# Breaking the Mold on Blended Learning


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# Breaking the Mold on Blended Learning[1]

Blended learning is not new. Popularized in the late 1990s, blended learning was primarily delivered as online, e-learning modules, not necessarily integrated with a classroom experience. While it enjoyed some levels of success for lower levels of training and procedural learning, it was not embraced as a viable strategy for development at the executive level. It was believed that the nature of executive learning required dynamic, classroom interaction. Over the next twenty years, however, non-classroom activities were introduced into executive programs with greater frequency.

Today, there is increased interest in blended learning not just at lower levels of the organization, but in executive education as well. This increased interest is the result of a number of factors. First, the recent financial crisis has forced companies not only to scrutinize the costs of executive development but also the time that executives and upper management are away from the office. A second, and equally compelling factor, is the emphasis that chief learning officers are placing on the application of learning in the work environment. Providing a stellar classroom experience is no longer sufficient. Companies seek learning that is transferable to the workplace. Executives want to learn concepts and frameworks that can be put into practice and contribute to real solutions. Finally, the last few years have witnessed a proliferation and broad use of new communication and social media technologies. This confluence of economic pressures, solution-focused learning, and embracing of new technologies has prompted both companies and schools to revisit blended learning as an effective approach to learning at the executive level.

If blended learning is becoming an integral part of the executive education landscape, university-based executive education providers need to understand its potential and design new offerings to deliver on its promise. This research study set out to test the assumption that blended learning had, in fact, become part of the mainstream in executive education. The objectives of the study were to:

- present examples of how blended learning is being used effectively in university-based executive education
- offer useful frameworks to assist schools in designing blended learning programs

[1] This report was sponsored by the UNICON Research Committee and conducted by Marie Eiter, former executive director of executive education at MIT's Sloan School of Management and Toby Woll former director of executive education at MIT's Sloan School of Management. The authors can be reached at meiter@mit.edu and twoll@mit.edu

- identify the critical success factors and supporting systems that need to be in place for these new models to succeed.

Our definition of blended learning was broad and included any combination of traditional classroom instruction with non-classroom or non-traditional learning activities. During our research, other terms we heard used synonymously with blended learning were: hybrid learning, distributed learning, connected learning, and outside-inside learning.

## Research Methods

The authors conducted a survey of UNICON member schools on their current practices as they relate to blended learning. They also conducted in-depth telephone and face-to-face interviews with associate deans and directors of executive education, senior human resource executives, and senior consultants. In addition, they reviewed recent articles from publications such as *Chief Learning Officer*, *FT.com, Training & Development,* and *Workforce Management,* as well as published studies on the topic.

## UNICON Member Survey Responses

An invitation to participate in a brief web-based survey on blended learning was sent to all UNICON schools. The 45 schools that responded represented a diversity of program sizes and locations. [2]

Seventy-one percent of the responding schools reported using blended learning in both open and custom programs. In open programs, the blended learning elements offered most frequently were online communities and networks followed by web and/or mobile content delivery, action learning, and executive coaching/mentoring. (See Figure 1)

[2] 50% of the 45 respondents were from schools with annual revenues from non-degreed executive education of $7m or less, 33% had revenues between $8m and $29m, and 16% had revenues of $30m or higher. 49% of the respondents were from North American-based schools and 23% were located in Europe, 14% from Latin America, 12% Asia or Australia, and 2% Africa.

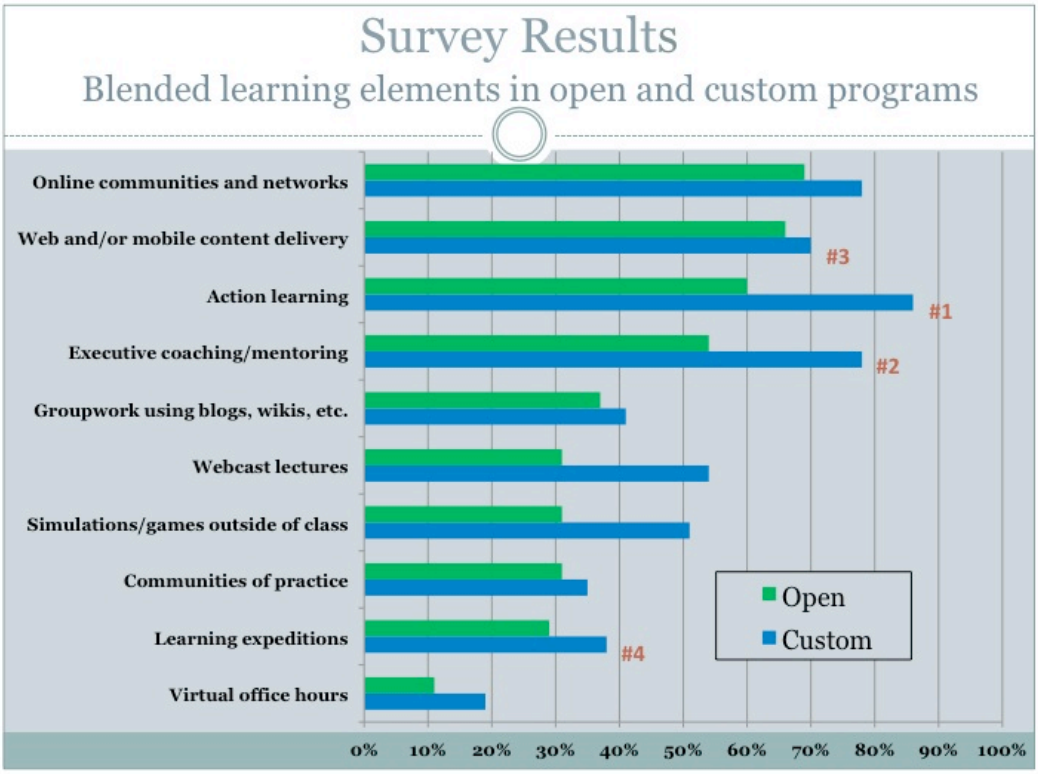


Figure 1

Blended learning elements in custom programs followed very much the same pattern. While blended learning elements used in custom programs were greater in scale than those used in open programs, the most frequently mentioned were the same four elements of online communities and networks, web and/or mobile content delivery, action learning, and executive coaching/mentoring. It is reasonable that action learning and executive coaching were more frequently cited in custom programs since these are very appropriate in custom engagements.

What was interesting was to overlay participant reactions to the blended learning elements offered by schools, as reported in the survey. The red numbers in Figure 1 indicate participant preferences among the blended learning elements listed. Participants have the most favorable reaction to action learning, noted by #1, executive coaching/mentoring, noted by # 2, followed by web and/or mobile content delivery. The 4$^{th}$ most popular element, learning expeditions, falls low on the scale of what is being offered. Schools might want to consider increasing this element in their programs. Conversely, online communities and networks, while being widely offered, were less popular with participants. It would be interesting to get more participant feedback and consider reducing the effort going into offering online communities and networks, if they continue to be unpopular.

## Technologies Used

Both from the survey and from our interviews, it was clear that schools are using an array of technologies. There are many education specific platforms being used. Frequently mentioned were Blackboard, a school's own proprietary technology, and WebCT. There appears to be a tendency for schools to use off-the-shelf products that are widely used in corporations. These are indicated by an * in Figure 2.

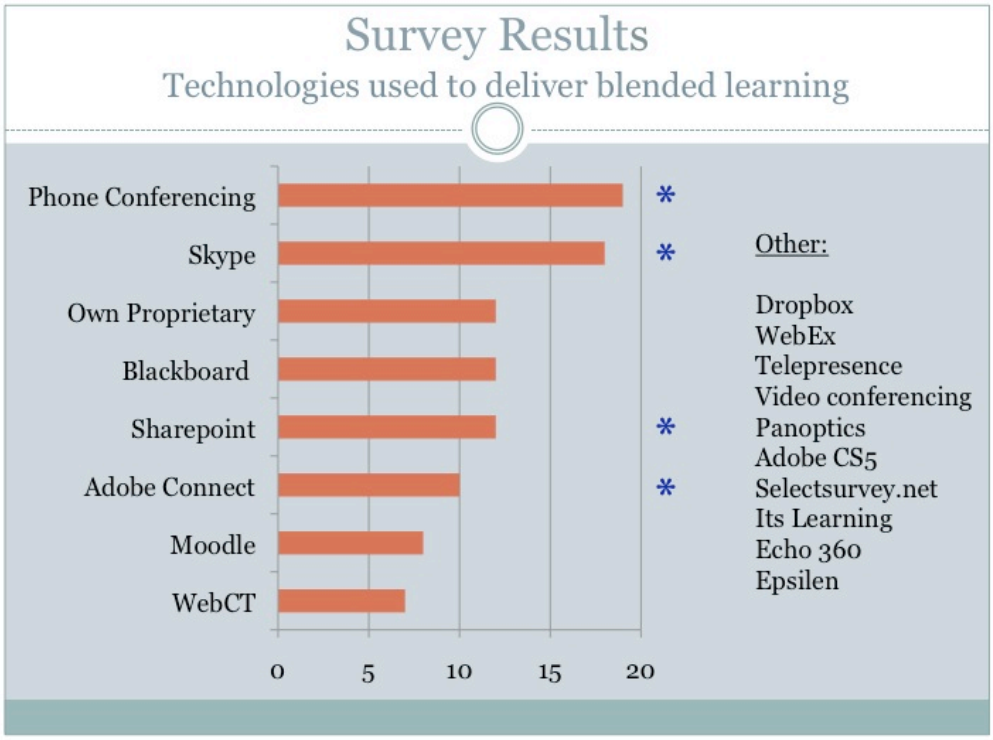


Figure 2

There is clearly not one preferred technology. However, all of our interviewees agreed that:

- Keeping it simpler is better (e.g. phone conferencing)
- Having IT support available to the executive education department is critical
- Providing on-the-ground and at-a-distance support is essential
- Getting good at providing support takes time. Sometimes the problems are at the school's end, but often they are conditions at the participants' end.

There is a steep learning curve when technologies are being launched, and it is really important to consider the technology a work-in-progress. All the interviewed schools said that they try a technology, get feedback, improve, and try again.

## Stages of Development

To get a sense of where schools are in the development of their blended learning programs, we asked the respondents to describe their stage as: responding to ad hoc requests, doing small experiments, productizing blended learning elements across programs, or building blended learning into their strategic plan.

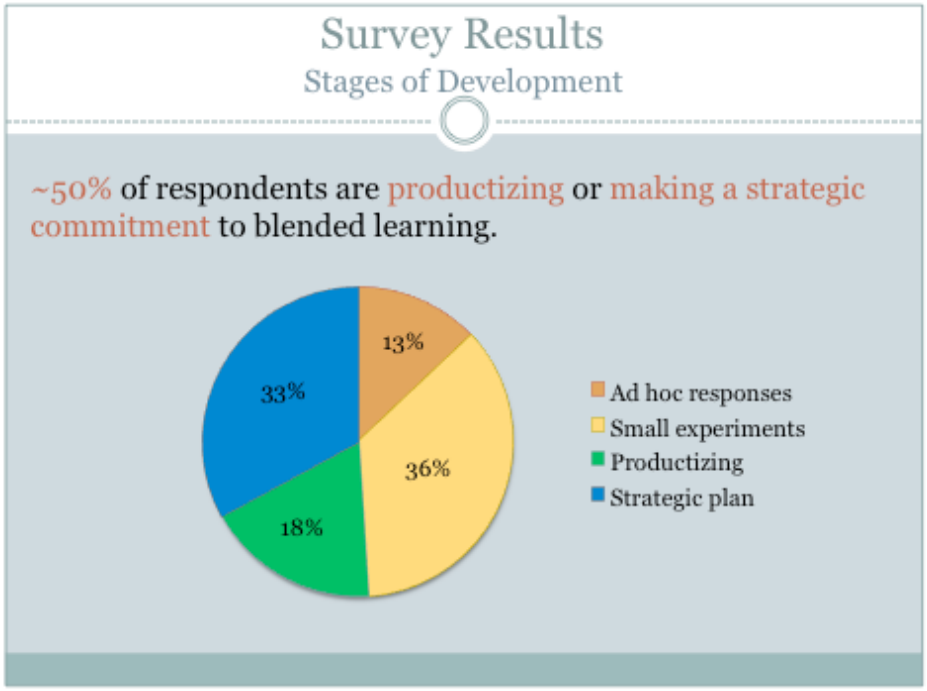


Figure 3

As Figure 3 indicates, half of the schools responding reported that they are at the stage of productizing or making a strategic commitment to blended learning. This suggests that, of the 71% who said they offered blended learning elements in their open enrollment and custom offerings, half are well on their way to making it part of their brand.

## Corporate Trends

Looking beyond university-based executive education, a study completed by Duke Corporate Education attests to the increased interest in blended learning within corporations. Duke CE surveyed 142 companies, predominantly in North America and Europe, about their intended use of virtual elements in their corporate education. The data show that corporations anticipated an increased use in a wide range of virtual learning methods between 2008 and 2011 (see Figure 4). In order of priority, they are:

- Virtual Classroom/ Instructor Led Webcasts with 88% of corporations intending to use more in 2011 than in 2008
- Blended Face-To-Face and Virtual Learning with 79% intending to use more in 2011
- Individual, self-paced e-learning with no instructor with 66% showing greater interest
- Social Networks e.g., Facebook and LinkedIn with 60% intending to use more in 2011

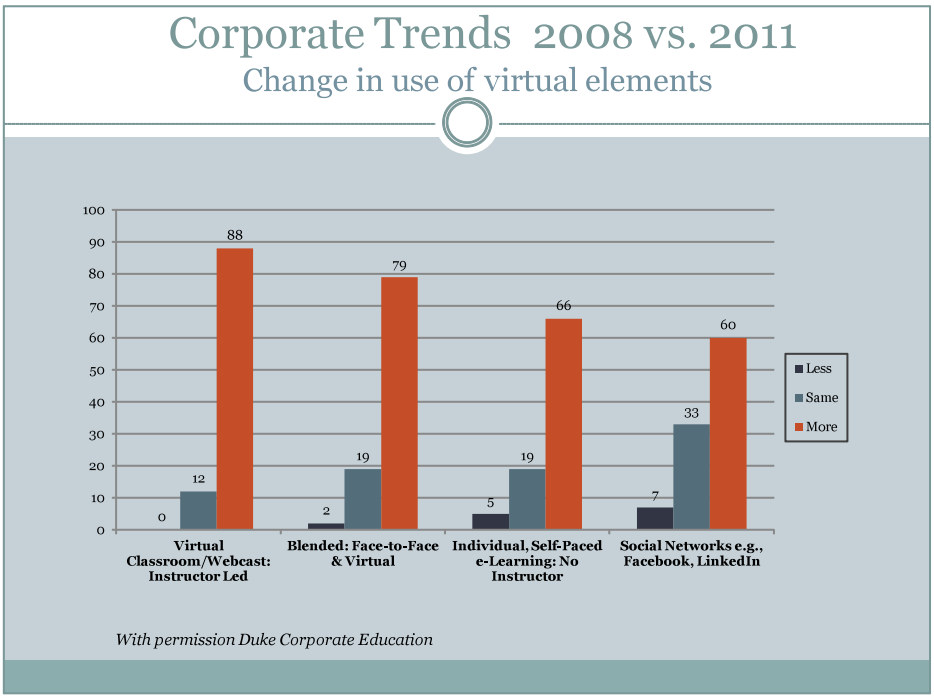


Figure 4

## Summary of Survey Responses

In summary, our survey data indicate that blended learning has entered the mainstream of executive education. Our data confirm that schools are offering blended learning programs, and new technologies are supporting this effort. Much of the increased activity in blended learning is driven by client demand. Companies today desire a greater application of concepts to the world of work. In addition, chief learning officers perceive learning as an ongoing activity, not an event. Blended learning allows the learning experience to be extended over a longer period of time and to be integrated into the participants' work experience. Finally, clients want efficiencies in both time and scale.

## Examples from Schools

In the process of conducting interviews, we encountered a number of examples of how member schools are integrating blended learning before, during and following their face-to-face programs.

*Blended learning as a pre-classroom activity*

Wharton uses blended learning to make more efficient use of participants' time when they are on campus. Activities considered part of the program launch, such as participant and faculty introductions, the program overview, and a review of the program schedule are all completed online before participants arrive on campus. Participants are also asked to post their goals for the program online. These are given to the faculty director to review before the participants arrive and referred to during the program.

Companies like these blended learning elements because they believe they increase the value derived from the program. Participants like them because it makes them feel that the program is more personalized and responsive to their needs.

*Blended learning as part of the classroom experience*

At IMD, faculty are restructuring the classroom experience to reflect the rapid pace of change that is going on in industry. Using iPads in the classroom, they have created a structured process for bringing the outside world inside. With a large portion of the classroom time now used for group work and group experiences and less reserved for traditional faculty lectures, participants are taught how to search for the most current information and where to find it. Using blogs and Twitter, for example, participants search for competitor news, new product information, and read the opinions of key people in their industry.

Companies value this forward-looking approach. In an environment where the key to success is learning faster than the competition, executive education has become a valued strategic tool.

*Blended learning as a reinforcement between program modules*

Harvard uses a competitive simulation between the on-campus modules of its Program for Leadership Development (PLD), both to extend and reinforce learning. Participants begin the first round of the simulation while they are on campus in Module II. Then, after they return to their companies, they continue to work on the simulation in their pre-assigned teams. They send in their results on a scheduled basis and get periodic feedback from the faculty. There is a

simulation debrief when they return to Harvard for the second on-campus module as well as a rewards ceremony for the winning team.

Participants value the opportunity to "test drive" what they have learned in a simulated work environment. They maintain focus because it is a competitive project. In addition, they experience the challenge, first hand, of working as a virtual team across geographies.

*Extending the program with blended learning*

Columbia University has introduced webinars to reinforce and enhance the learning after participants in its four-week executive program leave campus. Two months and six months following the program, faculty re-engage with the group. Participants update their peers and the faculty director on the personal learning goals and the objectives they set for themselves before leaving campus. Faculty facilitate these updates, providing coaching and encouragement.

This engagement reinforces the idea that what they learned is meant to be applied in their own work and that learning is an on-going process.

*Learning journeys, the overlooked blended learning element*

In response to our survey question, "What has been your participants' reaction to the blended learning elements you have used?" sixty-eight per cent of the respondents reported a very positive or positive reaction to learning journeys. Learning journeys are opportunities to go completely outside of a participant's normal work environment. They are about learning from individuals whom one would never meet, in contexts that are new and challenging. Some learning journeys involve doing deep dives into entirely different companies in different industries or non-profit organizations. Leadership learning journeys often include an element of self-reflection.

Insead does a fair amount of what they call "discovery learning." In many of their custom programs, they visit customer sites or other companies outside the client's normal sphere of business. These visits are facilitated by the faculty. Often there are action learning projects involved in which participants work in teams to solve problems. For example, exploring business opportunities in emerging markets is not simply about making products cheaper, it is about creating products that meet specific needs. Taken to another continent, as part of the program, the participants get to answer the question:  How do you design products that people need? They learn that they have to go and find out, how people live – how do they do their washing, how do they prepare and store food, what problems do they encounter, and what are potential solutions.

*Blended learning as a solution to scaling*

For Northeastern University, blended learning was rapid response to a client's changing need. Having successfully delivered a traditional classroom-based program for a number of years, a key client suddenly requested that the same program be delivered entirely virtually because travel to Northeastern in Boston was no longer an option. The move to a virtual environment offered a number of benefits (both intended and unintended).

One benefit was that the program could be offered more often to global cohorts that may not otherwise have had access to the program, doubling the number of participants completing the program each year. Another benefit was that case studies had to be designed differently to keep participants engaged in the virtual environment. This required a move away from using traditional case study teaching methods to an approach through which key concepts were conveyed by using video clips capturing the actual voices of sellers and customers (an approach Northeastern now uses in its on-ground programs as well). And a third benefit was raising the profile and visibility of the program among the client's executive ranks. This was achieved by inviting company executives from around the world into the live virtual classroom to "judge" and offer feedback on the individual and team projects participants are required to complete during the course of the program.

While Northeastern had to travel a steep learning curve in a short period of time, now that they are there, they see opportunities to offer their expertise in creating a robust virtual learning environment to other clients.

## It's All About Design

From these excellent examples, it is clear that quality learning is occurring apart from traditional classroom instruction. However, our interviews also exposed another significant shift. As schools think about how content can be delivered more efficiently and effectively, we found, in each example, the field of university-based executive education moving from an exclusively faculty-centric program design to a shared faculty/director design. The executive education department staff were active, and necessary, participants in designing, preparing for, and delivering the blended learning elements described above. This design process for successful blended learning focuses on selecting the design and delivery mechanism that best suits a particular learning element. For most of us, this is a significant departure from the traditional way we have developed programs. It is no longer sufficient to corral the best faculty, put them in a room and let

then work their magic. Blended learning requires thinking about each element in the program and asking what is the best way to deliver this content. Introducing blended learning into programs is not about technology; it's all about design. And the responsibility for the design of the blended elements and their integration with classroom instruction rests primarily on the shoulders of the executive education staff.

## Useful Tools and Frameworks

As is evident from the preceding examples of blended learning elements woven into executive education by in the UNICON member schools, many different approaches are being used. During the interviewing process, we wanted to learn how schools had developed what they did. We asked what the schools were doing in blended learning, why they had chosen to do what they did, and how had they gone about designing and deploying their non-classroom elements. In attempting to summarize their answers, it became important to have a generalized framework. A number of design criteria or considerations emerged. It seemed useful to build a Blended Learning Design Worksheet, based on the approaches that we heard described. In addition, three overarching standards of excellence emerged that we combined into a Blended Learning Design Rubric. Both these tools are drawn from what we learned in our interviews and are intended as tools to help structure blended learning design conversations among executive education staff teams.

### Blended Learning Design Worksheet

First, we offer a Blended Learning Design Worksheet (see Figure 5) to be used when a team is considering what and how to deliver blended learning elements as part of one of their executive education programs. This worksheet is intended to help structure the design conversation. There are no right answers, just a lot of good questions that need to be considered.

Conceptually, any element of a program could be considered for possible blended design, that is, non-classroom delivery. Any program element selected needs to be carefully thought through and designed, taking a series of design criteria or considerations into account. The worksheet columns are important criteria or considerations to think through when designing blended learning elements in a program.

| Blended Learning Design Worksheet<br>Design Criteria | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Individual work?** | **Collaborative work?** | **Work-based activity?** | **Co-located?** | | **Dispersed?** | | **Supporting Technology?** |
| | | | | **Synchronous?** | **Asynchronous?** | **Synchronous?** | **Asynchronous?** | |
| PROGRAM ELEMENT | Participants<br><br>Learning objectives<br><br>Incentives | Participants<br><br>Learning objectives<br><br>Team make-up<br><br>Cross-team fertilization<br><br>Incentives | Projects/ Reflection<br><br>Confiden-tiality<br><br>Company involvement<br><br>Feedback | In-Class/Out-of-class<br><br>Timing<br><br>Use in program<br><br>Confidentiality<br><br>Tracking<br><br>Backup<br><br>Capture for future use | | Timing<br><br>Use in program<br><br>Confidentiality<br><br>Tracking<br><br>Backup<br><br>Capture for future use | | Ease of use<br><br>Company constraints<br><br>Technical support<br><br>Hardware & software |

Figure 5

## Design Criteria Summary

*Individual work or Collaborative work?*

The first pair of Design Criteria asks the question: For any program element, is it best experienced as individual work or as collaborative work?[3] Or could there be both individual and collaborative components?

*Work-based activity?*

Then, it is important to consider: How can this element relate to the participants' work environments? How visible should this connection be made?

*Co-located or Dispersed?*

Next, you will need to consider another pair. Regardless of whether it is to be individual or collaborative work, you want to ask the question if the element is best done when participants are co-located or dispersed. And having made this determination, you still have to consider should

[3] Thanks to Steve Mahaley of Duke Corporate Education who advocated that all program design should start with the question: "Is this element of the program better learned by someone alone? Or would it be better if it were learned in collaboration with others."

the learning element be conducted as a synchronous or an asynchronous activity? Or perhaps both?[4]

*Supporting Technology?*

Finally, the design team will have to answer the delivery question of what is the best supporting technology? Technology implies both hardware and as well as software with consideration given to how you will support participant and faculty use of both.

At a high level, these criteria are critical to the design decisions made about any blended learning element under consideration. Under each criterion, we have suggested subtopics to guide the discussion. For a full description of each subtopic, refer to Appendix A. The worksheet and its subtopics are intended to help encourage a wide-ranging and full discussion. Hopefully, you will add to the list of subtopics and design criteria based on your own design experience.

## Using Wharton As An Example

In order to get a sense of how this worksheet could be used in the design process, we will apply it, using reverse engineering, to the Wharton example described above. Assume that the design team wants to reserve classroom time for more value-added activities than the program overview and schedule review. If they can get the participants to review these elements online, before the participants come to campus, they will have accomplished this goal.

*Individual work or Collaborative work?*

Following the worksheet, the design team would first ask: Is hearing the overview and schedule review done best by an individual or is there a reason to do it with others? If it seems that there is no significant reason to have it done in a group setting, the team will want to dig deeper to have a clear, shared idea of the participants' profiles, what they need to get out of the elements, and what will get them to do the work on their own before the class starts.

- *Participants*

  You would want to discuss the nature of your participants. Are they too senior to go online for content? Do they come from a culture in which assistants do all computer work? If you are thinking video, are participants from geographic areas that make broadband access unreliable? Do your participants sign up at the last minute with no time to spare?

[4] Thanks to Guy Saunders from Insead for recommending the top-level paired design criteria: "Should/can the participants be co-located or dispersed?" Once this is determined, it is necessary to select synchronous and/or asynchronous activity(ies). This improvement in the Worksheet had not yet been incorporated at the time of the research presentation given at the UNICON Conference on November 29, 2011.

- *Learning objectives*

  It is important to be explicit about the purpose of providing the program overview and schedule review. Are they to transmit the information? And if so, what is essential that participants know after learning about both? Are these elements intended to get participants to focus on what questions they may have? To set expectations? Once the learning objectives are clear, you have a metric for the detailed design decisions that will come later.
- *Incentives*

  Since you are proposing to put the onus on the participant to digest, in some form, important introductions to the program, you should consider what would be a good motivating factor. Do you need to provide it? Can you count on intrinsic motivation? What will be the consequence if participants fail to comply? What is a reasonable amount of time to ask participants to allocate for this activity?

At this point in the discussion, when considering the difficulty of getting the participants' attention before the program starts, the suggestion may surface that you could include interactive activities as motivators. Participants could introduce themselves and reflect on their goals for taking the course after they have heard the program overview and the schedule review. This collaborative work would help motivate the individual work as well as help to focus participants on the program and what they hope to get out of it. In addition, faculty could benefit from getting their class' profile before the program starts. For these activities, the design team would revisit, in the collaborative work column, some new subtopics as well as some of the same subtopics they discussed before.

- *Participants*

  Would asking for online posting of introductions or goals be hard for any of this population? Is English a comfortable language to ask them to use? Is the size of the class conducive to this type of activity?
- *Learning objectives*

  What is the expected outcome of seeing each other's introductions? Should pictures be requested or required? Should faculty introductions be included? How could faculty use the posted goal statements? Would offering a sample help in either case? Is the size of the class conducive to these types of activity?
- *Team make-up*

  Since this is still an individual activity, teamwork is not an issue. However, if this were for a custom program with intact work teams attending, goal setting might be assigned as a team effort.

- *Cross-team fertilization*

  The design team might consider how to optimize the benefit for individuals seeing each other's introductions. If it is a large group, how much information is appropriate, and could it be supplied from their enrollment forms? Is it important for participants to see each other's goals? Should goals be kept private for use by the faculty member only? Could the goals be private and then grouped for public display?
- *Incentives*

  The benefit of collaborative work is that the group can provide a motivating factor for individuals. How can you stimulate both curiosity and intention in your participants? Can the inclusion of the interactive elements (i.e. introductions and goals postings) help provide individual motivation to review the program overview and schedule review? Should there be a "promise" of some reward? Who would be best to do the "ask?" Is there any way to apply group pressure by tracking completion? What could be the consequence for lack of participation? Would the faculty posting the program goals or their own goals be an incentive?

*Work-based activity?*

Following the worksheet, the design team would then consider how, if at all, these four activities could be brought to bear on the participants' work environment.

- *Projects/Reflections*

  In this case, the design team would note that there is no project work involved, only the personal reflection of the individual. Would it be appropriate to ask participants' to put their goals in terms of work issues they need to address?
- *Confidentiality*

  If participants are asked to relate their goals to work issues, should the posting be anonymous? Should they be aggregated and reported as clusters? Can the faculty see the discrete submissions, even if they are aggregated? Would some of the motivational benefit be lost if individual postings were not seen?
- *Company involvement*

  Do the sponsoring companies use this sort of goal-setting as part of its development program? Should this be leveraged?
- *Feedback*

  Is there value in having faculty reflect, interactively, on the goal postings? Could the faculty link topics covered in the classroom to some of the submitted goals? Would participants be interested in how their goal profile matches ones submitted for prior programs?

*Co-located? or Dispersed?*

Following the worksheet, the next pair of criteria would help the design team discuss if the four proposed activities (program overview, schedule review, introduction and goal postings) will be done in a co-located or dispersed mode. As with the first pairing, Individual or Collaborative work, the team may discover that they would like to consider a little of both. However, at the outset, these activities are generally to be done in a dispersed and asynchronous mode. With this as the frame of reference, the team would want to consider the subtopics.

- *Timing*

  The timing of making the program overview and schedule review modules available is important. Since they are the prerequisite to doing the goal posting, should they be available as soon as enrollments begin to come in or do you want to launch them closer to the program start? Are participants most likely to view them when they have just enrolled? Does the platform for posting introductions and goals have to be implemented and explained as soon as enrollments start? Would a staggered schedule of assignments keep the participants more focused on the program? Should there be deadlines to get optimal value? Do you want to remind participants to revisit the online assets just before coming so they can be reminded about what they are hoping to get out of the program?

- *Use in the program*

  The design team needs to make explicit how faculty can help. Will faculty be willing to be captured on video giving the program overview and schedule review in a format that can be seen online? Would they be willing to motivate participants to do the pre-work by giving feedback? Having committed to omitting the normal program overview and schedule review in the classroom, how will the faculty use the open time on Day 1? How can the faculty tie the posted goals into their classroom material? What do faculty need to make their roles easy? Would the faculty want to ask participants to revisit their goals during the program or after the program is complete?

- *Confidentiality*

  If the design team has already discussed the issue of confidentiality in the context of *Work-based activity,* they may only need to refresh their decisions at this time. If there are open issues, now is a good time to discuss such questions as: If participants are asked to relate their goals to work issues, should the posting be anonymous? Should they be aggregated and reported as clusters? Can the faculty see the discrete submissions, even if they are aggregated? Would some motivational benefit be lost if individual postings were not seen?

- *Tracking*

  Given the dispersed, asynchronous activities, it is important for the delivery team to judge the effectiveness of the pre-program work and to intervene if it is not going as planned. Do you need the ability to track who has looked at the modules to make sure everyone has seen them? It will be clear who has posted their own introduction and goals. Do you want to send out reminders? If so, should the reminder go to individuals or to the whole group? If the participants' goals are supposed to be anonymous, can reminders be sent out to the laggards or do reminders have to be to the group as a whole?
- *Back-up*

  Since the program overview and schedule review are no longer delivered in the classroom, what back-up do you want in case someone has not seen them before the start of the program? Do you want stations at registration or modules available through the hotel TV for people to see them at the last minute? Do you want people to continue posting goals after the start of the program? Do you want the executive education staff to populate the introductions with enrollment information for anyone who has failed to do their own?
- *Capture for future use*

  What information that has been posted (i.e. introductions and goals) would be useful for later use in this program or in later programs? Are there any data mining opportunities? If it is a custom course, is there data that the sponsoring company could use?

*Supporting Technology?*

Jumping to the final criteria, the design team needs to explore the supporting technology. On the one hand, the design team needs to think through how to capture and deliver the two content elements, the program overview and schedule review. On the other hand, they need to consider the optimal way to request, have posted, and display the online introductions and goals.

- *Ease of Use*

  The team must consider the easiest way for participants to have access to the program overview and schedule review. Is video or just audio required? If the modules are hosted on the school's Learning Management System, will participants be willing to go through the log-in process? How can you incentivize them? Or could they be just as easily posted on YouTube with an email link? If so, will participants still have to sign on to the school LMS when they are ready to post their introductions and goals? Will that work in all your geographies? Could participants put their introductions and goals in a "dropbox" for school staff to post? If so, will they ever look at what others are posting? This is an important time to revisit your participant profiles to see where there are constraints.

- *Company constraints*

  It is easier to discover client company policy constraints or firewall issues when it is a custom program. Open enrollment programs are more difficult. Do you need to consider a way to "test" the participants system for access issues?
- *Technical Support*

  How will you provide technical support for both hardware and software issues? With worldwide enrollment, does it have to be a 24X7 hotline? If so, who can provide it? If participants call or email questions, should the support person be ready to answer the questions, even if they are program related, not technical? What escalation system will you have for unanswered or unresolved issues?
- *Hardware and Software Requirements*

  Are there hardware or software requirements to make explicit to participants? Which video/audio protocol should you use, given the geographic dispersion? Can the video/audio modules be run on both Apple and PC platforms? On iPads? Does any client software needed to be installed? What type of testing can be done before going live if this is a new approach? What platform will work best for posting and displaying introductions and goals? Will you allow modifications of postings after they are up? How secure can you make the platform?

Walking the Wharton example through the worksheet demonstrates its use as well as the fact there are no answers – just many important questions to consider when designing a blended element. (See Appendix A for a review of each subtopic) The Blended Learning Design Worksheet's criteria and subtopics are intended to encourage wide ranging and full discussion. What our research illustrated, however, is that most of the questions on the worksheet are not ones that faculty will pose or be engaged in. The robustness of the design depends on the design team thinking deeply about all these criteria so faculty can be assured of their success with minimal effort on their part. Hopefully, UNICON members will find this worksheet useful enough to refine and expand it and perhaps share improved versions as time goes on.

## Blended Learning Design Rubric

The second design tool that we would like to propose is a Blended Learning Design Rubric (see Figure 6)**.** Teams designing blended learning elements for their programs may benefit from having design standards against which to measure their efforts. The three standards proposed here emerged during the detailed interviews conducted with practitioners. On reflection, the standards of this rubric apply equally well to designing traditional programs. For the purposes of

this report, however, we propose to discuss how the rubric can be used when designing blended learning elements.

Designers and deliverers must ensure that the participants and faculty experience all three standards: Focus, Trust, and Ease of Use.

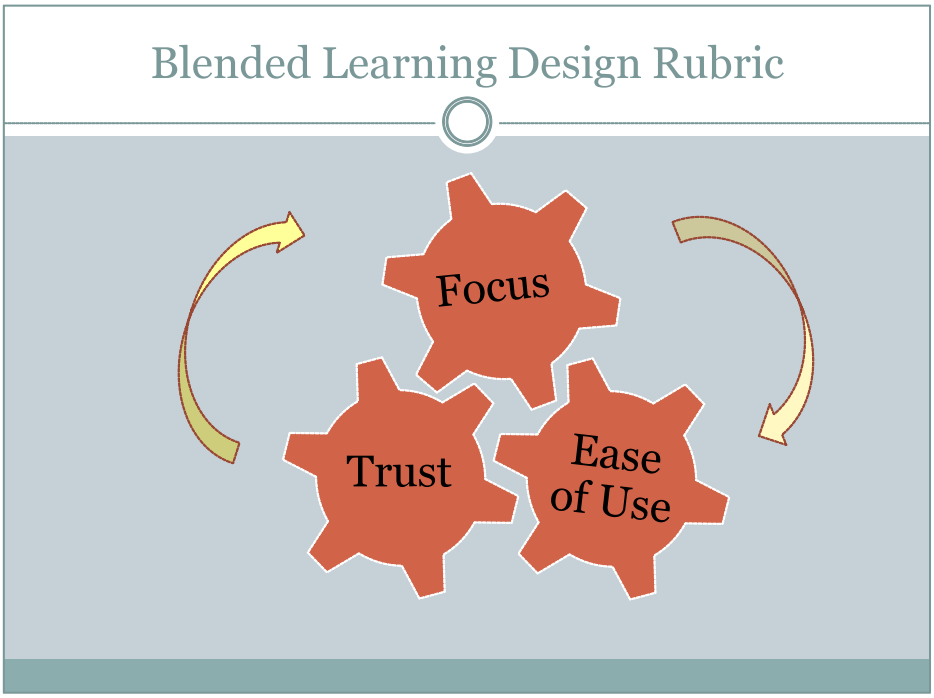


Figure 6

Focus is created when the course elements are relevant to the participants' work/interest. Work/interest relevance is the most important metric to achieve. However, focus also is achieved when the blended element is relevant to and used in the program itself and is important to the faculty. Participants will lose interest if they are asked to do something that is extraneous, tangential, or not critical to either their own work or to the curriculum. For example, asking participants to post work-related goals and then weaving their goals into the curriculum will keep participants focused.

Trust comes from the faculty and staff doing what they say they will do and organizing the program so it is a safe space to learn. Blended elements in the course need to be explained clearly at the outset. Participants need to be told what they are expected to do, how it will work, why it is important, and why it is set up the way it is. Faculty must support the work done outside the classroom. If the participants experience lack of coordination or definition, failure to follow

through, or lack of faculty commitment, they will feel at risk and betrayed. If faculty insist on giving a program overview and schedule review, despite the fact that participants have seen them online, trust will be broken.

Ease of use is the result of explicit and easy to follow instructions, individual help, simplicity of systems, and flows that work. This is particularly important with technology-mediated delivery. Hostility and frustration is quickly turned on the program because of any technical problem. Sometimes, company firewalls prevent participants from logging into a school's learning management system without intervention from the IT department. Faced with the difficulty of completing an online assignment, they will lose interest in the program or not contribute to their team's project.

This rubric is intended as a tool to be used at every step of the design and delivery cycle. To see how it can be applied, we would like to return to the Harvard example of blended learning described earlier in this report. In Harvard's open enrollment Program for Leadership Development (PLD), participants engage in a team simulation between their two, on-campus modules. The goals of the design team for this simulation exercise were for participants to engage in an experience that let them: apply the material covered in the first module in a lifelike situation, experience being a member of a virtual team, and remain engaged between terms.

### Blended Learning Design Rubric Example: Harvard's Mid-Program Simulation

Reviewing each step in the design and the delivery processes in this example offers concrete examples of each standard of practice. (See Figure 7)

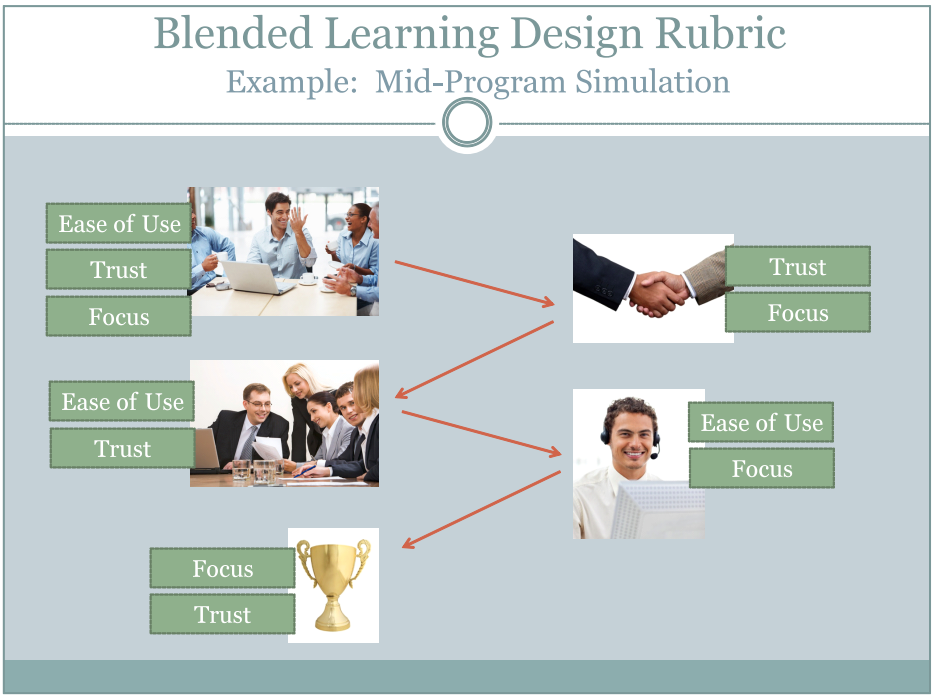


Figure 7

*Design Team Pre-Work*

The Information Technology team within Executive Education found an off-the-shelf, team-based simulation that covered topics from the first module. Before proposing it to faculty, they first ran the simulation themselves. Having experienced the simulation themselves, they knew that it met their criteria for focus. However, they were also clear that participant teams needed to run their first round during Module II, while they were still on campus, to ensure ease of use and to build teams' trust. The design team decided the teams would be grouped by common industry so they had tacit knowledge in common and would be geographically diverse to give the participants experience in working as a virtual team during Module III. The design group laid out a weekly plan for the deliverables. All these decisions were explicit and could be described and justified so participants and faculty could trust the design decisions. Motivating the participants to do the work was a concern. To ensure the teams stayed focused, they decided to make this a competitive exercise, with a winner announced in the second on-campus module (Module IV).

*Faculty Agreement*

With the full design defined, the group presented it to the faculty chair and received his agreement to debrief the simulation results in a session during Module IV. Linking the outcomes to the material from Module II and the participants' own work experience would enhance their

interest and focus on the exercise. Faculty involvement would confirm the teams' trust that the faculty believed in the importance of the simulation. To acknowledge the participants' hard work and results, the faculty chair also agreed to give the award to the winning team and compliment all the teams on their focused effort**.**

*Module II Launch*

During the first on-campus module of the program, the rationale for the team assignments is described explicitly to create trust in the process, and the teams have time to get to know each other in person and build trust as a team. The first iteration of the simulation takes place, on campus, so the participant teams learn that the simulation is easy to use. The teams plan how to get the work done and commit to focus on the deliverable timetables.

*Module III Teamwork (off-campus)*

When the teams are back at work, the executive education support staff handle any trouble calls, ensuring ease of use. Interestingly, when the program first included the simulation exercise, the staff support was augmented by support people from the company that sold the simulation to give the Harvard staff a chance to climb the learning curve quickly. The program's support staff track team submissions, check in with the teams weekly, and send out helpful reminders to keep them focused. The teams' focus is further encouraged with periodic check-ins with faculty.

*Module IV Close*

Back on campus, the teams have a class session for a simulation debrief by the faculty chair. Insights from the simulation experience are related to program material, as well as related to participants' own work experience. The relevance of the simulation supports the participants' focus. Finally, the award ceremony in Module IV clearly fulfills the criteria of trust and focus by rewarding the performance of the teams.

As you design and embrace blended learning elements, it may be useful to explicitly evaluate your blended element design process and delivery using the three rubric standards to guarantee the best possible engagement for your participants and faculty. At each step in the design and delivery of the blended learning program element, you need to ensure that participants and faculty experience focus, trust, and ease of use.

## Critical Success Factors and Supporting Systems

Based on the survey data, executive education departments are clearly moving forward and making blended learning a part of their standard offerings. This report has profiled a few case studies from UNICON member schools. Based on the schools' self-descriptions and experience, schema for making design decisions have been extracted and proposed. The critical success factors and supporting systems to design and deliver blended programs is the final material to be reported. The following are the critical success factors that were reported in the survey and in the interviews in order of importance:

- Appropriate program staff skills – in program design and technology
- Faculty interest
- Substantial Information Technology support
- Appropriate technology
- Outsourcing relationships

From the survey, UNICON member schools identified faculty interest as the highest ranking critical success factor. However, given our conclusions that "It is all about design," we would argue that appropriate program staff skills – in program design and technology – should be first on the list. There is no doubt that faculty interest, in the form of agreement, approval, and participation is critical and necessary. However, with appropriate design and technological capability, the executive education staff can legitimately encourage the faculty and bring them along. If faculty are already pushing for using blended elements, the staff must be ready to take on the challenge. Conversely, the staff can often proceed with some blended elements – albeit on the margin – with less than wholehearted faculty involvement. When these are executed successfully, they will serve as a proof of concept to use with faculty. Above all, whatever you do, the faculty need to feel confident that they will be seen as successful.

All the schools providing case examples reported that they needed and had substantial Information Technology support. Part of this expertise is needed during the design phase. Part is necessary during delivery phase to provide participant and faculty support. It is essential that participants and faculty experience complete ease of use. When the inevitable problems occur, participants and faculty must have speedy and complete resolutions. Lacking adequate Information Technology support, schools may need to source it from outside vendors. Two large UNICON members reported that they have their own dedicated IT group within executive education. Another member has used its university IT staff to support a totally virtual program for

one of its large custom clients. A final member outsourced its technology support to an outside group, having them build custom program websites, facilitate project work, and handle any technical questions. Clearly, many approaches work well to ensure that technology support is competent, available, and scalable.

Designing for and having available the correct technology for program delivery is essential. Earlier in this report, we included survey data about the technologies used by UNICON members. It appears advantageous to use off-the-shelf products that are commonly used in corporations. Typically, member schools reported using more than one technology. Repeatedly, schools said that they had used a number of technology platforms in order to determine the best approach. Universally, schools said that taking the simplest approach is the best.

The ability to form outsourcing relationships may prove critical to delivering blended elements that are too difficult to develop from scratch and/or that faculty do not want to deliver themselves. For example, mobile apps and simulations require a large investment to create and may be better to buy from others. Some of the larger schools are developing these learning aids themselves, but it is not likely that smaller schools can justify the investment. Outsourcing blended elements such as simulations, executive coaching, mobile apps, experiential outdoor exercises, may be the best solution. To deliver rapidly, executive education departments will be well served if they understand their procurement processes and have identified external sources in advance.

## Conclusions

In response to market and economic realities, as well as advances in learning technologies, both business school directors of executive education and senior human resource professionals have expressed an increased interest in blended learning. The primary objective of this research was to test the assumption that blended learning has entered the mainstream in executive education. Moreover, if blended learning is becoming part of the executive education landscape, executive education providers need to be able to understand its potential and deliver on its promise. Secondary objectives of the research were to:

- present examples of how blended learning is being used effectively in university-based executive education
- offer useful frameworks and tools to assist schools in designing blended learning programs
- identify the critical success factors and supporting systems that need to be in place for these new models to succeed.

The authors conducted a survey of UNICON member schools about their current practices as they relate to blended learning. They also conducted in-depth telephone and face-to-face interviews with associate deans and directors of executive education, senior HR executives and senior consultants. In addition, they reviewed relevant articles from practitioner-oriented publications.

Taken together, responses from the UNICON member survey, as well as our interviews and reviews of published studies, provide evidence that blended learning has in fact entered the mainstream of executive education. However, blended learning today is quite different from the "click and learn" modules popularized in the 1990s which "focused on the shimmer of new technologies…." [5] Blended learning today is a sophisticated integration of face-to-face and technology-enabled learning environments that provide an enhanced learning experience. Blended learning has become a valuable component of executive education. The old mold of blended learning has been broken.

While benefitting from the proliferation and broad use of new communication and social media technologies, the key to today's successful blended learning is not its focus on technology, but its focus on design. Today's blended learning integrates the right mix of learning elements into a strategic design that is delivered over a period of time and is tied to business objectives. As corporations desire to move learning closer to the world of work, to extend the learning experience over a longer period of time, and to foster connections among participants pre- and post-program as well as between modules, blended learning offers an innovative approach to executive development.

This research report profiles a number of case examples from UNICON member schools using blended learning activities as an effective complement to face-to-face interactions. It offers the Blended Learning Design Worksheet as a useful tool to structure the program design conversation. Critical to the success of a blended learning program is achieving the right mix of learning elements and selecting the best delivery mechanism to deliver an engaging learning experience. Through a series of questions, the Blended Learning Design Worksheet guides program designers in selecting robust designs, delivery mechanisms, and supporting technologies for each blended learning element.

In addition, we propose using the Blended Learning Design Rubric as a standard against which to evaluate a blended learning element's design process and delivery. The rubric's three assessment

[5] Snipes, Jeff. (May 2010). p. 38.

criteria--focus, trust, and ease of use--emerged from our in-depth interviews. All three are critical to participants and faculty experiencing a successful blended learning engagement.

Finally, the research report identifies a number of critical success factors and supporting systems necessary to deliver blended learning programs. As the industry shifts from a classroom-centric to a blended model of executive development, executive education departments need to develop the staff's program design skills and technological capability to deliver blended learning programs. Faculty engagement is essential. Strong IT support is critical to the successful delivery of blended learning, whether it is provided by a dedicated IT group within the executive education department or a partnership with an outside group. Having the appropriate technology available to support websites, facilitate project work, and handle technical questions is essential. Finally, being ready and able to tap resources outside the university may prove critical to the quality and speed with which executive education departments can deliver some blended learning elements to the market.

The executive education industry is embracing a blended model of executive learning. Corporations have witnessed the value of blended learning in optimizing the learning process, achieving efficiencies in time and scale, and simplifying the transfer of knowledge and skills to the work environment. Many schools are moving toward productizing and making blended learning a key element in their strategic plan.

Based on this research, our advice to all UNICON member schools with regards to blended learning is:

- Make a plan
- Develop design processes and expertise
- Develop staff capability at all levels
- Work with faculty on introducing blended learning elements
- Acquire technology either in-house or outside
- Build partnerships for IT support services, executive coaching, mobile applications, etc.
- Run experiments – learning from your experience and from your participants – redesign based on results, and look for possible cross-fertilization between blended elements and existing face-to-face programs.

Finally, think ahead to the millennium generation, to programs that are entirely virtual, to the next wave of technology.

## Appendix A

This Blended Learning Design worksheet progresses from left to right. As a result, the critical discussion about participants is only cued in the first pair of criteria. If one were to jump into a discussion of co-located or dispersed activity without having a deep understanding of your audience, a critical piece would be missing. In addition, it may be necessary to revisit design criteria when you get to the supporting technology. You may find that during the discussion you have unearthed some opportunities or barriers that make you rethink your initial design. It is the authors' hope that UNICON members, having put this worksheet to use, will add additional criteria or refine these criteria and subtopics and share their learning with the other members.

**Blended Learning Design Worksheet**
**Design Criteria**

| | Individual work? | Collaborative work? | Work-based activity? | Co-located? | | Dispersed? | | Supporting Technology? |
|---|---|---|---|---|---|---|---|---|
| | | | | Synchronous? | Asynchronous? | Synchronous? | Asynchronous? | |
| PROGRAM ELEMENT | Participants<br><br>Learning objectives<br><br>Incentives | Participants<br><br>Learning objectives<br><br>Team make-up<br><br>Cross-team fertilization<br><br>Incentives | Projects/ Reflection<br><br>Confiden-tiality<br><br>Company involvement<br><br>Feedback | In-Class/Out-of-class<br><br>Timing<br><br>Use in program<br><br>Confidentiality<br><br>Tracking<br><br>Backup<br><br>Capture for future use | | Timing<br><br>Use in program<br><br>Confidentiality<br><br>Tracking<br><br>Backup<br><br>Capture for future use | | Ease of use<br><br>Company constraints<br><br>Technical support<br><br>Hardware & software |

The following are the criteria subtopics in alphabetical order. Cues for each subtopic are some of the key items to discuss. Blended learning design teams will, undoubtedly, think of more.

| | |
|---|---|
| **Back up** | Alternative delivery systems, safety-nets, interventions, extensions |
| **Capture for future use** | Within program, across programs, within exec. ed. department, within sponsor companies |
| **Company constraints** | Policy, procedures, firewalls, bandwidth |
| **Company involvement** | Executive mentors/sponsors, HR development staff, guest lecturers, project sites, project recommendation adoption mechanisms, site visits |
| **Confidentiality** | Privacy among participants, company information privacy, non-disclosure agreements, security for web-enabled delivery, ability to modify, approvals required |

| | |
|---|---|
| **Cross-team fertilization** | Within a class, across cadres, within sponsor company, cross-team commentary, ease of review of material, extraction/grouping of learnings |
| **Ease of use** | Faculty aids and crib sheets, ease of platform and asset access, clarity of instructions, reminders, staff support, technical support, geographic hurdles, corporate firewalls/policies |
| **Feedback** | From faculty, from company executives, from other participants, from program graduates, scheduling feedback |
| **Hardware & software** | Provision of equipment, requirements to make explicit, choice of protocols, choice of platforms, need for client software, pre-launch testing system, security, technical contact within participant companies |
| **Incentives** | Clear deliverables, explicit faculty expectations, explicit company executive sponsor expectations, peer pressure, company promise of adoption, competition, appropriate time required for assignment, consequences for non-compliance, stimulation from interactive/vivid delivery, role-modeling |
| **In-Class/Out-of-class** | Allocation of classroom time, workspace provision out of classroom, hardware/software provision in/out of classroom, collection of group work, posting of group work, instructions for activities, faculty/staff oversight |
| **Learning objectives** | Information, understanding, actionable results, skill, excitement, ability to field questions, size of group relative to learning objectives, use of templates as guides |
| **Participants** | Size of class, seniority/rank in company, cultural norms, corporate norms, geographic location, age, size of company, gender, when they will be known to exec. ed. staff, command of language(s) |
| **Projects/reflections** | Work-related, personal, action learning projects design, individual work, team work, sponsorship by company(ies), post-program follow-up |
| **Team make-up** | Diversity or commonality (in rank, roles, geographies, company units, industries, gender, age, etc.), tools for team coordination |
| **Technical support** | Hardware question support, software question support, availability and staffing on the ground and at a distance, escalation process, frequently asked question database, pro-active diagnosis, contacts in companies |
| **Timing** | Launch time, deadlines, sequence, reminders, points for feedback, points for reporting out |
| **Tracking** | Tracking clicks, monitoring progress and compliance, reminders, interventions, |
| **Use in program** | Faculty role, classroom schedule modification/inclusion, post-program follow-up, displaced classroom content |

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