

THE SEARCH FOR THE HOLY RECIPE

Distance Learning is a conflicted arena of human endeavor if there ever was one. Actually, in Education there is nothing so insignificant that it cannot be contentious.

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I'll come clean. I hate the term 'blended learning'. I'm not alone. A number of people including several e-learning luminaries have shared their dirty little secret with me. I can't help reading 'blended learning' as 'we can't make up our mind learning'. We're not sure which type of learning to use so we'll use lots and hope that the whole is greater than the sum of its parts. Now some people are saying that 2003 will see 'blended learning' gave way to 'blurred learning'. Yeah, right.

I find it difficult to give 'blended learning' the same respect I give, say, blended whiskey which is produced by the highly skilful blending of between 20 and 50 different 'single' malt and grain whiskies—of differing ages and from different regions and distilleries—to create a new brand with its own unique character. The greater the number of component whiskies, the greater the consistency of the resulting blend. If one of the contributing distilleries goes out of business, the blenders can achieve the same end result by

adjusting the blend of the other single whiskies. If only such art, science, and commerce lay behind blended learning.

Personally, I'm much more comfortable talking about the strategic use of learning delivery channels than 'blended learning'. Every enterprise has learning delivery channels—it's a question of identifying them and deciding which to use when. Typical channels include the physical classroom, the virtual classroom, print, e-mail, the telephone, print, coaching and mentoring, EPSS, software simulations, online collaboration, self-paced e-learning, and Knowledge Management channels. Increasingly, mobile or wireless channels are also available. It's clear from this list that learning delivery channels are more than technology channels. Coaching, for example, is a learning delivery channel that can be delivered by phone, e-mail, message boards, Instant Messaging, and face to face.

The Search for the Holy Recipe

In print publications, in online forums, and at learning events, the same plaintive question is heard, 'I'm responsible for delivering a package of blended learning. How should I create the blend?' The question is asked as if there existed a holy recipe capable, like some Hogwartian spell (*Blanda lore!*), of producing the desired effect time after time as long as the incantation is articulated in the right sequence and with the correct pronunciation.

However honest, the question is flawed.

I have heard blended learning dismissed as the Emperor's New Clothes on the basis that all learning—from infancy, through the classroom, and into the enterprise—is blended learning. While that's true, it's also a red herring. The blends of learning we encounter outside organizational learning are almost always accidental or intuitive—which is not to say they are ineffective. It is a different matter to *design* the right combination of learning delivery channels with the goal of improving the performance of a specific task or combination of tasks in a business unit or department. Also, blended learning through infancy and formal education has to do with pedagogy while organization learning has to do with andragogy. The difference is significant.

I have also heard it said that blended learning has its origins as an apology or, worse, a distraction promoted by e-learning vendors in order to take the market's attention away from the apparent failure of e-learning to deliver on its promises. 'Mea culpa, mea culpa', cant the e-learning vendors. 'We got a little carried away there. Of course, e-learning can't do it all. What you really need is blended learning—and here's a solution we prepared earlier.'

There's an element of truth in both these tellings of the genesis of blended learning but neither gets us closer to an answer to the question, 'How should I create the blend?' The only thing that can is hard thinking.

Hard Thinking

Consideration #1. Before asking *how* you should blend learning shouldn't you be asking *why* you're blending learning? How many organizations have thought hard about why they're embracing blended learning? I know some have but I'm reasonably confident when I say most haven't. I believe that for the majority blended learning is a reaction to a disappointing e-learning initiative (We built it and no one came.), having the budget for their e-learning implementation cut as a consequence of current market conditions, or a failure to create the transformation in the training department necessary for e-learning to take root and flourish.

Consideration #2. So why have so many e-learning implementations been disappointing? The excuses could fill a book but it's my contention that e-learning failed to keep the promises it made to the learner and the enterprise because its implementers didn't think hard enough about why they were implementing it. It's more than a contention. According to Linkage Inc, 58 percent of senior managers admit their business implemented e-learning without a formal strategy signed off at board level.¹ You've heard the saying, it's not guns that kill, it's people. I feel the same way about e-learning. It's not e-learning that lets learners down, it's people.

Consideration #3. Unless organizations stop and think hard and in detail about why they're implementing blended learning, chances are they will repeat the mistakes they made with e-learning. Too many organizations, with the encouragement of too many e-learning service and product vendors, invested in e-learning believing it was an off-the-shelf learning solution. It never was; it never will be. Phoning your favourite content vendor, licensing

250 courses, and arranging for the vendor to host them too might be an e-learning implementation but it isn't an e-learning solution. Blended learning isn't an off the shelf solution either. All the challenges that surround e-learning surround blended learning—and more.

Consideration #4. Here's a challenge. Name me one enterprise with an exemplary track record in traditional training that fouled up its e-learning implementation. If the organization was capable of delivering traditional training that was aligned with enterprise requirements, that improved performance, that generated good ROI, it was capable of improving on all those metrics by adding e-learning to its learning delivery channels. A more typical failure scenario is of an organization delivering mediocre traditional training and carrying that mediocrity forward to its e-learning implementation. There's no inherent reason why blended learning shouldn't suffer the same fate.

Consideration #5. Why am I reasonably confident that organizations are not thinking hard enough about why they're embracing blended learning? Because if they were, they would already know how to create the right learning blend. There is no perfect recipe for blending learning, there is only the selection of learning delivery channels that best meets your business and learning requirements. So first principles first: understand your requirements.

Devising a Strategy

So how does hard thinking turn into a strategy for blended learning?

In an article entitled *A Bulletproof Model for the Design of Blended Learning*, Frank Troha offers a straightforward and practical process:

1. understand the true scope and nature of your project;
2. gain the support of all internal stakeholders early in the process;
3. efficiently and accurately communicate project scope and requirements to potential providers;
4. hire the best provider for the job; and
5. confidently manage and monitor project tasks to ensure success.²

Of course, what really matters is Step 1—and the quality of that step will be in direct proportion to the quality of the learning department's relationship with the business. Unless you have a deep understanding of the business requirement and context, and have assured yourself that it can be achieved through learning—as opposed to, for example, better tools or rewards schemes—there is no way you can make an effective selection of learning channels.

Here are the elements that you need to think hard about in order to devise a useful channel selection strategy:

1. Business objectives
2. Speed to market
3. Subject matter
4. Learner base
5. Instructional Design
6. Shelf life

7. Practical constraints
8. Cost parameters
9. Technical infrastructure
10. Channels available to the learner base

Enterprises also need to think about the nature of the blend. Is every course delivered through multiple learning channels? Or does the blend exist across multiple courses each delivered through a single channel? Either way, why is that approach being adopted?

Requirements are Like Enterprise Fingerprints

Some organizations have a blended learning strategy that I describe as all-content-in-all-channels. They see their role as learning publishers using every channel in the enterprise to deliver content and leaving the nature of the blend to the learner. I've seen this described disparagingly as 'buffet learning'—but leaving channel selection to the learner isn't always a lazy solution.

Employees of The Dow Chemical Company are some of the busiest learners in the world. Driven by compliance requirements, they clocked up 630 000 hours of learning in 2001 with about 7 000 course completions every week—and that's just the activity in Dow's e-learning channels. Dow has learned that the combination of shift work in its factories and the need for its employees to meet and renew compliance requirements means that the more channels it uses to deliver a course, the greater the take up. There are no value

judgements about channels—at Dow, access is the driver for blended learning.

The Royal Bank of Scotland aspires to all-content-in-all-channels for a different reason. The bank sees the nature of work changing and with it the relationship between the bank and its employees who, increasingly, will work remotely and virtually. The bank's aim is to provide as many learning delivery channels as possible in order to cater to the increasing diversity of employees' lifestyles.

Before it was acquired by IBM Global Consulting, PwC Consulting developed a blended learning strategy based on the value of client accounts. The more valuable the account, the more PwCC was prepared to invest in delivering learning. In practice that means consultants working on the most valuable projects received the most instructor-led learning because face to face learning is the most costly to deliver. *Project-driven learning* is also delivered through Web collaborations and self-paced e-learning courses. On the other hand, *career-driven learning* is only sometimes delivered through instructor-led channels and mostly through e-learning courses. *Interest-driven learning* is neither tracked nor charged for and is delivered solely through the consultancy's self-paced e-learning channels.

For years, IBM itself has been leveraging its learning delivery channels through what the company calls its 4-Tier Learning Model. Tier 1 is about learning from information and uses online channels to deliver performance support and reference materials, for example, Web-based lectures, books, conferences, pages, and video on demand. Tier 2 is about

learning from interaction and delivers interactive learning, simulations, and games through Web and multimedia channels. Tier 2 content includes self-paced, self-directed learning objects as well as coaching and simulations. Tier 3 is about learning from online collaboration. It delivers virtual classes, e-labs, collaborative sessions, live conferences, and teaming across the Web. Tier 4 is about learning from co-location and uses face to face channels to deliver experiential learning in the form of learning labs, mentoring, role playing, coaching, and case studies. The learning is accumulative with the sequence always moving from Tier 1 to Tier 4. IBM has applied the 4-tier approach in its well known Basic Blue for Managers course with notable success.

No one of these approaches is right and none are wrong. Each has been designed to meet specific enterprise learning needs—and that's the way it should be.

Learning Channels Don't Map to Content Types

Learning channels don't map directly to content types. Instead, the most effective approach to channel selection is strategy.

For example, it's generally accepted that e-learning can make a valuable contribution to homogenizing the input standard of learners attending a face to face learning event—regardless of content types. By creating prerequisite online evaluations and learning, content designers can be confident that every learner walking into the classroom is on a level playing

field. Gone are the days when learners with too little pre-knowledge slow down the progress of the whole class while learners with a surplus of pre-knowledge feel they are wasting their time.

It's also generally accepted that following up a face to face or online event with coaching—whether using online collaboration tools, e-mail, or telephone—can help the learner apply what has been learned which, after all, is the ultimate learning objective.

Equally, following up face to face and online learning events with peer to peer collaboration can both help the learning stick and facilitate the development of personal networks through which learners will continue to learn and share knowledge long after formal events have ended.

I am much less comfortable with the notion that learning channels can map directly to either content types—nor can I find any evidence that they can.

There is a notion that only face to face learning can change settled behaviours and, it must follow, distance learning is only appropriate for task- or procedure-based learning, for example, learning computer skills. Using Robert Gagné's taxonomy of learning, you could say that face to face learning is the only appropriate delivery channel for learning about Attitudes and Cognitive Strategies while distance learning is a suitable channel for learning about Verbal Information and Intellectual Skills.

It's not true. Controlled comparisons between distance and face to face learning have been made since the 1940s and a clear majority of these

have shown that at worst there is no significant difference between distance and face to face learning regardless of content.

What is true is that it takes uncommon imagination and creativity to create distance learning engaging and powerful enough to change behaviours. As a result, most learning managers have never been exposed to learning content capable of changing behaviours and wrongly assume it does not and cannot exist.

Unimaginative distance learning cannot change behaviours but neither can unimaginative classroom training. What determines the effectiveness of learning is the quality of the instructional design and content not the choice of channel.

Learning Channels Don't Map to Learning Styles

Another notion I encounter regularly holds that learning channels map directly to learning styles. Channel selection then becomes based on catering to the learning styles of the learner base. I can understand the instant appeal of this approach but I can't find any evidence to support it.

Learning styles are themselves a problem area. What are they? Building on David Kolb's Learning Style Model, Honey and Mumford offer us four learners: the Activist, the Reflector, the Theorist, and the Pragmatist. Howard Gardener offers us eight multiple intelligences: Verbal/Linguistic, Logical/Mathematical, Bodily/Kinesthetic, Visual/Spatial, Musical, Interpersonal, Intrapersonal, and Naturalist. Other people talk about VAK, a

simpler approach that maintains our overall learning preferences are visual 60%, auditory 30%, and kinesthetic 10%. The Grasha-Riechmann Student Learning Style Scale, designed for universities, identifies three personality dimensions: competitive/collaborative, avoidant/participant, dependent/independent. And so on.

What you will not find is any of the experts in the area arguing that each of us has a single learning style or that our learning styles remains fixed. Most experts adopt the same position as Peter Honey who maintains that learners need to adopt all styles of learning in order to learn effectively. Honey is sceptical about a single right style for each learner: ‘Teaching exclusively to an individual's preferred style, if indeed it was possible, would undoubtedly be convenient and comfortable for the learner. But so much of what is involved in effective learning would be missing—having to struggle, taking a risk, picking yourself up after a setback and having another go, and learning from failure and mistakes.’³

David Kolb agrees: ‘Tracking of students in education by whatever criteria is generally a bad idea, as it tends to stigmatize and stereotype learners, preventing them from developing their full learning potential. It is more effective to design curriculum so that there is some way for learners of every learning style to engage with the topic, so that every type of learner has an initial way to connect with the material, and then begin to stretch his or learning capability in other learning modes.’⁴

Howard Gardener is very pragmatic about the application of MI: ‘My own teaching has changed slowly as a result of multiple intelligences because

I'm teaching graduate students psychological theory and there are only so many ways I can do that. I am more open to group work and to student projects of various sorts, but even if I wanted to be an “MI professor” of graduate students, I still have a certain moral obligation to prepare them for a world in which they will have to write scholarly articles and prepare theses.⁵

I have very practical concerns about the direct mapping of learning styles to learning delivery. Suppose we test a learner online and find, in Gardner's terms, she had a Musical or Naturalist intelligence. How would that help us as designers and deliverers of learning to help her get more out of Microsoft Outlook or to change her behaviours towards enterprise IT security?

I was once involved in the development of a self-paced e-learning course about project teamwork. The subject matter expert was convinced the best way to exemplify teamwork was through the album 'Kind of Blue', Miles Davis's 1959 jazz masterpiece. There were serious issues around copyright clearance for the music and photos of the legendary musicians. More importantly, many people on the development team were not convinced that jazz music was a robust analogy for teamwork in the enterprise. The SME remained adamant it was. On reflection, he almost certainly had a Musical intelligence which was not present in the rest of the development team and, presumably, the learner base. Would learners who disliked jazz have been engaged or distanced? Would the substantial cost of copyright licences delivered good ROI?

I don't deny learning styles exist and I believe it is probably a good thing for each of us to have an appreciation of the style of learning with which we are most comfortable. What I don't think we can do is to map learning channels directly to learning styles, for example using Gardener's intelligences to insist that all learners with an Interpersonal intelligence need to learn through collaborative channels while all learners with an Intrapersonal intelligence need self-paced e-learning.

Neither should we glibly provide a spoken narration with all text displays in order to cater to both auditory and visual learning preferences. To do so flies in the face of research into Cognitive Load Theory which shows that delivering the same content simultaneously in two channels impedes assimilation.

Relentless Push of Technology

My crystal ball doesn't work any better than anyone else's but one thing is certain: the number of content delivery channels available for learning will only ever increase—and all the new channels will be distance learning channels. IBM Learning Services believes that online collaborative learning will become the dominant form of e-learning while face to face learning will decline both proportionately and in absolute terms but never disappear. That makes sense to me. More and more, face to face learning will be reserved for special circumstances—whether 'special' means critical

learning, value-driven learning (as in PwC Consulting Consulting's approach), or perhaps learning in the board room.

Universities understand this. In the US, almost 90 percent of large universities (more than 10 000 students) provide distance learning. Gerhard Casper, the outgoing president of Stanford University, remarked: 'How Internet learning will shake out, I really do not know. But I am utterly convinced that over the next ten years we will see shifts from in-residence learning to on-line learning.'⁶

So not only has blended learning been around for as long as learning has been around but its future is assured. In that context, it's important to understand is that placing a higher value on the effectiveness or desirability of face to face learning over the effectiveness or desirability of the increasing number of distance learning channels is wrong thinking. There will be situations where face to face learning has a strategic value but as every aspect of our lives become permeated by media, face to face will become proportionately less significant. It's already happened outside learning. How many people go to the theatre compared with the number of people who watch drama in the cinema, on broadcast and cable television, or packaged, that is, on DVD and VHS?

Today when a seven or eight year old child forgets a homework assignment at school, they know one of their classmates will fax it them. Often primary school children have no text books for key subjects like science but author their own notebooks based on their experience in the classroom and, as importantly, their personal research using books, CD-

ROMs, and the Internet. Adolescents have adopted SMS text messaging as their communication channel of choice. Instant Messaging, a real-time peer to peer channel, has been awarded 'cool' status not only by adolescents but by masses of enterprise employees. Digital radio and television—whether broadcast or delivered by cable—have dramatically increased the number of delivery channels around us. While G3 telephony is currently suffering a protracted and painful labour, one to one, one to group, and group to group two-way wireless channels are here to stay for both voice and data communications. The emergence of plastic LCD screens so thin they can be rolled into a tube portends a new generation of e-books with as much or greater portability than paper books.

The more delivery channels there are, the less centralized our lives, our society, and our learning becomes. Learners in organizations will have an increasing expectation of a channel-rich screen-based learning environment.

With more and more channels available, the challenge of channel selection becomes increasingly critical and difficult. The idea that there can be a formulaic approach to channel selection—a set of rules to cover every situation—is simplistic and adrift.

Today, the reality of blended learning is often learning delivered through three channels: the classroom, the virtual classroom, and self-paced online courses—and already learning managers and designers are struggling with channel selection. What is needed for the future is a strategic approach not a set of rules. At the heart of the approach lies the need for a deep understanding of the business and learning requirements. Only through that

understanding can a strategy for delivery channel selection emerge. Just don't expect it to be easy. All together now: *Blanda lore!*

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