McClusky's Theory of Margin: A Constructivist Grounded Theory Review for the 21st Century

Garrett K. Hogan
Kansas State University

Abstract: In 1963, Howard Y. McClusky wrote the theory of margin, defining the personal ratio of power to load. Margin theory has been used to predict success; however, more research is needed to redevelop how this sixty-year-old theory is situated in the current environment. This grounded theory study examined the changes to margin by hybridization. Initial findings suggest that tasking is not the simple internal review of power and load, as suggested in the theory of margin. Instead, the hybridized environment adds additional factors of intensification and motivation drain brought on by omnipresent tasking and dynamic environments. These factors combine to create an additional environment-based term to the decades-old, one-dimensional theory.

Keywords: margin, load, power, intensification, multi-tasking, motivation

Academia has used McClusky's theory of margin (Lorge et al., 1963) as a predictor of success since its publication in 1963. However, no change to the fundamental theory has been evident in a literature review since publication. While hybrid learning through correspondence courses existed in the time of McClusky, the COVID-19 pandemic forced a shift to online learning (Tritsch, 2021) that provided a challenge to margin theory not envisioned by McClusky. Exploration of the influence of technology on the experience of margin by an educator provides an avenue for inquiry that this study hopes to begin. As presented by Larson (1980), the theory of intensification is a point of entry for a discussion on load, while Vroom's (1964) theory of motivation is a point of entry for a discussion on power. Understanding the impacts on power and load allows for organizing the participants' experiences in a method that allows for redeveloping the theory of margin.

During the literature review on the topic of perceived load in the workplace, Larson's (1980) treatise on labor intensification stood apart in providing a lens for understanding load modification. Larson defines intensification as the increase in tasking with a corresponding decrease in task complexity. Larson presented the problem statement that intensification is an almost inevitable result of the streamlining of worker functions while simultaneously lamenting that the streamlining "elevates his or her specialized skills at the time it narrows the sphere of work and increases dependence on the bureaucratic whole" (Larson, 1980, p. 163). Larson discussed this topic through the lens of manufacturing, relating intensification to assembly line production. In this construct, Larson (1980) noted that higher-level workers—without the controlling functions of time clocks and union-mandated breaks—were subjected to an increased volume of work that "fills the pores" (Larson, 1980, p. 163) of the day. Fundamentally, the intensification process was "one of the most tangible ways in which the work privileges of educated workers are eroded" (Larson, 1980, p. 166). Larson (1980) referred to the standard professional privileges training, experimentation, and researching new techniques. Apple (1986) translated intensification into education, where teachers faced similar issues in the mid-eighties. Brookfield (2017) continues to chronicle hybrid challenges in his works.

McClusky (Lorge et al., 1963) defined power in his margin theory as consisting of a web of interacting factors: physical, social, mental, and economic all come together to determine the factors of power. According to McClusky's theory, for a person to feel appropriately occupied, their load-to-power margin should be 50% to 80%. Margin Theory further states that above 80% will lead to feelings of exhaustion, while lower than 50% will lead to feelings of boredom. It is possible to link motivation theory to McClusky's concept of power. Vroom's (1964) Theory of Motivation provided a research benchmark for the generation of power in an educator by applying expectancy, instrumentality, and valence. Expectancy focuses on the individual's expectation of output related to the effort expended. Instrumentality reflects the value of the work an individual accomplishes by the individual. Valence focuses on the expectation of outsiders' recognition and validation of the work.

While there have been many changes to the educational landscape since 1963, it can be argued that the COVID-19 pandemic generated the most significant demand signal for change. Forced lockdowns, quarantines, and isolation effects that lasted for years required education to rapidly adopt extensive modality changes that would not have been considered before the pandemic (Carroll, 2021). Each tool requires training and learning its applications before educators use it. Significant changes to pedagogy and modality influenced educators' stress levels (Johnson & Maclean, 2008). The new tasks associated with multi-modal instruction required a host of new mundane skills—logins, video set up, camera and microphone maintenance—while viral containment reduced an educator's exposure to their prime motivator—contact with students.

This study aimed to redevelop margin by investigating the changes teachers faced through their first-person experiences. To set the frame of reference for the research study, the following terms require operationalization as their use is specific to this research study.

Load – The combination of internal and external factors involved with the usual requirements of living and social, civic, and work obligations (Lorge et al., 1963)

Power – The participant's internal perception of ability (Lorge et al., 1963)
Intensification – An increase in the number of tasks with a corresponding decrease in task complexity (Larson, 1980).

Hybrid Environment (hybridization) – A hybrid environment is any variant of educational experience that is not 100% traditional in-person, synchronous modality.

Background

Little study has been done on the interaction between margin and the environment. Instead, most studies focus on the interaction between the remaining margin and the prospect of success. Chronologically, Main (1979) conducted the first investigation of margin and stated that the power-load theory had yet to be integrated into any comprehensive teaching model. Most significant to this investigation was Main's (1979) comment that "The key to the concept of margin lies not only in the sub-concepts of load and power but even more in the relationships that exist between them" (p. 24).

Weiman (1987) was the first to bring the environment into the discussion through the exploration of external social and economic factors that impact academic performance. In this quantitative study of 28 participants, Weiman (1987) found no significant correlation between margin in life and social or economic load indicators. Weiman (1987) recommended developing better tools to determine if there is a relationship between margin and performance. By 1993, Hiemstra designated the margin theory as an underdeveloped model for adult learning, pointing out that if an instructor is not aware of this theory, they may generate an excessive load on a student. Hiemstra's (1993) association of performance with margin inspired two dissertations on the topic of margin equals success (Thul-Sigler, 2016; Trautman, 2004). These three works start to reflect the concept of intensification of the student's environment.

Maxfield (2009) shifted the research focus to qualitative methods and the asynchronous learning experience of non-traditional students and identified a theme of a need for flexible learning, marking the first indication of hybrid learning. What follows, in the literature, is a gap until 2021. In 2021, Biney evaluated the impact of margin on remote learners in Ghana as they balance the external needs of maintaining and keeping homes, playing leadership roles, and the demands of the workplace with the school's requirements. Biney (2021) also pointed to the impact of the COVID-19 pandemic as a catalyst for increased digital access. Though more than a decade apart, Biney's (2021) and Maxfield's (2009) research provides fertile grounds for redeveloping McClusky's margin theory in the modern digital environment.

Research Design and Data Analysis

The following questions bound the research study: How do adult learners compensate for lack of margin in a demanding work environment? How does technology influence the ability to multi-task effectively? What is the participants' state of well-being when they are using technology to multi-task?

This study used constructivist epistemology and grounded theory methodology to serve the research purpose and questions. Grounded theory provides a framework to define a new idea from participant experiences by constantly comparing all responses to each other until the data returns no new themes, thus reaching saturation. (Charmaz, 2017; Corbin & Strauss, 2008; Glaser & Strauss, 1967; Levitt, 2021). In-vivo coding methods were selected to process the data to maintain the participant's voice, limit researcher subjectivity, and achieve the "detailed descriptions and explanations of lived experiences that are intended to be applied within a certain context" (Leavitt, 2021, p. 6).

The researcher selected an anonymous, web-based, short-answer format as the data collection vehicle for this study. Through deployment on Reddit and Facebook education forums by the moderators, any members of those forums had access to the survey; only the researcher had access to responses. A valid participant for the study required some formal teaching experience before 2019 and after 2021. One participant had no teaching experience in the timeframe targeted, which resulted in removal from the response pool. There was no pre-screening of participants. The researcher had no connection or personal knowledge of the specific backgrounds or demographics of the participants except for volunteered information in the personal responses. The researcher determined experience level and geographic location to be needed demographics for the purpose of diversity and collected this data as part of the survey.

The anonymous nature through which participants are discovered limits researcher subjectivity while maximizing the freedom to respond for the participants. As this study requires educators to be vulnerable, allowing for a safe, non-judgmental, non-attributional space to

respond supports clear and distinct retellings of participants' experiences. These data were collected between June 2022 and June 2023. This study received Institutional Review Board approval, and informed consent was mandatory for all recorded responses.

Using iterative data collection and coding allowed me to clump the data in batches and utilize in-vivo coding to discover themes. To maintain consistency of evaluation between batches, I utilized metasynthesis analysis. Saldana (2021) points to metasynthesis as a method for comparing themes between separate bodies of data. For example, when initially deployed on Facebook, the data collection vehicle generated a spike in responses, followed by a decline in interest and a renewed spike about two months later. Coding each spike independently and then combining it in metasynthesis allowed each group to retain its themes while combining those themes in the search for saturation central to grounded theory. (Charmaz, 2017; Glaser, 2007).

The main limitation of the study was the small sample size. Only eight participants responded to the data collection vehicle. The lack of participants was likely due to the limited time available to accomplish the study during an academic semester and the lack of penetration into the social media platforms on which the data collection vehicle resided. Charmaz and Glaser (2017, 2007) require data saturation for a valid grounded theory; this pilot research study did not achieve saturation. If approved for continued development into a dissertation, the researcher will utilize a broader network of social media platforms and a longer data collection timeline to pursue saturation.

Findings

Initial coding produced four themes: load on the teacher (12 codes), implementation of technology (8 codes), multi-tasking required by the teacher (14 codes), and the feeling of power of the teacher (4 codes). Data collected and coded shows clear experiences related to intensification and motivational impacts. Exceptional responses for each theme are presented.

Theme of Load: "The need to learn new platforms, programs, and apps was overwhelming and caused much stress." Theme of Implementation: "It was completely impractical to expect teachers to just seamlessly go from teaching in the classroom to teaching kids at home with no support." Theme of multi-tasking: "Multi-tasking is teaching in general. Watching every kid, all the time, answering a billion questions a day, planning, prepping, filling out paperwork, and contacting parents." Theme of Power: "I had to give myself permission to be 'less than excellent' in my own eyes."

Upon review of the research questions, this research study was partially effective. On the topic of how do adult learners compensate for lack of margin in a demanding work environment? The participants reported that they just pushed through the problem by allowing a less-than-perfect performance or running at a higher margin utilization rate, which they described as excessive stress in line with the base theory (Lorge et al., 1963). On the topic of how technology influences the ability to multi-task effectively, participants reported the exact opposite, with the clearest example of the lack of ability to multi-task listed above. The last question, the participants' state of well-being when using technology to multi-task, was not clearly answered and requires additional study.

Discussion

The themes of load and power reflect that educators are experiencing an intensified environment typified by frustration with their operating environment and an acceptance that they cannot

interact with their students as directly and personally as they once did (Apple, 1986; Ballet & Kelchtermans, 2008; Larson, 1980; Vroom, 1964). The following points summarize McClusky's theory of margin remains an understudied topic. Weiman's (1987) lack of correlation between socioeconomic indicators and load point to broad applicability. Hiemstra (1993) identified that the topic requires more study, indicating a lack of holistic understanding. Maxfield (2009) points to the critical need for educational flexibility and the roots of hybridization. Finally, Biney (2021) discusses the difficulty in balancing the intensifying effect education can have as workers try to offset labor intensification by increasing education. The expression of load and power in a hybridized environment reported by the participants in this study provides a new insight into the redevelopment of margin in the twenty-first century. Work remains in this study to finalize redevelopment of margin.

   In a review of the dissertations that directly address McClusky's theory of margin, lateral literature reviews allowed the researcher to fill in gaps in understanding. In this lateral review of the core dissertations, the researcher discovered the theories of intensification and motivation. As the researcher reviewed the participants' stories, the theories of intensification and motivation began to align. During metasynthesis, individual batches of participants seemed to align with those without strong organizational support. Participants with strong organizational support showed lower intensification effects compared to their peers. This study found evidence to submit that a redeveloped version of McClusky's theory of margin should add a term describing the organization as it applied to a teacher's margin. The redeveloped theory of margin should be the traditional McClusky term of load divided by power with an additional term of intensification (organizational load) divided by motivation (organizational power). This term can be positive or negative, representing the organization's ability to add or subtract from a teacher's available margin.

Conclusion

Organizations need to understand that the minimum skill, repetitive tasks that epitomize intensification rob teachers of margin. For example, multiple steps by the teacher to set up the hybrid environment for teaching for every class session robs the teacher of teaching time and interaction time with the students. When deploying new technology, administrators should increase the integration of systems before launch and provide technical and administrative support to the teachers after launch. Focusing on motivation, the source of power for teachers, increasing efforts to build instrumentality, valence, and expectancy enriches motivation and rebuilds margin. An administration that was supportive and rewarding of innovation showed positive responses from participants who expressed higher levels of motivation and, therefore, higher available margin. The redeveloped second term of the margin can be positive or negative. The orientation of that mathematical value is up to the organization. Making the value positive by implementing intensification reduction and motivation improvement will generate a higher available margin for those that matter most—the students.

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