Research Ethics Board [Certification of Ethical Approval for Ethics PURE ID 15342630 effective 10-2-2025, valid until 10-2-2026. Should you have any comments or concerns about your treatment as a participant, the research, or ethical review processes, please contact the Research Ethics Officer by e-mail at rebsec@athabascau.ca
- [REDACTED] Research Ethics Committee ([REDACTED] REC) [Approval Certificate for Protocol 2025-010-F-[REDACTED] effective 10-13-2025, valid until 10-14-2026. For concerns, please contact [REDACTED] REC by email at [REDACTED]

Permissions and ethical clearance to conduct the study have been obtained from participating [REDACTED]

The researcher is a faculty member of the [REDACTED] which is not part of this study. The study is partly supported by the Athabasca University Faculty of Graduate Studies Research Fellowship, an internal merit-based award that provides funding to assist doctoral students with dissertation research.

Appendix C: Informational Video Script

Table 7

Informational Video: Storyboard and Voiceover Script

Slide and Time Length	Slide Text Layout	Voiceover Script
1: Title 10 sec	NOMINATORS NEEDED Doctoral Research in Informal Faculty Leadership in Blended Learning A Case Study of the [REDACTED] (Athabasca University)	Hello! I am conducting doctoral research at Athabasca University on Informal Faculty Leadership in Blended Learning, or a mix of online and face-to-face teaching, designed as a case study of the [REDACTED]
2: Call to Action 7 sec	We [REDACTED] to serve as nominators. Nominate colleagues - or yourself - for this study.	We invite [REDACTED] to serve as nominators. You may nominate colleagues, or even yourself, for this study.
3: What is an Informal Leader? 7 sec	Informal leaders are faculty who: • Hold no formal position • Provide direction and influence in blended learning	Informal leaders are faculty who hold no formal leadership positions, yet provide direction and influence in blended learning.
4: Time & Confidentiality 7 sec	Participation is • Voluntary • Only 10–20 minutes • Identity kept confidential	Participation as a nominator is voluntary, takes only 10 to 20 minutes, and your identity will be kept confidential.
5: Why It Matters 8 sec	Your input will help: • Understand informal leadership in academia • Guide capacity-building programs for the [REDACTED]	By joining, you will help us better understand how informal leadership works in academic settings. Your input will guide the design of future capacity-building programs for informal leaders within the [REDACTED]
6: For Nominees 8 sec	Faculty nominees may be invited to: • 1-hour online interview or focus group • Always voluntary, with consent	Faculty members you nominate may be invited to join the study through a one-hour online interview or focus group. Their participation is also voluntary and with consent.

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Slide and Time Length	Slide Text Layout	Voiceover Script
7: Ethics & Approval 8 sec	This study has been reviewed by: - Athabasca University REB (lead institution) ██████████ REB (study site)	This project has been reviewed by the Athabasca University Research Ethics Board, the lead institution, and by the ██████████ Research Ethics Board as the study site.
8: Contact Info 8 sec	To learn more, contact: Maria Rowena Raymundo Doctoral candidate, Athabasca University, Canada  ██████████ mraymundo2@learn.athabascau.ca Supervised by: Dr. Martha Cleveland-Innes  martic@athabascau.ca	If you'd like to participate or learn more, please contact me, Maria Rowena Raymundo, EdD student at Athabasca University, at ██████████ or mraymundo2@learn.athabascau.ca This study is supervised by Dr. Martha Cleveland-Innes. Thank you for supporting this research!

Footer (all slides, small font)

“Doctoral research, Athabasca University. The ██████████ is the study site, not the sponsor.”

Note. This table presents the storyboard and corresponding voiceover script used to develop the informational video for nominator recruitment

Appendix D: Online Nominator Informed Consent Form

**Informal Faculty Leadership in Blended Learning:
A Case Study in Philippine Higher Education**

ONLINE NOMINATOR INFORMED CONSENT FORM

Principal Researcher:

Maria Rowena Raymundo
mraymundo2@learn.athabasca.ca

Supervisor:

Dr. Martha Cleveland-Innes
martic@athabasca.ca

You are invited to participate as a nominator in a research study on informal faculty leadership in blended learning within Philippine higher education. This study aims to identify the conditions that support or hinder informal faculty leadership in blended learning across the [REDACTED] System and use this information to inform the development of a capacity-building program for informal faculty leaders in [REDACTED]. I am conducting this study as a requirement for my Ed.D. in Distance Education.

As a nominator, you are asked to participate in this study by completing a short online questionnaire form nominating one or more faculty members from your unit or any other academic unit in the [REDACTED] System who you believe demonstrate informal leadership in blended learning. You may also choose to nominate yourself. Your input will help identify individuals who meet the study's eligibility criteria, as outlined in the nomination form. Participation is voluntary and based on informed consent. You are free to withdraw at any time without consequence. Completing the informed consent form and nomination form should take about 10–20 minutes.

The faculty member(s) you nominate will be contacted and invited to participate in one-hour online interviews and/or focus group discussions, provided they meet the eligibility criteria. They may choose to accept or decline participation, and your nomination will not be disclosed to the nominee.

This research would benefit [REDACTED] faculty and academic units by deepening the understanding of how informal leadership operates in academic settings. It will enable programs to better support and nurture informal faculty leaders and blended learning initiatives in the UP System. I do not anticipate that you will face any risks greater than those ordinarily encountered in daily life as a result of participating in this research.

Involvement in this study is entirely voluntary, and you may refuse to answer any questions or to share information that you are not comfortable with. Since both nominators and study participants must be [REDACTED] faculty members, you will be asked to indicate your constituent university, and your email address will be recorded to verify your affiliation. This information will be kept strictly confidential. All information you provide during the study will be anonymized, coded, and securely stored in encrypted, password-protected files and devices accessible only to the researcher. Your email address will be stored separately from the research data.

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While in the process of accomplishing the online form, you may withdraw from the nomination process by simply closing out of your browser. Once you submit your completed online form, you may withdraw your nomination within seven (7) calendar days from the date of submission. To do so, please contact the researcher via the contact details provided. After this period, the nomination data will have been incorporated into the study and cannot be removed.

Please retain a copy of this consent form for your records.

The researcher acknowledges that Google Forms, the host of the online survey, does not collect or store IP addresses of respondents by default. In the event that this information may be made accessible to the researchers, it will not be used or saved on the researcher's system without the participant's consent. Because this project uses online data collection, there is a small risk that data transmitted via the internet could be accessed by third parties. While this risk is minimal and unlikely, absolute confidentiality during transmission cannot be guaranteed. To reduce this risk, secure platforms (Google Forms and Zoom) will be used, and all data will be encrypted, anonymized, and stored on password-protected systems.

All hard copy data will be kept in locked cabinets in my office. All electronic data will be kept in a password-protected computer at my office. All information and records will be destroyed by confidential shredding; electronic records will be deleted at a date when all project requirements have been met, and all research objectives have been fulfilled.

Upon completion of the study, a plain-language summary of the research findings will be provided to the participants, rather than raw data or individual responses. The summary will be posted on a secure webpage, and a link will be emailed to participants after the study is completed.

The existence of the research will be listed in an abstract posted online at the Athabasca University Library's Digital Thesis and Project Room and [REDACTED] the official institutional repository of the [REDACTED]. The final research paper will be publicly available in both repositories.

If you have any questions about this study or require further information, please contact Maria Rowena Raymundo or Dr. Martha Cleveland-Innes using the contact information above.

This research project has been reviewed by the following Research Ethics Boards:

- Athabasca University Research Ethics Board [Certification of Ethical Approval for Ethics PURE ID 15342630 effective 10-2-2025, valid until 10-2-2026. Should you have any comments or concerns about your treatment as a participant, the research, or ethical review processes, please contact the Research Ethics Officer by e-mail at rebsec@athabascau.ca
- [REDACTED] Research Ethics Committee ([REDACTED] REC) [Approval Certificate for Protocol 2025-010-F-[REDACTED]] effective 10-13-2025, valid until 10-14-2026. For concerns, please contact [REDACTED] REC by email at [REDACTED]

Permissions and ethical clearance to conduct the study have been obtained from participating
[REDACTED]

INFORMAL FACULTY LEADERSHIP IN BLENDED LEARNING

The researcher is a faculty member of the [REDACTED] [REDACTED] which is not part of this study. The study is partly supported by the Athabasca University Faculty of Graduate Studies Research Fellowship, an internal merit-based award that provides funding to assist doctoral students with dissertation research.

Thank you for your assistance in this project.

CONSENT:

The completion of the questionnaire and its submission is viewed as your consent to participate.

BEGIN THE SURVEY

Appendix E: Invitation to Participate as a Study Participant

Informal Faculty Leadership in Blended Learning: A Case Study in Philippine Higher Education

INVITATION TO PARTICIPATE (Study Participant)

[Date]

Principal Investigator (Researcher):

Maria Rowena Raymundo
mraymundo2@learn.athabasca.ca

Supervisor:

Dr. Martha Cleveland-Innes
martic@athabasca.ca

My name is Maria Rowena Raymundo, and I am an Ed.D. in Distance Education student at Athabasca University in Alberta, Canada. I am also an Associate Professor at [REDACTED]. As a requirement to complete my doctoral degree, I am conducting a research project about informal faculty leadership in blended learning within Philippine higher education. This study aims to identify the conditions that support or hinder informal faculty leadership in blended learning across the [REDACTED] System and use this information to inform the development of a capacity-building program for informal faculty leaders in UP. I am conducting this project under the supervision of Dr. Martha Cleveland-Innes.

I invite you to participate in this project because your colleagues have nominated you as an informal leader in blended learning in the [REDACTED] System. This suggests that they recognize your role in providing direction and influencing others in their blended learning practice, even if you do not currently hold a formal position in [REDACTED]. Your participation is entirely voluntary and based on informed consent. You may withdraw at any time without consequence. The estimated time commitment for an interview is approximately one hour, while other activities, such as reviewing the informed consent form and verifying interview transcripts, may take 45-60 minutes.

The purpose of this research project is to contribute to capacity-building efforts for informal faculty leaders in blended learning in Philippine higher education institutions. These faculty members hold no formal positions, yet provide direction and influence in blended learning. Existing programs to build leadership capacity tend to focus on formal leaders, with no comparable programs for informal leaders. By investigating the conditions that support or hinder informal leadership in the [REDACTED] System, we aim to understand the support needs of informal leaders to help shape future programs that address these needs.

Your participation in this project would involve participating in an online one-on-one, in-depth semi-structured interview conducted via Zoom. In some cases, you may be invited to an online focus group interview. In both situations, the interview will be audio- and video-recorded with your consent, and it will be scheduled at a date and time that is convenient for you. I will ensure your proper preparation for the interview by providing you with clear and detailed instructions, a reasonable amount of time for preparation, reminders, and opportunities to review and clarify your responses.

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Your identity will be kept strictly confidential. All information you provide during the study will be anonymized, coded, and securely stored in encrypted, password-protected files and devices accessible only to the researcher. Your name and email address will be stored separately from the research data. If data need to be transferred to secure cloud storage, this will be done using two-factor authentication and access controls.

This research should benefit [REDACTED] faculty and academic units by deepening the understanding of how informal leadership works in academic settings. It will enable programs to support better and nurture informal faculty leaders and blended learning initiatives in the [REDACTED] System. I do not anticipate that you will face any risks greater than those ordinarily encountered in daily life as a result of participating in this research.

Upon completion of the study, a plain-language summary of the research findings will be provided to the participants, rather than raw data or individual responses. The summary will be posted on a secure webpage, and a link will be emailed to participants after the study is completed.

Thank you for considering this invitation. If you have any questions or would like more information, please contact me, Maria Rowena Raymundo, by email at [REDACTED] or my supervisor, Dr. Martha Cleveland-Innes, by email at martic@athabascau.ca.

Thank you.

Maria Rowena Raymundo

This research project has been reviewed by the following Research Ethics Boards:

- Athabasca University Research Ethics Board [Certification of Ethical Approval for Ethics PURE ID 15342630 effective 10-2-2025, valid until 10-2-2026. Should you have any comments or concerns about your treatment as a participant, the research, or ethical review processes, please contact the Research Ethics Officer by e-mail at rebsec@athabascau.ca
- [REDACTED] Research Ethics Committee ([REDACTED] REC) [Approval Certificate for Protocol 2025-010-F-[REDACTED] effective 10-13-2025, valid until 10-14-2026. For concerns, please contact [REDACTED] REC by email at [REDACTED]

Permissions and ethical clearance to conduct the study have been obtained from participating [REDACTED]

The researcher is a faculty member of the [REDACTED] which is not part of this study. The study is partly supported by the Athabasca University Faculty of Graduate Studies Research Fellowship, an internal merit-based award that provides funding to assist doctoral students with dissertation research.

Appendix F: Study Participant Informed Consent Form

STUDY PARTICIPANT INFORMED CONSENT FORM

Informal Faculty Leadership in Blended Learning:
A Case Study in Philippine Higher Education

[Date]

Principal Investigator (Researcher):

Maria Rowena Raymundo
mraymundo2@learn.athabasca.ca

Supervisor:

Dr. Martha Cleveland-Innes
martic@athabasca.ca

You are invited to take part in a research project entitled 'Informal Faculty Leadership in Blended Learning: A Case Study in Philippine Higher Education'

This form is part of the process of informed consent. The information presented should give you the basic idea of what this research is about and what your participation will involve, should you choose to participate. It also describes your right to withdraw from the project. In order to decide whether you wish to participate in this research project, you should understand enough about its risks, benefits and what it requires of you to be able to make an informed decision. This is the informed consent process. Take time to read this carefully as it is important that you understand the information given to you. Please contact the principal investigator, Maria Rowena Raymundo if you have any questions about the project or would like more information before you consent to participate.

It is entirely up to you whether you take part in this research. If you choose not to take part, or if you decide to withdraw from the research once it has started, there will be no negative consequences for you now, or in the future.

Introduction

My name is Maria Rowena Raymundo and I am an Ed.D. in Distance Education student at Athabasca University. As a requirement to complete my degree, I am conducting a research project about informal faculty leadership in blended learning within Philippine higher education. This case study aims to identify the conditions that support or hinder informal faculty leadership in blended learning across the [REDACTED] and use this information to inform the development of a capacity-building program for informal faculty leaders in [REDACTED]. I am conducting this project under the supervision of Dr. Martha Cleveland-Innes.

Why are you being asked to take part in this research project?

You are being invited to participate in this project because your colleagues have nominated you as an informal leader in blended learning in the [REDACTED]. This suggests that they recognize your role in providing direction and influencing others in their blended learning practice, even if you do not currently hold a formal position in [REDACTED].

What is the purpose of this research project?

The purpose of this research project is to contribute to capacity-building efforts for informal faculty leaders in blended learning in Philippine higher education institutions. These faculty

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members hold no formal positions, yet provide direction and influence in blended learning. Existing programs to build leadership capacity tend to focus on formal leaders, with no comparable programs for informal leaders. By investigating the conditions that support or hinder informal leadership in the [REDACTED], we aim to understand the support needs of informal leaders to help shape future programs that address these needs.

What will you be asked to do?

Your participation in this project would involve participating in an online one-on-one, in-depth semi-structured interview conducted via Zoom. In some cases, you may be invited to participate in an online focus group interview. In both situations, the interview will be audio- and video-recorded with your consent, and it will be scheduled at a date and time that is convenient for you. I will ensure your proper preparation for the interview by providing you with clear and detailed instructions, a reasonable amount of time for preparation, reminders, and opportunities to review, clarify, and alter your responses in the transcript. Participants may request accommodations (e.g., accessibility support, alternative formats, or extended time) to ensure equitable participation. No deception or partial disclosure will be used in this study; you will be fully informed before choosing to participate. The estimated time commitment for an interview is approximately one hour, while other activities, such as reviewing the informed consent form and verifying interview transcripts, may take up to 45 minutes to one hour.

What are the risks and benefits?

This research should benefit [REDACTED] faculty and academic units by deepening the understanding of how informal leadership works in academic settings. It will enable programs to better support and nurture informal faculty leaders and blended learning initiatives in the [REDACTED]. I do not anticipate that you will face any risks greater than those ordinarily encountered in daily life as a result of participating in this research.

Do you have to take part in this project?

As stated earlier in this letter, involvement in this project is entirely voluntary, and no reimbursements, incentives, or gifts will be provided. During the interview, you may decline to answer any question or choose to stop participating at any point during the data collection process, including ending the interview partway through. If you choose to withdraw during the interview, any data collected up to that point will not be used and will be securely deleted. After the interview has ended and data has been collected, if you choose to withdraw, your data can be removed from the project at your request, up to seven (7) days after your interview. Beyond this date, the data will have been anonymized and incorporated into the analysis, and it will no longer be possible to remove. However, your identity will remain confidential, and no personally identifying information will be included in any findings or published materials.

How will your privacy and confidentiality be protected?

The ethical duty of confidentiality includes safeguarding participants' identities, personal information, and data from unauthorized access, use or disclosure. Your privacy and confidentiality will be protected throughout the study. All digital files will be kept in password-protected folders on an encrypted device accessible only to the researcher. If data needs to be transferred to secure cloud storage, this will utilize two-factor authentication and access controls. Any data shared in research reports, presentations, or publications will be presented in a way that does not identify individual participants.

How will my anonymity be protected?

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Anonymity refers to protecting participants' identifying characteristics, such as name or physical appearance. In this study, your name and other direct identifiers will be removed from the data and replaced with a unique code. Only the researcher will have access to the master list linking participant identities to these codes, and this list will be stored securely and separately from the research data. You will not be identified in any reports, presentations, or publications without your explicit permission. **However, due to the small and specialized nature of the participant group (e.g., faculty within the [REDACTED]) it may be remotely possible for someone familiar with the context to infer your identity based on indirect details, such as the experiences described. Every reasonable effort will be made to ensure your anonymity and minimize the risk of unintentional identification.**

There is also a difference between anonymous participation and anonymous data. **For example, participants' anonymity cannot be guaranteed if data is collected in a group setting, such as an online focus group setting, but the data obtained from that participation can be reported without identifiers.**

How will the data collected be stored?

All research data will be stored in secure, password-protected folders on an encrypted device that only the researcher can access. To protect your confidentiality, any identifying information will be removed and replaced with a pseudonym or participant code. If any paper records are created, they will be kept in a locked cabinet. Because the study involves a small academic community, your data will not be shared in any open-access repository to avoid the risk of indirect identification. Personal data will be kept only as long as needed to complete the approved research. After that, all data will be securely deleted or destroyed in a way that prevents it from being recovered or reconstructed.

De-identified transcripts and analytic summaries may be securely retained by the researcher. Any secondary use of this data for future research projects would require new and separate approval from the Athabasca University Research Ethics Board before such use is undertaken. No linking with other datasets will occur, and no identifiable information will be shared. All secondary use of de-identified or anonymized data will be subject to the same standards of confidentiality and anonymity as in the original research project.

The researcher acknowledges that Google Forms, the host of the online survey, does not collect or store IP addresses of respondents by default. In the event that this information may be made accessible to the researchers, it will not be used or saved without participant's consent on the researcher(s) system. Further, because this project employs e-based collection techniques, data may be subject to access by third parties as a result of various security legislation now in place in many countries and thus the confidentiality *and privacy of data cannot be guaranteed during web-based transmission.*

This study will use the *Zoom video/audio conferencing software* to collect data, which is an externally hosted cloud-based service. When information is transmitted over the internet privacy cannot be guaranteed. There is always a risk your responses may be intercepted by a third party (e.g., government agencies, hackers). Further, while the researcher(s) will not collect or use IP address or other information which could link your participation to your computer or electronic devices without informing you, there is a small risk with any platform such as this of data that is collected on external servers falling outside the control of the research team. If you are concerned about this, we would be happy to make alternative arrangements (where possible) for you to participate, perhaps via telephone. Please contact the researcher for further information.

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Recordings (audio/video) will be saved in a password-protected file on the research team members' local computers and not to a cloud-based service. It will then be transferred to the Google Drive of the [REDACTED] Google Workspace, which offers secure cloud storage with two-factor authentication and access controls.

Please note that it is the expectation that participants agree not to make any unauthorized recordings of the content of a meeting/data collection session.

Who will receive the results of the research project?

- The existence of the research will be listed in an abstract posted online at the Athabasca University Library's Digital Thesis and Project Room, and the final research paper will be publicly available.
- The existence of the research will be listed in an abstract posted online in [REDACTED], the official institutional repository of the [REDACTED], and the final research paper will be made publicly available.
- With your permission, direct quotations from your interview may be used in research reports, presentations, or publications. However, any identifying details will be removed or altered to protect your confidentiality. If you do not consent to the use of quotations, your input will be reported only in summarized or aggregate form.
- Audio and/or video recordings will be used solely for data collection and analysis purposes. These recordings will not be used in any reports, presentations, or publications. No part of the audio or video will be shared publicly, and identifiable content will not be disclosed.
- Upon completion of the study, a plain-language summary of the research findings will be provided to the participants, rather than raw data or individual responses. The summary will be posted on a secure webpage, and a link will be emailed to participants after the study is completed.

Who can you contact for more information or to indicate your interest in participating in the research project?

Thank you for considering this invitation. If you have any questions or would like more information, please contact me, Maria Rowena Raymundo by e-mail <mraymundo2@learn.athabascau.ca> or my supervisor by email <martic@athabascau.ca>.

If any part of the interview or focus group raises professional or personal concerns for you, please let the researcher know. Information about available institutional or community support resources may be provided upon request.

If you are ready to participate in this project, *please complete and sign the attached Consent Form and return it by [provide directions on who, where, how and by when]* **OR** *please proceed to review the following consent and complete the survey.*

Thank you.

Maria Rowena Raymundo

This research project has been reviewed by the following Research Ethics Boards:

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- Athabasca University Research Ethics Board [Certification of Ethical Approval for Ethics PURE ID 15342630 effective 10-2-2025, valid until 10-2-2026. Should you have any comments or concerns about your treatment as a participant, the research, or ethical review processes, please contact the Research Ethics Officer by e-mail at rebsec@athabascau.ca
- [REDACTED] Research Ethics Committee ([REDACTED] REC) [Approval Certificate for Protocol 2025-010-F-[REDACTED]] effective 10-13-2025, valid until 10-14-2026. For concerns, please contact [REDACTED] REC by email at [REDACTED]

Permissions and ethical clearance to conduct the study have been obtained from participating [REDACTED].

The researcher is a faculty member of the [REDACTED] which is not part of this study. The study is partly supported by the Athabasca University Faculty of Graduate Studies Research Fellowship, an internal merit-based award that provides funding to assist doctoral students with dissertation research.

Informed Consent:

- You have read the information about the research project.
- You have been able to ask questions about this project.
- You are satisfied with the answers to any questions you may have had.
- You understand what the research project is about and what you will be asked to do.
- You understand that you are free to withdraw your participation in the research project without having to give a reason, and that doing so will not affect you now, or in the future.
- You understand that if you choose to end your participation **during** data collection, any data collected from you up to that point will be destroyed.
- You understand that if you choose to withdraw **after** data collection has ended, your data can be removed from the project at your request, provided that this request is made **within seven (7) days after your individual or focus group interview**. After this date, the data will have been anonymized and incorporated into the analysis, and it will no longer be possible to remove. However, your identity will remain confidential, and no personally identifying information will be included.

	YES	NO
I agree to be audio-recorded	☐	☐
I agree to be video recorded	☐	☐
I agree to the use of direct quotations	☐	☐
I understand that the final dissertation, which may contain de-identified data, will be archived/deposited in Athabasca University Library's Digital Thesis and Project Room	☐	☐
I understand that the final dissertation, which may contain de-identified data, will be archived/deposited in [REDACTED]	☐	☐
I am willing to be contacted following the interview to verify that my comments are accurately reflected in the transcript.	☐	☐

Your signature confirms:

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- You have read what this research project is about and understood the risks and benefits. You have had time to think about participating in the project and had the opportunity to ask questions and have those questions answered to your satisfaction.
- You understand that participating in the project is entirely voluntary and that you may end your participation at any time without any penalty or negative consequences.
- You have been given a copy of this Informed Consent form for your records; and
- You agree to participate in this research project.

Signature of Participant

Date

Principal Investigator's Signature:

I have explained this project to the best of my ability. I invited questions and responded to any that were asked. I believe that the participant fully understands what is involved in participating in the research project, any potential risks and that they have freely chosen to participate.

Signature of Principal Investigator

Date

Please retain a copy of this consent information for your records.

Appendix G: Data Management Plan

Title of Proposed Dissertation: Informal Faculty Leadership in Blended Learning: A Case Study in Philippine Higher Education

Doctoral Student: Maria Rowena Raymundo

Program: Ed. D. in Distance Education

Institution: Athabasca University

Date: 30 June 2025

This data management plan is based on the "Alliance Simplified Template (Funding Application Stage)" template provided by Digital Research Alliance of Canada, Template version 0, published on May 16, 2024.

Ethical, Legal or Commercial Considerations

This research study involves human participants and will abide by the ethical requirements of both Athabasca University and the [REDACTED] as approved by their respective Research Ethics Boards. Informed consent will be secured prior to participation, and participant confidentiality will be protected throughout the study. The study will not employ deception or partial disclosure; participants will be fully informed of the research purpose and procedures before providing consent. All data, including recordings, transcripts, and survey responses, will be de-identified and stored in secure locations, with access restricted to the researcher.

There are no legal, commercial, or intellectual property issues anticipated in connection with the data. The study does not involve Indigenous communities or high-risk or sensitive commercial information. Nonetheless, because the research is situated within a university setting in the Philippines, institutional and cultural dynamics will be considered carefully, and findings will be presented in a manner that upholds confidentiality and respects the professional, institutional, and cultural context.

Data Collection

Data Types

1. The proposed research study will collect data from a nomination form administered via *Google Form*. It will include the names of individuals nominated to be study participants, as well as the names, email addresses, constituent universities, and nominator statuses (i.e., peer-, administrator-, or self-nominator) of the nominator-respondents.
2. Digital audio-video recordings and text-based transcripts will be generated from semi-structured interviews and focus group discussions conducted using Zoom
3. It will include materials to support the document analysis component of the study. These may include institutional reports, policy guidelines, training manuals, meeting summaries, and other records that illustrate how blended learning and informal leadership are practiced or supported in the university. These may have both written content and visual elements, and will be kept in their original file formats (such as .pdf, .docx, or image files).
4. Marked-up transcripts, code lists, and thematic notes will be created using manual coding.
5. Coded transcripts, memos, and node structures will be created during qualitative analysis with NVivo.

Data File Formats

In selecting the file formats of the data, the researcher will strive to balance accessibility, software independence, and long-term preservation needs. Data will be collected in both proprietary and non-proprietary formats. Non-proprietary formats support compatibility and long-term accessibility without reliance on proprietary software. However, some formats (e.g., MP4), though not entirely non-proprietary, are so widely accessible and interoperable across platforms and systems that they are considered acceptable formats for storage and sharing. The formats are influenced by the software applications used in the research. The study will utilize Google Workspace, Microsoft Office, and Zoom applications, as these tools are provided at no cost to the faculty of the [REDACTED] including both the researcher and the study participants.

Nomination Phase. Data from the round of nominations of study participants will be collected through Google Forms. Google Forms does not have a dedicated file format; however, it automatically stores responses in a spreadsheet in Google Sheets, which can export the data in `.csv` (i.e., comma-separated values, a non-proprietary, plain-text format) and `.xlsx` (a proprietary Microsoft Excel file format). Data in Google Sheets can also be saved as a PDF (a non-proprietary Portable Document Format).

Online Interviews and Online Focus Groups Phase. Data from semi-structured interviews and focus groups will be collected using Zoom. The researcher will record the sessions with prior consent from participants, and recordings will be saved to the cloud in `.mp4` format, Zoom's standard video file type, which captures both audio and video. Although `.mp4` is not entirely non-proprietary, it is widely accepted for long-term access and sharing due to its interoperability. The researcher will enable Zoom's auto-transcription feature to generate text transcripts of the interview and focus group sessions. The files will be saved in `.vtt` (Web Video Text Tracks) or `.txt` (simple text) formats, and include time-stamped segments that correspond to the audio. Both `.vtt` and `.txt` formats are non-proprietary and well-suited for data re-use, sharing, and long-term access.

Documents and Photographs. Participants will be asked to provide digital copies or duplicates of any documents or photographs. If originals are provided, these will be securely duplicated and returned to the participant without delay. All documents and photographs collected during the study will be digitized and stored in secure, password-protected folders on an encrypted hard drive accessible only to the researcher. To ensure long-term accessibility and preservation, scanned documents will be saved in PDF/A, an International Organization for Standardization (ISO)-standardized version of PDF designed for long-term archiving. Digitized photographs will be stored as high-resolution `.jpeg` or `.png` files. Each file will be systematically labelled using a consistent naming convention that reflects the data type, date, and participant code. Metadata will be recorded in a separate, secure log to support future organization and retrieval.

Transcripts. The transcripts will be downloaded, carefully reviewed by the researcher and participant, edited to correct any inaccuracies, de-identified to protect participant privacy, and saved in `.docx` and `.txt` format for further use. Since the `.docx` format is proprietary, the final de-identified transcripts will also be saved in non-proprietary `.txt` format for long-term preservation, sharing, and ease of access. The processed and cleaned data will also be stored in `.csv` format where applicable, to ensure compatibility and accessibility across various platforms.

Qualitative Data Analysis. The analysis of qualitative data will involve manual coding. Notes, code lists, and marked-up transcripts from the manual process will be organized and saved

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in commonly used formats such as .txt, .docx, or .xlsx, depending on the nature of the material.

Documentation for Future Re-use or Validation

The researcher will carefully organize and document all data collected in this study to ensure and facilitate future re-use or validation. Transcripts will be labelled using anonymized participant codes, along with the date of collection and the setting in which the data were gathered.

A detailed data log will be maintained throughout the research to record file versions, sources, and key actions taken during data processing. For each file, basic information such as the method of data collection, file type, and any changes made (e.g., removal of identifying information or edits for readability) will be noted. The coding structure and analytic categories used in the qualitative analysis will also be documented to provide a clear account of how interpretations were developed.

The researcher will consistently use file-naming conventions and internal notes to support good data management and ensure that the data remains understandable over time.

Data Storage and Backup

Data will be securely stored and systematically managed across all stages of the research, from collection and processing to analysis and dissemination. During data collection, raw files, such as .mp4 recordings from Zoom and .csv survey outputs from Google Forms, will be temporarily stored on encrypted, password-protected devices before being transferred to the [REDACTED] Google Workspace. This platform offers secure cloud storage with two-factor authentication and access controls.

All versions of the data - including raw, cleaned, de-identified, and analytic files - will be organized in clearly labelled folders with consistent version tracking. Separate directories will be used for original recordings, working transcripts, anonymized data, and coded materials. Data analysis will involve manual coding. Key elements of the analysis, such as coding frameworks, node summaries, and memos, will be exported in accessible formats (e.g., .docx or .txt). Materials from manual coding will also be saved using standard file types such as .docx or .txt, .txt or .xlsx.). Any materials used for dissemination (e.g., quotes or excerpts) will be derived exclusively from de-identified data.

Access to all research data will be limited to the researcher. All devices used in the research will be encrypted and password protected. The master list that links participant names and email addresses with assigned codes (i.e., information necessary to manage communication, confirm consent, share transcripts for checking, and respond to withdrawal requests) will be stored securely in a password-protected file, separate from the research data. Identifiable information will not be included in transcripts, analysis, or reporting. Only the researcher will have access to the master list, which will be retained until completion of the dissertation and any required follow-up. The file will then be securely destroyed, as detailed in the section on long-term management of data.

Research data will not be stored on public or shared computers. To minimize the risk of data loss, files will be automatically backed up via the institutional cloud system, and additional encrypted backups will be created and stored on external drives. A data log will be maintained throughout the study to monitor file versions, storage locations, and major updates.

Long-term Management of Data

Once the project is completed, cleaned and de-identified versions of essential datasets, including interview and focus group transcripts, codebooks, and analytical summaries will be prepared for long-term archiving. The data will not be deposited into any open-access data

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repository and will be used solely for the purposes of this research project. Due to the detailed nature of qualitative data, even anonymized transcripts may contain contextual information that could inadvertently reveal participant identities. Given the small and specific population involved in this study, the risk of deductive disclosure is too high to ethically allow open-access data sharing.

Due to their large file size, proprietary format, and the need to maintain confidentiality, raw audio-visual recordings will be retained by the researcher.

Long-term storage will be maintained through institutional cloud services, supplemented by encrypted local backups on external drives. Any publications arising from the research will include appropriate citations and data availability statements to promote transparency and responsible data sharing.

Data collected for this study will be kept only for as long as needed to carry out the approved research objectives. After these purposes have been fulfilled, the data will be securely deleted or destroyed in accordance with institutional and ethical guidelines. The disposal or permanent deletion of records may be done through any means that ensures that it is impossible to reconstruct the information contained therein. Records will be permanently deleted or disposed of using methods that ensure the information cannot be recovered or reconstructed in any form. Identifiers collected during the nomination process (names and email addresses) will be separated from the data at the earliest opportunity and securely deleted once no longer required for communication and verification.

Appendix H: Athabasca University Research Ethics Approval



Certification of Ethical Approval

CERTIFICATION OF ETHICAL APPROVAL

The Athabasca University Research Ethics Board (AUREB) has reviewed and approved the research project noted below. The REB is constituted and operates in accordance with the current version of the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (TCPS2) and Athabasca University Policy and Procedures.

ETHICS PURE ID: 15342630

Principal Investigator/Faculty: Rowena Raymundo, Faculty of Humanities & Social Sciences

Supervisor: Marti Celeveland-Innes, Faculty of Humanities & Social Sciences

Project Title: Informal Faculty Leadership in Blended Learning: A Case Study in Philippine Higher Education

Effective Date: 10/2/2025 **Expiry Date:** 10/2/2026

Restrictions:

Any modification to the approved research activities must be submitted to the AUREB for approval prior to proceeding. Any adverse event or incidental findings must be reported to the AUREB as soon as possible, for review.

Ethical approval is valid **for a period of one year**. A request for renewal must be submitted and approved by the above expiry date if a project is ongoing beyond one year.

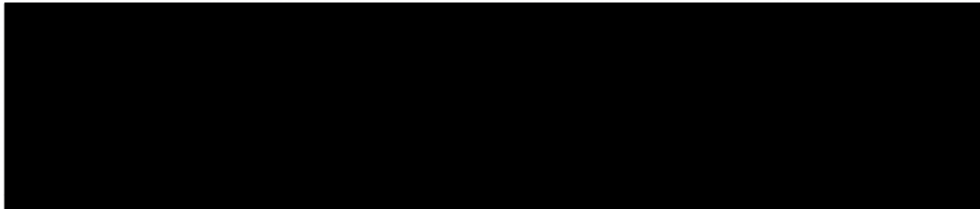
An Ethics Final Report must be submitted when the research is complete (*i.e. all participant contact and data collection is concluded, no follow-up with participants is anticipated and findings have been made available/provided to participants (if applicable)*) or the research is terminated.

Approved by:

Date: 10/2/2025

Eloy Rivas Sanchez, Chair
Faculty of Humanities and Social Sciences Departmental Ethics Review Committee
Athabasca University Research Ethics Board

Appendix I. The University System Research Ethics Committee Approval



RESEARCH ETHICS COMMITTEE

APPROVAL CERTIFICATE

12 October 2025

This is to certify that the following protocol and related documents was reviewed by the [REDACTED] Research Ethics Committee ([REDACTED] REC). The Committee was satisfied that the protocol meets the ethical guidelines for educational research and has granted approval.

REC Protocol No.	2025-010-F-[REDACTED]		
Principal Investigator(s)	Maria Rowena Raymundo		
Title	Informal Faculty Leadership in Blended Learning: A Case Study in Philippine Higher Education		
Document Type	Study Protocol		
Protocol Version No.	01	Version Date	October 6, 2025
Other Documents	1. Application Form 2. Letter of request for review 3. Curriculum Vitae of the Researcher 4. Full Research Proposal/Study Protocol 5. Study Protocol Assessment Form 6. Informed Consent Checklist Form 7. Non-Health Related Assessment Form 8. Diagrammatic Workflow 9. Informed Consent Form 10. Ethics Training Certificate 11. Technical Review Approval/Advisory Committee Approval/Faculty RPC Approval 12. Revision Matrix 13. Plagiarism Check Result 14. AU Certification of Ethics Approval Grad Stud		
Type of Review	☒ Expedited ☐ Full Board Meeting Date: N/A	Duration of Approval from Date to:	13 October 2025 to 14 October 2026

Please refer to the terms of approval on the succeeding page.



Terms of approval (failure to comply with the terms below is in breach of your approval):

1. Upon consultation with the [REDACTED], it was confirmed that since you already have an Ethics Certification from your university, it is recognized as an ethics clearance for the [REDACTED] community only and not applicable to other [REDACTED].
2. The Principal Investigator is responsible for ensuring that the permission letters are obtained, if relevant, before any data collection can occur at the specified organisation.
3. Approval is only valid for the conduct of the study with the title specified above. The Principal Investigator shall inform the Committee of any change in the details of the study.
4. It is the responsibility of the Principal Investigator to ensure that all investigators are aware of the terms of approval and to ensure that the study is conducted as approved by the Committee.
5. Amendments to the approved protocols, however minor, must not commence without the approval from the Committee.
6. On the expiry date (14 October 2026), the Principal Investigator must submit a final report to the Committee.
7. Should the study require more time to complete (beyond the expiry date of this approval), the Principal Investigator may request an extension. Approval of the extensions is subject to the evaluation of the Committee.
8. The study may be subject to an audit or any form of monitoring by the Committee at any time.
9. The Principal Investigator is responsible for the storage and retention of the original data pertaining to the study for a minimum period of five years from the date of the collection.

[REDACTED]
[REDACTED] Chair

Note. In addition to the ethics approval documented above, permission to conduct the study was obtained through appropriate institutional channels across all participating Autonomous Universities within The University System. These permissions were granted based on the approved ethics clearance and institutional affiliation. Individual approval letters are not reproduced here to preserve institutional anonymity and avoid unnecessary duplication.

Appendix J: Interview Guide

Opening and Consent (3–5 minutes)

Thank you so much for taking the time to meet with me today. I truly appreciate it. The purpose of this study is to better understand informal faculty leadership in blended learning, particularly the conditions that support and hinder how faculty members influence and support others in their blended learning practice. Your participation is voluntary. You may decline to answer any question or withdraw at any time without any consequences. Everything you share will be kept confidential and anonymized in all reports. With your permission, I would like to record this interview and have it transcribed via Zoom to ensure accuracy. The recording and transcript will be stored securely. Do I have your consent to proceed and to record and transcribe this session? (Wait for verbal consent before starting the recording.)

Background Questions (3–5 minutes)

1. What is your academic rank?
2. What is your academic discipline or field?
3. About what year did you begin using blended learning, and what prompted you to do so?
4. Can you briefly describe how you first became involved in blended learning?
5. How would you describe the extent of your current use of blended learning?

Leadership Experience in Practice (8–10 minutes)

6. Can you share an example of a time when you influenced colleagues in using blended learning?
7. When you influenced others, what did that usually look like in practice (for example, mentoring, modeling, sharing resources, or problem-solving)?

Transition to Conditions

Before we move on, when I refer to “conditions” in the next set of questions, you may find it helpful to think in terms of situations or circumstances in different areas of your life, such as your personal life, your home, your workplace or unit, your university, and even the larger community. Any of these conditions may have supported or made it more difficult for you to lead informally in blended learning.

Supporting Conditions (12–15 minutes)

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8. What factors or conditions in your personal life, home, workplace, university, or larger community have supported your informal leadership in blended learning? Please explain your answer.
9. Which of these supports mattered most to you at that time, and why?
10. Based on your experience, what kinds of support from The University System would best help faculty who are trying to take on informal leadership roles in blended learning? Please explain your answer.

Hindering Conditions (12–15 minutes)

11. What factors or conditions in your personal life, home, workplace, university, or larger community have made it difficult for you to become an informal leader in blended learning? Please explain your answer.
12. Which of these hindering conditions had the strongest effect on your ability to lead informally, and why?
13. Based on your experience, what measures or actions from The University System would best help address the hindering conditions that make it difficult for faculty to take on informal leadership roles in blended learning? Please explain your answer.

Follow-up Questions (12–15 minutes)

14. Was there ever a time when a particular condition affected your ability or confidence to lead informally in blended learning, for better or for worse? What condition contributed to that change?
15. How have current conditions shaped the development of your informal leadership in blended learning over time?
16. How do current conditions influence whether you would consider taking on a more formal leadership role in blended learning in the future?
17. Are there any conditions related to training, time, resources, or support that affect your effectiveness as an informal leader in blended learning? If so, how?

Closing (3–5 minutes)

18. Is there anything else about your experiences with blended learning or informal leadership that you would like to share?

Appendix K: Maximum Variation Sampling Grid**Table 8***Maximum Variation Sampling Grid for Study Participants*

ID	Autonomous University	Academic Rank	Broad Academic Field	Years in BL Practice	Self-described Extent of BL Involvement
P01	University F	Assistant Professor	Education	7+	High
P02	University C	Assistant Professor	Social Sciences	4-6	High
P03	University B	Assistant Professor	STEM and Applied Sciences	4-6	High
P04	University C	Assistant Professor	Social Sciences	High	High
P05	University D	Assistant Professor	Health Sciences	4-6	High
P06	University E	Assistant Professor	STEM and Applied Sciences	7+	High
P07	University A	Assistant Professor	Arts and Humanities	4-6	Mod
P08	University A	Assistant Professor	Arts and Humanities	7+	Mod
P09	University A	Instructor	Arts and Humanities	4-6	Mod
P10	University A	Instructor	Arts and Humanities	4-6	Mod
P11	University D	Associate Professor	Social Sciences	7+	High
P12	University E	Senior Lecturer	STEM and Applied Sciences	1-3	Mod
P13	University E	Professor	STEM and Applied Sciences	4-6	High
P14	University C	Assistant Professor	STEM and Applied Sciences	7+	High
P15	University C	Associate Professor	STEM and Applied Sciences	4-6	High
P16	University E	Assistant Professor	Education	7+	High
P17	University D	Associate Professor	Health Sciences	7+	High
P18	University D	Associate Professor	Health Sciences	4-6	Mod
P19	University E	Professor	Education	7+	High

Note: BL – Blended Learning

Appendix L: Analytic Process Audit Trail

This appendix documents how the analytic process moved from coding to the development of interpretive insights. It provides evidence of analytic decisions across pattern generation, testing, refinement, and clustering.

A. Code-to-Pattern Generation and Resulting Pattern Statements

This section presents the code-to-pattern generation process for the initial analytic batch of participants (P01–P05). Patterns were developed through iterative comparison of in vivo and process codes across cases. Within this batch, Participants 01, 02, and 05 generated distinct pattern statements, while data from Participants 03 and 04 were examined and found to align with existing patterns without producing additional pattern statements. During the pattern development process, an initial set of 29 pattern statements was generated. As analysis progressed, Patterns 7 and 22 were found to represent closely related aspects of the same underlying observation and were subsequently merged. This resulted in a final set of 28 analytic pattern statements that were carried forward into pattern testing and refinement.

Table 9

Complete Code-to-Pattern Generation for Participant 01

In Vivo Codes	Process Codes	Pattern Statement
“I was there as an ate” “I wasn’t really there to become their leader” “I was just trying to help them”	downplaying leadership role framing influence as helping mentoring informally modeling practice providing constant support	1. Participants often describe what they do as just helping rather than leading.
“results matter” “students will market for you” “staff will market it for you” “word of mouth”	attributing influence on outcomes converting results into credibility diffusing influence through results gaining legitimacy indirectly	2. Participants link their influence to results rather than to themselves.
“I didn’t know what to do” “how do you address this kind of problem inside the classroom?” “it started with telling them how to create solutions” “because it works with my students”	adapting to constraints solving classroom problems experimenting with tools experimenting with methods developing practices through trial	3. Leadership seems to develop out of solving classroom problems.

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In Vivo Codes	Process Codes	Pattern Statement
“I give them all of my syllabus” “I give them all of the books that I have” “sort of technical assistance” “walking your talk”	sharing resources freely modeling practice demonstrating teaching methods	4. Influence happens when participants show and share what they do.
“they ask me questions and then ask me more questions” “they were asking me everything every day” “later on they formulate their own methods”	responding to repeated requests supporting colleagues iteratively co-developing practice over time providing constant support	5. Colleagues keep coming back with more questions after seeing something work.
“younger individuals started looking at my work” “they mimic what I do” “they were imitating me” “teachers from other campuses joined”	diffusing practice among peers spreading influence laterally peer uptake of practices gaining legitimacy indirectly	6. Practices spread through peers picking things up.
“I moved it to 50-50” “intermediate blended” “I use it on all my courses” “don’t use blended learning for emergency”	expanding blended learning use integrating blended learning intentionally normalizing blended learning practice	7. Blended learning moves from temporary use to something more planned. (later merged with 22)
“that’s how useful it is” “results are what she’s looking for” “students were happy” “when they found out how good I am”	demonstrating usefulness building credibility through outcomes earning recognition through performance building credibility gradually	8. Colleagues trust the approach when they see that it works.
“Older individuals trust me now” “they ask me questions and then ask me more questions” “students will market for you”	gaining recognition through trust being sought out for advice spreading reputation through word of mouth	9. Being asked again by colleagues signals recognition.
“Age is a factor... in Philippine society, we still value age. We don't value experience and self-learning.” “Age is a factor in terms of Philippine respect. “in an academic world where ranking is very important.	being constrained by hierarchy being marginalized by hierarchy navigating age-based authority negotiating legitimacy barriers	10. Rank and age shape whether others take you seriously.
“it was informal... it was small talks” “more of a friendly mentoring” “I was there as an ate (older sister)”	drawing on relational networks leveraging informal communities working through peer relationships being granted autonomy	11. Informal spaces make it easier to connect and share.

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In Vivo Codes	Process Codes	Pattern Statement
“not credited to me” “I feel like a ghost” “you don’t have a position” “ideas are not voiced out”	losing credit for contributions experiencing invisibility lacking formal authority being emotionally depleted	12. That same informality also limits authority and recognition.
“a certain freedom to do things” “they allowed me” “trusted the things that I did”	being granted autonomy receiving informal permission acting without formal directives	13. Support shows up as freedom to act, not direction.
“I would like to support (from) the sidelines” “I don’t enjoy positions” “I just enjoy teaching” “I was not there to become their leader” “more of a friendly mentoring” “I was just helping”	receiving institutional recognition gaining confidence from support scaling initiatives after validation	14. Moments of recognition seem to expand what people can do.
“if given all of the resources” “having a budget is acknowledgement” “having funding matters” “resources will allow me to decide” “my workload is hard” “I have eight preparations”	preferring non-positional roles resisting positional authority avoiding formal leadership posts prioritizing teaching over administration	15. Formal roles are not actively sought and often avoided.
“I trained them day and night” “I never said no to anyone who asked” “technical assistance like a call center”	linking leadership to resources evaluating role based on support conditioning leadership on institutional backing	16. Taking on roles depends on support and workload, not interest alone.
“bureaucracy” “ideas are not voiced” “department is very bureaucratic” “you get pushback”	supporting colleagues continuously sharing expertise generously contributing through service	17. Leadership shows up through helping and supporting others.
“Students and staff became my marketing” “teachers later on adopted my methods” “people associate the technology with me” “only those who understand your work will credit you” “not credited to me” “credited to somebody else” “Acknowledge your teachers and the things that they do!” “Have appreciation letters... those that the department	navigating institutional barriers being constrained by bureaucracy encountering structural obstacles	18. Barriers are tied to how the system is structured.

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In Vivo Codes	Process Codes	Pattern Statement
individuals can see, not necessarily social media”		
“informal leaders not yet recognized” “technical offices should not be led by teachers” “teachers need acknowledgement” “we are surviving because of the faculty” “nothing is done at the college itself” “you had to do it yourself”	earning legitimacy locally building reputation through networks gaining informal recognition	19. Recognition builds locally but does not always carry institutionally.
“I would like to support (from) the sidelines” “I don’t enjoy positions” “I just enjoy teaching” “I was not there to become their leader” “more of a friendly mentoring” “I was just helping”	identifying institutional gaps calling for structural support advocating support systems	20. Informal leadership work seems necessary, but is not fully supported by the system.

Note. In vivo codes are presented verbatim from participant transcripts. Process codes represent first-cycle coding interpretations. Pattern statements reflect initial analytic pattern construction prior to clustering and refinement.

Table 10

Complete Code-to-Pattern Generation for Participant 02

In Vivo Codes	Process Codes	Pattern Statement
“everything really started from the remote learning” “during the pandemic, we shifted to remote learning” “[The University System] actually released a memo” “synchronous only comes when there is... suspension of classes”	complying with a memo using online as contingency mode adapting to constraints	21. Blended learning begins as a response to disruption, not as a pedagogical approach.
“more on the asynchronous” “plan out how many meetings... face-to-face”	front-loading planning building contingency pathways	22. Blended learning is used depending on the situation.
“the synchronous part only comes when... unable to do face-to-face” “if you want to go full face-to-	using modalities depending on situations	(later merged with 7)

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In Vivo Codes	Process Codes	Pattern Statement
face, then you can do full face-to-face”		
“you need to plan ahead” “plan out everything... what you will present... what tools” “online... it has to be planned... you have to be ready” “how many meetings... face-to-face”	structuring delivery systems planning instructional infrastructure organizing LMS use	23. Blended learning is treated as a way of organizing teaching.
“there’s a memorandum” “[The University System] actually released a memo” “the influence comes from the issuance of the memo” “I’m just practicing what is...”	locating legitimacy in policy attributing authority upward complying with formal guidelines	24. Authority comes from policy rather than peers.
“it’s up to the faculty now” “whether or not they would be implementing the blended mode” “I don’t think I use influence” “I cannot actually personally see if I have influence”	depending on colleague receptivity lacking enforcement mechanisms engaging is non-obligatory	25. Whether others engage is up to them.
“it’s actually hard to do blended learning... you need tools... expertise... skills” “support will only come if you have the proper tools... guidelines” “at least 50% should be blended” “there’s no policy, there’s no guidelines” “nothing is done in the college itself... it’s the faculty personally who’s doing it”	experiencing policy-practice misalignment lacking implementation support experiencing structural strain	26. Policy pushes practice without enough support behind it.
“it seems to be actually shifting back to traditional mode again” “shifts really to more on face-to-face” “blended learning is more on	reverting to routine practices treating BL as fallback normalizing post-emergency patterns	27. Early use of blended learning settles into routine or falls back to traditional face-to-face instruction.
contingency” “it stopped there”		
“Nothing is done at the college itself, but it’s the faculty, it’s the faculty personally who’s doing it...”	identifying institutional gaps self-solving systemic deficiencies compensating for lack of support	28. Blended learning exposes institutional gaps that faculty work around.

INFORMAL FACULTY LEADERSHIP IN BLENDED LEARNING

In Vivo Codes	Process Codes	Pattern Statement
“because he or she thinks that he needs these tools so that he or she can properly do the online instruction.” “lack of the training, not the technology” “you had to do it yourself” “I had to do my own research” “we do not even know how to make the alignment”		

Note. In vivo codes are presented verbatim from participant transcripts. Process codes represent first-cycle coding interpretations. Pattern statements reflect initial analytic pattern construction prior to clustering and refinement.

Table 11

Complete Code-to-Pattern Generation for Participant 05

In Vivo Codes	Process Codes	Pattern Statement
“You know what, I’ll just do it” “when I do it... I’ll share” “there is a gap... I try to fill those gaps” “I am not a person who pushes their will on other people” “they kind of know me now as the technical support guy” “if there is an online exam, I’ll be the one to make it”	acting without claiming leadership initiating action in response to gaps prioritizing task completion over role definition sharing after doing, not before directing avoiding imposition while contributing expertise responding to immediate needs rather than following a planned approach	29. Blended learning work is taken up as needed, then shared, without framing it as leadership.

Note. In vivo codes are presented verbatim from participant transcripts. Process codes represent first-cycle coding interpretations. Pattern statements reflect initial analytic pattern construction prior to clustering and refinement.

B. Pattern Survival Testing

Pattern survival testing was conducted across the second group of participants' accounts (P06, P11–P15). This analysis examined whether patterns identified in the initial batch recurred, shifted, or no longer applied across subsequent cases. Patterns were evaluated in terms of recurrence, strain, or disappearance to assess how they held under variation and across differing institutional contexts.

Table 12

Pattern Survival Testing Across Participants P06, P11–P15

Pattern	Recurred	Strained	Disappeared
1. Leadership is disclaimed or minimized, even when influence is evident	P11, P12, P15	P06	P14
2. Influence is displaced away from the self (to policy, tools, or outcomes)	P06, P11, P13, P15; P12	P14	-
3. Leadership is framed as a by-product of problem-solving, not identity	P06, P15	P11	P12
4. Influence is enacted through showing, demonstrating, or sharing artifacts	P06, P13, P14, P15	P11	P12
5. Influence is iterative and responsive, emerging after repeated requests	P06, P11, P15	P14	P12
6. Influence travels laterally through peers, not vertically through authority	P06, P11, P15	P13, P14	P12
7. Over time, blended learning transitions toward planned integration or situational use.	Planned: P16, P19, P20; Situational: P17, P18	-	-
8. Legitimacy is built through demonstrated usefulness, when something tangibly works for others.	P06, P13, P15	P14	P12
9. Peer recognition and being asked again functions as a key legitimacy signal.	P06, P11, P15	P14	P12, P13
10. Formal rank and age hierarchies constrain legitimacy, especially for younger or junior faculty.	P12	P11	P06, P15
11. Informality enables flexibility, approachability, and peer-to-peer exchange.	P06, P11, P15	P14	P12
12. The same informality also limits authority, credit, and permission to intervene beyond one's lane.	P11, P14, P15	P06	P12
13. Enabling conditions are described as permission and freedom, not directive support.	P06, P11, P14	P15	P12

INFORMAL FACULTY LEADERSHIP IN BLENDED LEARNING

Pattern	Recurred	Strained	Disappeared
14. Moments of recognition (being thanked, asked, funded) function as turning points that amplify confidence and reach.	P06, P11, P15	P14	P12, P13
15. Formal leadership roles are approached with conditional reluctance, often tied to workload, caregiving, or lack of system readiness.	P06, P11, P13, P14, P15	-	P12
16. Willingness to assume formal roles is dependent on resources, load credit, or institutional recognition, not aspiration alone.	P06, P13, P14, P15	-	P11
17. Leadership is enacted through contribution rather than coordination.	P06, P11, P15	P13, P14	P12
18. Hindering conditions are structural.	P06, P11, P12, P13, P14, P15	-	-
19. Legitimacy is earned locally and pragmatically, but unevenly recognized institutionally.	P06, P11, P14, P15	-	P12
20. Informal leadership appears to be necessary, but is structurally unsupported.	P06, P11, P14, P15	P13	P12
21. Blended learning enters initially as a solution to constraints, not as a pedagogical ideology.	P12, P13, P14, P15	P06	P11
22. Blended learning is framed as infrastructure (e.g. planning, scheduling, systems, LMS), rather than as “innovation”.	P06, P12, P13, P15	P14	P11
23. Legitimacy is located upward in policy, guidelines, or formal issuances, rather than in interpersonal validation.	P12, P13	P14	P06, P11, P15
24. Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.	P11, P14, P15	P06	P12
25. Policy mandates without aligned conditions create strain.	P12, P13, P14, P15	-	P06
26. Emergency or early experimentation gives way to stabilization or routinization.	P06, P11, P13, P15	P14	P12
27. Blended learning reveals institutional gaps that invite informal problem-solving.	P06, P11, P12, P13, P14, P15	-	-
28. Leadership functions are enacted without naming a trajectory at all, simply doing the work that is needed.	P06, P15	P11	P12, P13, P14

C. Pattern Boundary Testing

Pattern boundary testing examined how patterns held across the final group of individual participants' accounts (Participants 16–20). This process focused on identifying where patterns continued to recur, where their meanings shifted, and where their limits became visible across cases. It supported clarifying the boundaries, stability, and explanatory value of patterns prior to the development of the final interpretive insights.

Table 13

Pattern Boundary Testing Across Participants P16–P20

Pattern	Recurred	Strained	Disappeared
1. Leadership is disclaimed or minimized, even when influence is evident.	P18, P19	P17	P16, P20
2. Influence is displaced away from the self (to policy, tools, or outcomes).	P18, P19	P17	P16, P20
3. Leadership is framed as a by-product of problem-solving, not identity.	P18, P19	P17	P16, P20
4. Influence is enacted through showing, demonstrating, or sharing artifacts.	P16, P17, P19	P20	P18
5. Influence is iterative and responsive, emerging after repeated requests.	P16, P17, P20	P19	P18
6. Influence travels laterally through peers, not vertically through authority.	-	P20	P17, P18, P19, P16
7. Over time, blended learning transitions toward planned integration or situational use.	Planned: P06, P11, P14, P15; Situational: P12, P13	-	-
8. Legitimacy is built through demonstrated usefulness, i.e. when something tangibly works for others.	P17, P18, P19, P20	P16	-
9. Peer recognition and being asked again functions as a key legitimacy signal.	P17, P20	P16	P18, P19
10. Formal rank and age hierarchies constrain legitimacy, especially for younger or junior faculty.	P16	P18	P17, P19, P20
11. Informality enables flexibility, approachability, and peer-to-peer exchange.	P17, P18, P19	P20	P16
12. The same informality also limits authority, credit, and permission to intervene beyond one's lane.	P18, P19	P17	P16, P20

INFORMAL FACULTY LEADERSHIP IN BLENDED LEARNING

Pattern	Recurred	Strained	Disappeared
13. Enabling conditions are described as permission and freedom, not directive support.	P17, P19	P18	P16, P20
14. Moments of recognition (being thanked, asked, funded) function as turning points that amplify confidence and reach.	P17, P20	P16	P18, P19
15. Formal leadership roles are approached with conditional reluctance, often tied to workload, caregiving, or lack of system readiness.	P16, P17, P18, P19	-	P20
16. Willingness to assume formal roles is dependent on resources, load credit, or institutional recognition, not aspiration alone.	P16, P18, P19	P17	P20
17. Leadership is enacted through contribution rather than coordination.	P17, P18, P19	P20	P16
18. Hindering conditions are structural.	P16, P17, P18, P19, 20	-	-
19. Legitimacy is earned locally and pragmatically, but unevenly recognized institutionally.	P16, P17, P18, P19	-	P20
20. Informal leadership appears to be necessary, but is structurally unsupported.	P16, P18, P19	P17	P20
21. Blended learning enters initially as a solution to constraints, not as a pedagogical ideology.	P17, P18, P19	P20	P16
22. Blended learning is framed as infrastructure (e.g. planning, scheduling, systems, LMS), rather than as “innovation”.	P16, P17, P19, P20	-	P18
23. Legitimacy is located upward in policy, guidelines, or formal issuances, rather than in interpersonal validation.	P16, P20	P19	P17, P18
24. Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.	P17, P18, P19	P20	P16
25. Policy mandates without aligned conditions create strain.	P16, P18, P19	P17	P20
26. Emergency or early experimentation gives way to stabilization or routinization.	P17, P19, P20	P16	P18
27. Blended learning reveals institutional gaps that invite informal problem-solving.	P16, P17, P18, P19, 20	-	-
28. Leadership functions are enacted without naming a trajectory at all, simply doing the work that is needed.	P18, P19	P17	P16, P20

D. Focus Group Alignment with Identified Patterns

Patterns developed through cross-case analysis of individual interviews were examined in relation to the focus group discussion (Participants 07–10). The focus group largely reinforced the identified patterns, particularly those related to informal enactment, structural constraints, and institutional misalignment, while adding collective depth and contextual detail.

Table 1

Focus Group Alignment with Identified Patterns

Pattern	Focus Group Alignment
1. Leadership is disclaimed or minimized, even when influence is evident.	✓
2. Influence is displaced away from the self (to policy, tools, or outcomes).	✓
3. Leadership is framed as a by-product of problem-solving, not identity.	✓
4. Influence is enacted through modeling, illustrating, or sharing artifacts.	✓
5. Influence is iterative and responsive, emerging after repeated requests.	✓
6. Influence travels laterally through peers, not vertically through authority.	✓
7. Over time, blended learning transitions toward planned integration or situational use.	✓
8. Legitimacy is built through observable usefulness, when something tangibly works for others.	✓
9. Peer recognition and being asked again functions as a key legitimacy signal.	✓
10. Formal rank and age hierarchies constrain legitimacy, especially for younger or junior faculty.	✓
11. Informality enables flexibility, approachability, and peer-to-peer exchange.	✓
12. The same informality also limits authority, credit, and permission to intervene beyond one's lane.	✓
13. Enabling conditions are described as permission and freedom, not directive support.	✓
14. Moments of recognition (being thanked, asked, funded) function as turning points that amplify confidence and reach.	✓
15. Formal leadership roles are approached with conditional reluctance, often tied to workload, caregiving, or lack of system readiness.	✓
16. Willingness to assume formal roles is dependent on resources, load credit, or institutional recognition, not aspiration alone.	✓
17. Leadership is enacted through contribution rather than coordination.	✓

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Pattern	Focus Group Alignment
18. Hindering conditions are structural.	✓
19. Legitimacy is earned locally and pragmatically, but unevenly recognized institutionally.	✓
20. Informal leadership appears to be necessary, but is structurally unsupported.	✓
21. Blended learning enters initially as a solution to constraints, not as a pedagogical ideology.	✓
22. Blended learning is framed as infrastructure (e.g., planning, scheduling, systems, LMS), rather than as innovation.	✓
23. Legitimacy is located upward in policy, guidelines, or formal issuances, rather than in interpersonal validation.	✓
24. Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.	✓
25. Policy mandates without aligned conditions create strain.	✓
26. Emergency or early experimentation gives way to stabilization or routinization.	✓
27. Blended learning indicates institutional gaps that invite informal problem-solving.	✓
28. Leadership functions are enacted without naming a trajectory at all, simply doing the work that is needed.	✓

Note. ✓ = Clearly evident in focus group discussion.

E. Analytic Pruning

Analytic pruning involved reviewing the pattern statements to determine which warranted further development and which overlapped or remained primarily descriptive. Patterns were retained, folded into broader constructions, or set aside to support clearer conceptual boundaries and avoid duplication. This step supported refining the pattern set toward analytically distinct and meaningful patterns.

Table 15

Analytic Pruning Decisions

Pattern	Decision	Analytic Rationale
1. Leadership is disclaimed or minimized, even when influence is evident.	FOLD	Functions as a recurring feature of informality and supports stronger patterns on informality, legitimacy, and enactment.
2. Influence is displaced away from the self (to policy, tools, or outcomes).	FOLD	Describes how influence is enacted and framed within enactment and legitimacy rather than as a standalone pattern.
3. Leadership is framed as a by-product of problem-solving, not identity.	KEEP	Strong explanatory power; clarifies leadership as practice rather than identity.
4. Influence is enacted through showing, demonstrating, or sharing artifacts.	KEEP	Strong recurrence and explanatory value; specifies enactment.
5. Influence is iterative and responsive, emerging after repeated requests.	FOLD	Acts as evidence of legitimacy and enactment rather than a separate pattern.
6. Influence travels laterally through peers, not vertically through authority.	KEEP	Explains key distinction from formal leadership.
7. Over time, blended learning transitions toward planned integration or situational use.	FOLD	Functions as a variation rather than a core pattern.
8. Legitimacy is built through demonstrated usefulness, when something tangibly works for others.	KEEP	High recurrence; explains how influence travels.
9. Peer recognition and being asked again functions as a key legitimacy signal.	FOLD	Overlaps with legitimacy patterns.
10. Formal rank and age hierarchies constrain legitimacy, especially for younger or junior faculty.	KEEP	Explains uneven legitimacy and influence.
11. Informality enables flexibility, approachability, and peer-to-peer exchange.	KEEP	Key insight explaining how leadership occurs without title.

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Pattern	Decision	Analytic Rationale
12. The same informality also limits authority, credit, and permission to intervene beyond one's lane.	KEEP	Balances Pattern 11; grounds informality.
13. Enabling conditions are described as permission and freedom, not directive support.	FOLD	Represents a subtype within broader conditions.
14. Moments of recognition (being thanked, asked, funded) function as turning points that amplify confidence and reach.	PARK	Supports legitimacy but not a primary pattern.
15. Formal leadership roles are approached with conditional reluctance, often tied to workload, caregiving, or lack of system readiness.	KEEP	Explains positioning relative to formal roles.
16. Willingness to assume formal roles is dependent on resources, load credit, or institutional recognition, not aspiration alone.	KEEP	Explains conditional logic of role uptake.
17. Leadership is enacted through contribution rather than coordination.	KEEP	Core analytic statement linking enactment, legitimacy, and informality.
18. Hindering conditions are structural.	KEEP	Strong recurrence and explanatory power.
19. Legitimacy is earned locally and pragmatically, but unevenly recognized institutionally.	FOLD	Overlaps with legitimacy and conditions patterns.
20. Informal leadership appears to be necessary, but is structurally unsupported.	KEEP	Integrates conditions and fragility of influence.
21. Blended learning enters initially as a solution to constraints, not as a pedagogical ideology.	KEEP	Central to case logic; explains pragmatic leadership.
22. Blended learning is framed as infrastructure (e.g., planning, scheduling, systems, LMS), rather than as innovation.	KEEP	Reframes BL as infrastructure; supports operational view.
23. Legitimacy is located upward in policy, guidelines, or formal issuances, rather than in interpersonal validation.	FOLD	Subtype of legitimacy.
24. Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.	KEEP	Explains fragility and limits of influence.
25. Policy mandates without aligned conditions create strain.	KEEP	Explains institutional contradictions.
26. Emergency or early experimentation gives way to stabilization or routinization.	FOLD	Subsumed under infrastructure and conditions.
27. Blended learning reveals institutional gaps that invite informal problem-solving.	KEEP	Strong explanatory power; links BL, conditions, leadership.
28. Leadership functions are enacted without naming a trajectory at all, simply doing the work that is needed.	PARK	Contextual observation rather than primary pattern.

Note. KEEP = retained as final insight-bearing pattern; FOLD = merged into broader pattern; PARK = retained as contextual/supporting evidence. Pruning Summary: KEEP = 17 patterns; FOLD = 9 patterns; PARK = 2 patterns.

F. Pattern Clustering

Following pruning, the 17 retained patterns were examined in relation to one another to identify how they worked together analytically. Clustering focused on how patterns contributed to explaining the phenomenon. Each cluster was reviewed for coherence and boundary clarity through brief analytic definitions to ensure it remained distinct. The process resulted in four analytic clusters: enactment, mechanics of influence, conditions shaping practice, and outcomes of these conditions. These clusters informed the development and naming of the final interpretive insights presented in Chapter 4.

Table 16

Pattern Clustering

Cluster	Concise Description	Patterns Included
Enactment	Leadership is enacted through contribution and problem-solving rather than role authority	3. Leadership is framed as a by-product of problem-solving, not identity. 4. Influence is enacted through modeling, illustrating, or sharing artifacts. 17. Leadership is enacted through contribution rather than coordination.
Mechanics of Influence	Influence operates through peer networks and depends on legitimacy, receptivity, and consent.	6. Influence travels laterally through peers, not vertically through authority. 8. Legitimacy is built through observable usefulness, when something tangibly works for others. 10. Formal rank and age hierarchies constrain legitimacy, especially for younger or junior faculty. 11. Informality enables flexibility, approachability, and peer-to-peer exchange. 12. The same informality also limits authority, credit, and permission to intervene beyond one's lane. 24. Informal leadership often depends on receptivity, not obligation; colleagues can ignore suggestions without consequence.
Conditions	Blended learning is experienced as infrastructure under constraint, exposing institutional gaps.	21. Blended learning enters initially as a solution to constraints, not as a pedagogical ideology. 22. Blended learning is framed as infrastructure (e.g., planning, scheduling, systems, LMS), rather than as innovation. 27. Blended learning indicates institutional gaps that invite informal problem-solving.
Outcomes	Structural conditions and institutional misalignment shape	15. Formal leadership roles are approached with conditional reluctance, often tied to workload, caregiving, or lack of system readiness.

INFORMAL FACULTY LEADERSHIP IN BLENDED LEARNING

Cluster	Concise Description	Patterns Included
	outcomes and participants' stance toward formal roles.	16. Willingness to assume formal roles is dependent on resources, load credit, or institutional recognition, not aspiration alone. 18. Hindering conditions are structural. 20. Informal leadership appears to be necessary, but is structurally unsupported. 25. Policy mandates without aligned conditions create strain.

Table 17

Cluster Validation and Naming of Final Interpretive Insights

Cluster	Definition	Final Interpretive Insight
Enactment	Leadership is enacted through contribution and problem-solving rather than role authority	Informal Leadership as Contribution-Oriented Practice
Mechanics	Influence operates through peer networks and depends on legitimacy, receptivity, and consent.	Legitimacy and Consent in Informal Influence
Conditions	Blended learning is experienced as infrastructure under constraint, exposing institutional gaps.	Blended Learning as Institutional Infrastructure Under Constraint
Outcomes	Structural conditions and institutional misalignment shape outcomes and participants' stance toward formal leadership.	Informal Leadership as a Response to Institutional Misalignment