Blended learning policy and implementation: Introduction to the special issue

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ARTICLE INFO	ABSTRACT
	There is a need for research investigating why blended learning, despite its many inherent advantages, has not been scaled up successfully in very many institutions. This special issue on blended learning policy and implementation brings together writings of eight prominent international researchers who address this issue from different perspectives. The need for alignment of goals at all levels of the academy from senior administration through to students as well as the necessity for an advocate at the early stages of implementation are identified as two major prerequisites for successful scaling up of blended learning. Directions for future research are offered.

1. Introduction

The idea for this special issue on blended learning policy and implementation arose from discussions among the directors of COHERE (http://cohere.ca), a collaboration of Canadian universities focusing on the research and practice of blended and online learning within higher education. Directors expressed concern that, even though the literature suggests that blended learning offers many advantages for higher education, there has been difficulty scaling it up on campus. Among the advantages frequently cited is that students enrolled in blended classes on the whole achieve higher than their counterparts in fully online or face to face courses (Means, Toyama, Murphy, Bakia, & Jones, 2010). Student satisfaction also tends to be higher in blended courses when compared to traditional lecture courses (Martinez-Caro & Campuzano-Bolarin, 2011), and faculty report having their teaching reinvigorated by the experience (Owston, Garrison, & Cook, 2006). A further advantage is that institutions are able to increase their enrolments – and income – without the need for new construction because classroom space can be better utilized (Dziuban, Hartman, Cavanagh, & Moskal, 2011). From these discussions emerged the call for a special issue that would bring together a collection of articles by leading researchers who had studied blended learning policy and implementation issues. Questions addressed in the call were why have so few institutions formally adopted the blended approach? How can institutions scale up the number of blended course offerings? Are the cost savings or cost avoidances substantial enough to warrant an institution's strategic investment in blended learning? What institutional policies and practices lead to successful implementation and what are the barriers that hinder institutionalization of blended learning? What follows in this special issue is a collection of eight insightful articles from researchers in Australia, Canada, Europe, and the United States that address these questions and related issues.

In the process of establishing the call for the special issue a definition of the term blended learning was implied by stating that it is an instructional approach that substitutes online learning for a portion of the traditional face-to-face instructional time. This definition was derived from the Sloan Foundation Consortium that sees blended learning as lying along a continuum between fully online courses and fully face-to-face courses (Allan & Seaman, 2006). In other words some of the face-to-face time in traditional courses is substituted with online activities. Generally speaking authors of the articles in this issue discuss blended learning implementation and policy from this definitional perspective. On the other hand, a few authors did not address the substitution aspect of blended learning but were closer to Garrison and Vaughan's (2008) notion of blended learning as being the thoughtful integration of face-to-face and online learning. Regardless, the collection of articles in this issue do provide compelling evidence of how and under what conditions blended learning can be implemented at scale.

2. Overview of articles

The first article in this issue is a study by Graham, Woodfield, and Buckley of six institutions at varying stages of blended learning implementation. The researchers conducted interviews of senior leaders who had first-hand knowledge of blended learning initiatives on their campus. They then classified the institutions into one of three stages of implementation: Stage 1 awareness/exploration; Stage 2 adoption/early implantation; and Stage 3 mature implementation/growth. Interview data were analyzed on three dimensions: strategy, structure, and support. Strategy included matters related to policy and degree of implementation, structure dealt with technological, pedagogical, and administrative, and support consisted of issues related to how an institution facilitates blended learning design. The resulting matrix provides an illustration of how institutions evolve on these dimensions as implementation matures. For example, in the early stage of implementation

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there is a need for an advocate who convinces others of the value of blended learning. The advocate helps spread the concept of blended learning to other academic units. Then as the blended learning begins to mature, more robust administrative systems are required to support the initiative.

Moskal, Dziuban, and Hartman next describe lessons learned from the scaling up of blended learning at the University of Central Florida over a 16 year period. The authors contend that for blended learning to successfully scale up there must be an alignment of institutional, faculty, and student goals. This alignment cannot be achieved without dialog among all stakeholders on campus. For example, senior administrators may not be familiar with the concept of blended learning and faculty may be suspicious of top-down initiatives that impact teaching and learning. A robust technical infrastructure has to be in place as well as convenient and sufficient technical support for faculty and students. Faculty also need to have access to course development support and appropriate policies have to be in place to cover issues such as intellectual property and workload. Additionally, the authors state that a key component to their success is the establishment early-on of central data collection procedures to monitor success and inform policy on faculty development and support, so that the institution does not have to rely on anecdotal evidence alone. These data are supplemented by encouraging faculty to engage in their own action research on their teaching and to publish their findings.

Garrison and Vaughan's article documents the institutional change and leadership associated with the implementation of blended learning. Using two case studies as illustrations, they demonstrate how transformational change is predicated on committed collaborative leadership that engages all levels of the institution. They found that the institutional vision and mission must also be linked for the initiative to take hold. Other key components of the change process are taking a community approach to faculty development where faculty provide mutual support and providing faculty with the opportunity to reflect upon and share their experiences teaching in a blended format.

Carbonell, Dailey-Hebert, and Gijselaers studied a faculty-initiated blended learning project at their institution in order to understand the bottom-up change process. They report that faculty involved in the course re-design process must share a common vision to enable them to work together. The vision must be consistent with the institutional vision, but it should not overly restrict their freedom to choose how it should be implemented. Secondly, faculty must put aside their own personal needs and aspirations and be committed to the common goal of realizing the vision. Thirdly, they found that the project leader needs to be able to pull the team together and be able to convince stakeholders external to the project of its value. Even though these conditions are necessary for success, the researchers argue that bottom-up change cannot occur without a supportive senior administration and an institutional culture that values and supports pedagogical experimentation. They conclude by stating that bottom-up change can be complex and slow but it will lead to sustained change.

Owston, York, and Murtha took a different approach to their study than other researchers in this special issue. They employed an established institutional framework at their university to study the extent to which its four key criteria were being met, rather than the approach used by others of discovering implementation factors that emerge from their data. These factors were the ability of blended learning to: (1) enable the university to respond to pressure to increase enrolment; (2) provide a better learning experience for commuter students; (3) increase student engagement; and (4) improve student learning. They surveyed students on their perceptions of how well blended learning supported these goals and related these findings to student course grades. A remarkably strong relationship was found between perceptions and grades. Compared to low achieving students, high achievers were the most satisfied with their blended course,

would take one again, and preferred the blended format more over fully face-to-face or online. High achievers also found blended courses more convenient, more engaging, and they felt that they learned key course concepts better than in other traditional face-to-face courses they have taken. An implication of Owston et al.'s study is that low achievers may not be able to cope with the blended environment as well their high achieving peers. Therefore, they recommend that when scaling up blended learning, institutions may want to consider offering students a choice of whether to enroll in blended or fully face-to-face course sections where feasible, especially in subject areas that students find difficult. Another option might be to provide low achievers with stronger academic supports for blended courses.

O'Dowd discusses how telecollaboration – the online intercultural exchanges between classes – can be used to enhance traditional campus-based foreign language instruction. He identifies institutional barriers that instructors face when organizing exchanges and describes how these barriers may be overcome. The study is based on further analysis of data collected from over 300 university lecturers and students engaged in telecollaborative projects in European as well as some non-European universities. Five strategies for success were identified ranging from emphasizing trust and steady partnerships to ensuring students are awarded credit for their activities to linking telecollaboration to broader international activity at the institution.

Taylor and Newton examine another variation of blended learning called "converged delivery" at Southern Cross University in Australia. The goal of converged delivery is to provide a quality learning experience to students whether they take their courses on campus or online. Their research pointed out the necessity to define the concept of converged delivery more clearly at the institutional level as even instructors who were teaching in this mode were uncertain what converged delivery entails. The issue of the need for clear institutional level definitions of blended learning was also stressed by Moskal et al. in their article in this issue. Additionally, Taylor and Newton stress the critical importance of alignment of institutional goals with other stakeholders' goals on campus. Related to this is the need for all stakeholders to engage formally as well as informally in discussion to arrive at a shared vision.

A critical issue not addressed sufficiently in the literature is the cost of blended learning and the extent to which students are willing to pay above and beyond their regular tuition for a blended experience. In the final article of this special issue, Taplin, Kerr, and Brown tackle one dimension of the costing of blended learning by analyzing the monetary value students place on being able to download recorded class lectures. Their finding that students are willing to pay approximately $30 (Australian) for access to iLectures provides institutions of higher education with a benchmark for planning costs associated with implementation of blended learning. The authors suggest that this amount will help institutions recover their costs of providing iLectures. Although the study quantifies what students are willing to pay, the authors do not necessarily endorse the charging of a fee for lecture recordings but they point out that the study provides evidence of the value students place on blended learning.

3. Concluding remarks

A theme that comes through clearly in the collection of articles is that for blended learning to move to scale institutional goals must align with those of faculty as described by Moskal et al. This view is reinforced by Graham et al.'s study about the need for an advocate or champion to initiate and sustain an initiative, particularly in the early formative stages, and by Garrison and Vaughan who stress the importance of blended learning being supported by institutional vision and mission. Carbonell et al.'s research adds to this the importance of faculty involved in course re-design having a shared vision

and to put aside their personal aspirations and needs for the common cause of implementing blended learning. Although the notion of alignment of institutional goals and coherence is not a new concept in the institutional change literature (e.g., Goldman, 2005), what these articles affirm is that introducing blended learning into the academy is not unlike introducing any kind of innovation into existing organizations.

The articles in the special issue raise a number of questions worthy of future research. For example, given that goal alignment is a critical factor in scaling blended learning, what processes and strategies facilitate goal alignment? Are there different strategies for working with faculty as opposed to academic administrators and what ones are effective in facilitating alignment with these two groups? What is the role of the blended learning champion in the goal alignment process and what happens if the person leaves the institution? Are there subject areas where blended learning strategies can be implemented more readily? Another intriguing issue was raised by Owston et al. They suggest that academic ability is a critical factor in determining the success of students in the blended environment. Assuming that is the case, research is needed to find out what kinds of supports and services low achieving students require in order to succeed in blended environments. Are these supports and services different than the typical tutorial assistance provided in many university courses? How does subject matter difficulty affect success? Their study also suggests the need to consider level of achievement as a factor in studies comparing blended learning with other instructional designs to see if Owston et al.'s hypothesis can be supported.

A further set of questions arise from Taplin et al.'s study on costing of blended learning. Many institutions levy a student technology fee to help defray the added cost of blended or fully online learning and their study sheds some light onto the monetary value students place on downloadable lectures. Further research is needed to examine the relative monetary value students place in web-enhanced, blended, and fully online courses themselves. Information of this nature will guide administrators when planning blended learning implementation. Further studies in a variety of settings are also needed to analyze cost avoidance by not having to construct additional classrooms due to blended learning. The only solid institutional data currently available come from the University of Central Florida (see Hartman, 2010); therefore data are needed from different institutions that have been able to expand enrolment with blended learning while avoiding building new classrooms.

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