

The Pennsylvania State University

The Graduate School

College of Education

**SUCCESS FACTORS IN BUILDING ONLINE EXECUTIVE DEVELOPMENT
PROGRAMS IN THREE UNIVERSITIES: A COLLECTIVE CASE STUDY**

A Dissertation in
Workforce Education and Development

by

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Submitted in Partial Fulfillment
of the Requirement
for the Degree of

Doctor of Philosophy

May, 2013

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Abstract

The purpose of this study was to investigate the process used by three top-ranked university Executive Education Departments in the United States to develop online program portfolios. Using the conceptual framework of the Soft Skills Learning Triangle to guide the research, this study provides direct insight into the design process used, as well as strategic insight into why universities chose to enter the online market and how they went about building the business case within their university to support the venture.

This study used the comparative case study method to answer research questions about how technology is being used in executive education, as well as how the online portfolio was developed (who were the key stakeholders and what roles did they play, what tools were used to build the online community of learning, and what was the program design process). To answer these questions, interviews within each university executive education department with relevant individuals were conducted, documents were collected and reviewed, direct observation of programs were completed, and physical artifacts were analyzed.

Based on the study, the researcher concluded that three different development models were used: (1) self-created (using only internal university resources), (2) partnership (partnering with an external online education company), and (3) blended (using internal university resources supplemented with external contract partners when appropriate). Although different, all three models included a research phase and a design phase, which are described in detail. Additionally, lists of the technology used and stakeholders and their roles are discussed. The ideas of asynchronous learning and creation of online communities of learning are also explored.

Findings from this study have a number of important implications for both researchers and practitioners in the executive education field. For researchers, this study lays the groundwork for additional, necessary research to be completed as new university providers enter the market. For practitioners, this research provides a template for the development of strategic plans for expansion into the online market. It also shows that the online executive education market can be reached successfully using resources available to any university with a small budget and sufficient determination.

Table of Contents

	Page
List of Tables	viii
List of Figures	ix
Chapter 1 Introduction	1
Practical Rationale	2
The Problem.....	3
Significance of the Study	4
Limitations	4
Assumptions.....	5
Definition of Key Terms	5
Conceptual Framework.....	6
Chapter 2 Literature Review.....	8
Purpose.....	8
Historical Perspectives: Executive Education	8
Historical Perspectives: Online and Blended Learning Method.....	10
First Generation e-Learning vs. Second Generation e-Learning	11
Creating Successful Online and Blended Executive Education Courses.....	15
Executive Education Today and Tomorrow	27
Corporate Distance Education Today and Tomorrow	29
Case Studies: Using Blended Learning Techniques for Executive Education	32
Current Research: Using Online Learning Methods for Corporate Training	40
Chapter Summary	48

Chapter 3 Methodology	50
The Problem.....	50
Study Design.....	50
Conceptual Framework.....	52
Sampling Strategy.....	53
Case Study Protocol.....	54
Data Collection	54
Instrument Design.....	55
Data Analysis	55
Preparing for data analysis.....	56
Coding.....	56
Within-case analysis.	57
Cross-case analysis.	57
Verifying the quality of the study.	58
Role of the researcher.	60
Human subjects approval.....	61
Chapter 4 Data Analysis	62
University A.....	62
Case context.....	62
Within-case analysis.	66
University B	79
Case context.....	79
Within-case analysis.	83

University C	93
Case context	93
Within-case analysis.	98
Cross-case Analysis	113
Research question 1: How is technology being used in online executive education programs?	114
Research question 2: How was the online, non-credit program portfolio developed?	115
Chapter 5 Study Summaries, Conclusions and Recommendations	118
Study Summaries	118
Conclusions.....	120
Research question 1: How is technology being used in online executive education programs?	120
Research question 2: How was the online, non-credit program portfolio developed?	122
Recommendations.....	126
For future researchers.	126
For practitioners.....	127
References.....	128
Appendix A Case Study Protocol	134
Appendix B Interview Guide	136

List of Tables

Table	Page
2.1 Perceived Advantages and Disadvantages of a Blended Learning Model from Three User Groups	34
2.2 Learning Outcomes when using a Blended Learning Model versus Traditional Learning and E-Learning for Employee Training in 34 Portuguese Organizations	47
2.3 Learning Outcomes when using a Blended Learning Model versus E-Learning and No Training to Develop New Real-World Skills in Employees	48
3.1 The Link between Research Questions and Interview Questions	55
4.1 The Online Executive Education Programs Available at University A	64
4.2 The Online Executive Education Programs Available at University B	81
4.3 The Online Executive Education Certificate Programs Available at University C	95
4.4 The Online Foundation Courses for Global Business Available at University C	97
4.5 Cross-Case Variable Analysis: How Technology is being used in Three University Executive Education Departments	114
4.6 Cross-Case Variable Analysis: Stakeholders and Role as Identified by Three University Executive Education Departments	115
4.7 Cross-Case Variable Analysis: Tools Used to Developing an Online Community of Learning as Identified by Three University Executive Education Departments	116
4.8 Cross-Case Variable Analysis: Program Research and Design Process used to Develop the Online Program Portfolio as Identified by Three University Executive Education Departments	117

List of Figures

Figure		Page
1.1	The Soft-skills Learning Triangle (SLT), a model used to describe how technology can be used in executive development learning situations	7
2.1	Differences in characteristics and design principles between first generation e-learning and second generation e-learning	15
2.2	The human-centered program design evaluation model used by online course developers to create online programs that are well received and effective for online learners	19
2.3	The Soft-skills Learning Triangle (SLT)	22
2.4	The Cognitive Apprenticeship model for online executive education learning experiences	25
2.5	The Problem Centered Approach model for online executive education learning experiences	26
2.6	The PNC blended learning program for developing needed competencies in newly hired employees	33
2.7	The EES distance learning design process	38
3.1	Study schematic for this collective case study	52
3.2	The Soft-skills Learning Triangle (SLT)	53
4.1	The University A online executive education program portfolio development process	76
4.2	The University B online executive education program portfolio development process	90
4.3	The University C online executive education program portfolio development process	108

Chapter 1 Introduction

Over the past 70 years, executive education has moved from a perk that top management receives (a weeklong trip to Palm Beach to golf and network) to a true adult learning experience. As corporations grow and change, so must their workforce, and herein lies the ultimate goal of executive education. Through research and conversations with individuals both here in the United States and abroad, executive education's need to include more online content to be competitive in tomorrow's business market has been uncovered. This trend has been emerging over many years and for many reasons. Smaller workforces, less money to spend on developing those workers, the growth of the small business industry, technology driving us to become an adaptive society; all of these reasons speak to the necessity to teach adults in new, adaptive, convenient, and cost-effective ways.

To further support the need for and importance of this research topic, the researcher has met with and discussed the future of executive education with select experts. It was uncovered in a discussion with A. Vicere, one such expert, that executive education is moving towards an online format; the question is not whether it will happen, but how long the fuse is before it does (personal communication, October 18, 2010). As this move happens, it will be important for members of the executive education industry to learn from those who have gone before us, moving their conventional face-to-face educational experience to an online and blended format.

A few universities in the United States have begun to include online education in their executive education catalog. In this research, the researcher has completed a case

study analysis of three such universities and the factors that have made their new online product launches successful.

It is important to remember that this research focused on executive education and its move to online and blended formats. While much research exists on how to move for-credit college courses to an online format, the research around non-credit education is limited. This research was designed to open the discussion from standard college courses being delivered online to the more robust world of executive education and workforce development.

Practical Rationale

As the world of business and our understanding of it changes, employee learning cannot be static. In order for executive education providers to successfully compete in today's global marketplace, they too will need to develop new ways of thinking and new ways of acting. As far back as 1997, researchers were studying what the new face of executive education would look like. Vicere (1998) noted "a trend toward shorter, large-scale cascaded programs involving staff at multiple levels of the organization" (Project overview section, para. 1). Vicere (1998) also noted "a perception that technology and distance delivery will play a more critical role in the future of executive education and leadership development" (Project overview section, para. 2). McCrea (2008) agrees that executive education will need to change, and by doing so will remain an important part of employee success. She also notes the need for online education and new ways of offering executive education (McCrea, 2008). Branon, Beatty, and Wilson (2001) also speak to the importance of online education for both universities and corporations when considering delivery methods for executive education.

The need for individuals who have experience and expertise in the area of online education in the executive education market presents challenges of its own. “Online teaching and learning has been in transition for its entire existence” (Beatty & Ulasewicz, 2006, p. 36). Finding subject matter experts (SMEs) who know instructional design and are able to lead teams in building appropriate programs for executives is a challenge (Beatty, Branon, & Wilson, 2001).

It is the belief of the researcher that these changes in the workplace and executive education show a true need for experts who are willing and able to lead non-credit education in this new and exciting direction. As with any new venture, many questions exist, but there are a few pioneers who are starting to dabble in the theory and practice of delivering online and blended executive education courses. It is by researching three such pioneers that this research has started to build a body of knowledge around what it takes to be a successful executive development leader of tomorrow.

The Problem

The purpose of this study was to investigate the process used by three university executive education departments in the United States to develop online executive education portfolios. Specifically, the research questions include:

1. How is technology being used in online executive education programs?
2. How was the online, non-credit program portfolio developed?
 - 2.1 Who were the identified stakeholders, and what roles did they play?
 - 2.2 What tools were used to build the online community of learning?
 - 2.3 What was the program design process from the beginning to the time the program was delivered?

Significance of the Study

This study was designed to look specifically at the development of an online, non-credit program portfolio within university executive education departments. Much of the existing research in the area of online program development lies in the area of for-credit programming, i.e. college courses designed for traditional students. This study was specifically designed to look at what was necessary for launching a successful non-credit program portfolio, designed for adult learners who are not seeking college credit. Instead, these individuals were looking to develop the skills needed to be successful corporate leaders (Beatty, Branon, & Wilson, 2001).

Limitations

While many universities in the United States are currently exploring the use of online and blended learning methods in traditional teaching, fewer are using this technology for delivery of executive education. This causes a limitation in that there are few experts currently practicing successfully in the non-credit online market.

Additionally, as an emerging industry, the amount and speed of change in the industry is large. While the aim of this research was to capture the best practices of the industry, constant change in both the technology used and acceptance of this method of executive development should be noted.

Regarding the use of the case study method, the researcher looked at three university providers of online executive education. It should be noted that these three should not be considered the only players in the market. Other universities, as well as for-profit entities, are currently active and their contributions will not be considered here.

Assumptions

By using the case study method, the researcher has made the assumption that the information gathered from the individuals in this study is a thorough and complete look at the development process for online, non-credit learning initiatives in these three United States universities. It was assumed that those who have been chosen to participate in the interviews will give a clear and complete picture of the process. Additionally, it was assumed that individuals who have been chosen to participate in this study possess an appropriate level of understanding of the process that was undertaken within their university to clearly represent the facts.

Definition of Key Terms

Blended learning

“Typically defined as an instructional program offered through a combination of two or more delivery modes, blended learning utilized a variety of approaches, including print-based materials, instructor-led training, and web-based training” (Reece & Lockee, 2005, p. 49).

Executive education

“Courses used to teach managers and executive the skills they need to succeed in corporate leadership” (Beatty, Branon, & Wilson, 2001, p. 249).

First generation e-learning

“First generation e-learning uses the Internet and web-based technologies to deliver conventional educational products and services – such as textbooks, papers, training courses, lessons, and workshops – in a new way” (Morgan & Adams, 2009, p 133).

Pedagogy

Pedagogy can be defined “in a traditional sense to capture principles relating to the science or profession of teaching” (Morgan & Adams, 2009, p 154).

Second generation e-learning

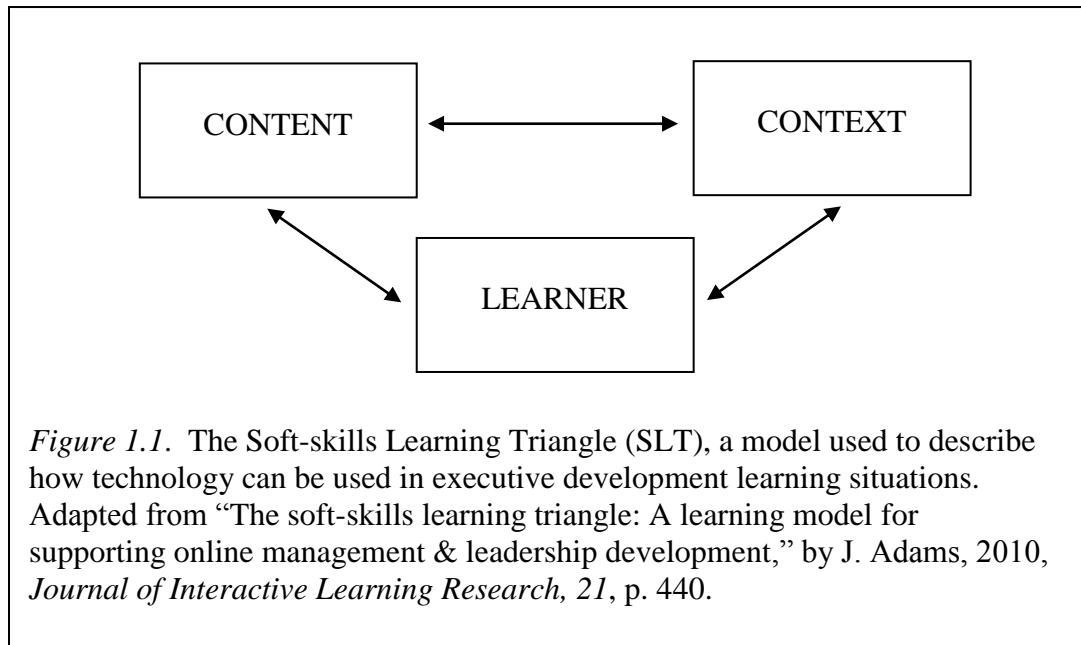
“Second generation e-learning seeks to put the learner in control of the learning. It is based on an adult education model, providing learning resources that the learner can navigate at will to achieve their personal learning objectives... This allows learners to integrate all their learning around personal or organizational learning objectives – such as improved competence and job performance – by drilling down to exactly the kind of learning they need, when they need it.” (Morgan & Adams, 2009, p 133).

Conceptual Framework

The conceptual framework used to guide this research was the Soft-skills Learning Triangle (SLT), as shown in Figure 1.1. The SLT was selected because it was “a model created to help coaches, mentors, and educators understand how web-technologies can be used to support management learning and soft-skills development” (Adams, 2010, p. 437).

SLT emerged as part of a larger action-learning research project – the NewMindsets Management Education Project – where an e-learning system was designed, built and piloted in a variety of organizations. Embedded in the model is a deep understanding of the unique attributes of the web and how the medium differs from other learning modalities and instructional media. It also highlights the challenges in creating learning experiences that go beyond simply delivering thoughts and ideas online to effectively provoking deep reflective learning. This is

particularly relevant when the purpose is to stimulate peoples' ability to think for themselves or to apply what is being learned to their job situations – as is the case in most management skill development initiatives (Adams, 2010, p. 437).



Chapter 2 Literature Review

Purpose

The purpose of this chapter is to provide a review of the related literature and past research studies to give a general understanding of what is necessary to establish a successful e-learning environment. Executive education will also be discussed, building a base of understanding as to how the two concepts interact.

Historical Perspectives: Executive Education

Executive education is not a new concept. In fact, “companies have been using executive development programs for a very long time, dating as far back as the late nineteenth and early twentieth centuries” (Crotty & Soule, 1997, p. 4). From university-designed programs to in-company alternatives, education of employees has been going on for years. In the early days of executive education, university programs dominated, offering functionally based learning opportunities to mature, highly motivated, experienced managers (Crotty & Soule, 1997). These programs almost always focused on the development of the individual manager, helping to make him or her successful in his or her current career and desirable for future assignments.

Crotty and Soule (1997) contend that university-based executive education is an outgrowth of MBA degree programs like Harvard’s which started in 1908, or Wharton’s in 1881. Since these programs were usually two-year, full-time commitments, younger managers were generally targeted for this type of development. The shorter, non-degree options that sprung from these MBA programs, and later developed into executive education as we know it today, were an alternative for older managers who could not afford such a time commitment. Crotty and Soule (1997) note that the root of the

movement was at Harvard, where they began to offer pieces of their MBA program to non-degree students in 5-week segments in the early 1920s. That was followed by their 15 week Second World War production course, teaching managers how to change their production facilities from civilian goods to those needed in war time. After the war, more programs were added and the trend of university-run executive education was established.

Conger and Xin (2000) describe early executive education as “university-based programs or seminars offered by specialized training organizations” where executives were trained in management theory (p. 76). Sessions were mostly case-based learning situations or executive-expert lecture series, with university-faculty-led training focusing on “strategy and functional skills such as finance or marketing” (Conger & Xin, 2000, p. 76). Conger and Xin (2000) also compare early executive education to “abridged MBAs,” given as rewards to senior management (p. 76).

That began to change when GE announced the offering of their 13-week advanced management program in 1956, modeled after Harvard’s 13-week advanced management program. The company designed the program to mimic a university-run program, but added specific components focused directly on the business of GE. They cited cost and the number of people that they wanted to train as reasons for developing this new kind of company run education. Top management at GE saw the value in the university-run education, but thought it would be even more valuable with a GE spin, covering all of the basics covered by Harvard (finance, marketing, personnel) and adding information about GE policy issues, thus beginning the struggle between university run executive education and in-house company-run programs (Crotty and Soule, 1997).

By the early 1980s, this shift in executive education was noted in numerous corporations, and by the early 1990s, the shift had accelerated (Conger & Xin, 2000). With content and focus shifting from the university to companies where organization-specific topics could be addressed, a switch from teacher-centered learning to learner-centered development also became apparent (Conger & Xin, 2000).

Conger and Xin (2000) also note specific trends that will guide executive education for the future. One notable trend that relates to how e-learning can influence executive education is “a shift from functional knowledge to strategic leadership and organizational change” (Conger & Xin, 2000, p. 80). (The different online learning platforms needed in teaching functional knowledge versus strategic knowledge or soft-skill development will be described later in this chapter, when the difference between first generation e-learning and second generation e-learning is discussed.) Conger and Xin (2000) also note that a change in pedagogy that will include “a shift toward action-learning and feedback pedagogies” will be necessary in successful executive education (p. 81). Again, this shift strengthens the argument that second generation e-learning is needed for successful executive education. Lastly, Conger and Xin (2000) describe a need for cascading learning experiences. This idea is also found in second generation e-learning theory.

Historical Perspectives: Online and Blended Learning Method

Strand (2009) points to correspondence courses as one of the earliest forms of distance learning. The written content, sent to individuals through the mail, evolved into cassette tapes and videos. As technology evolved, says Strand (2009), course content was moved to email distribution and then Web 1.0 delivery methods. In the Web 1.0

world, online content was static with little ability for user interaction. Instead, websites were used to stream audio to learners. With the 21st century came the highly interactive Web 2.0 technologies and the “ability to create a highly interactive, collaborative online learning environment” (Strand, 2009, p. 1).

Strand (2009) points to Web 2.0 technologies such as “blogs, wikis, social networking sites, photo sharing sites, and Flash” as the technologies that have provided a platform allowing us to easily “share ideas and data, work collaboratively on projects, and maintain relationship with people from around the world” (p. 3). Of course, for all of these advances, there are also pitfalls.

Failure to use Web 2.0 technologies can result in a lost teaching opportunity, but a failure to use the technology without sound pedagogical underpinning can result in lost learning. Educators need to avoid using technology simply because they can. The goal when using technology should be to enhance the learning experience for all involved (Strand, 2009, pp. 3-4).

First Generation e-Learning vs. Second Generation e-Learning

In looking at the history of e-learning, it is important to make a distinction between first generation e-learning and second generation e-learning. As defined by Adams and Morgan (2007), first generation e-learning is far more technologically driven. Generally, an instructor is in control of the virtual classroom space and a compliance learning model is used. First generation e-learning has its roots, according to Adams and Morgan (2007) in Computer Based Training (CBT), for times “where the need was to use new technology to provide timely and cost effective online instruction, and was effective for that purpose because instruction...was exactly what was needed (where) the aim was

to make the computer the instructor, resulting in an approach that took the traditional classroom instruction model into a virtual environment” (p. 165). From this, we can see how the technologies supporting first generation e-learning were critical. When the aim is to put an existing course content online, it is as simple as “delivering basically conventional educational products and services such as manuals, textbooks, papers, training course, lessons, and workshops in a new way” (Adams & Morgan, 2007, p. 165). This model depends on the instructor to lead the discussion and the class, guiding learners to the right answers in a linear way. It has also been said that this model would not be effective in situations where “the answers to predetermined questions depend on the detailed nature of the problems that have to be addressed, or the contexts in which the skill or lesson being learned is to be applied” (Adams & Morgan, 2007, p. 165).

Second generation e-learning, however, “is based on a learner-in-control pedagogy that is primarily geared to achieving applied, performance-oriented learning” (Adams & Morgan, 2007, p. 166). The pedagogy of second generation e-learning has three basic motivators:

- To “give the learner more control over the learning process in terms of targeting what needs to be learned” (Morgan & Adams, 2009, p. 134).
- To “adopt an action learning focus that encourages learners to bring specific contexts of application to the learning” (Morgan & Adams, 2009, p. 134).
- To tap “the interactive power of web technology to pose questions and create choices leading to a variety of personal learning paths that can help learners reflect on what is being learned and think about its relevance in terms of the situation to which it is to be applied” (Morgan & Adams, 2009, p. 134).

Think of a learning ecology as opposed to a library. The “second-generation” approach has to be designed from the ground up to provide a network of interconnected learning opportunities rather than a library of separate online texts and courses. This allows learners to integrate all their learning around personal or organizational learning objectives - such as improved competence and job performance - by drilling down to exactly the kind of learning they need, when they need it. To create a “second generation” learner-in-control environment, all the content, learning experiences, and underlying technology - including the learning management system and methods of assessment - have to be configured to allow free-flow learning, driven by the learner needs (Adams & Morgan, 2007, p. 166).

There is also a context-based level of soft skills e-learning that cannot be ignored when discussing second generation e-learning.

As we all know, the application of knowledge in soft-skill areas such as leadership and management usually needs to be modified according to the details of the actual situation being faced. The right advice in one situation may be the wrong advice in another. Since it is impossible to specify the details of every situation in which the learning is to be applied, “second generation” systems encourage the learner to bring the context to the learning. They tap the interactive power of web technology to help learners reflect on what is being learned and think about its relevance in terms of the situation to which it is to be applied (Adams & Morgan, 2007, p. 167).

Second generation e-learning is not measured by standardized testing. Instead, the success of second generation e-learning situations can be measured using performance-based testing (Morgan & Adams, 2009). Success is measured “by focusing on practical impact such as evidence of improved skill or work performance, as opposed to a focus on purely conceptual learning and retention” (Morgan & Adams, 2009, p. 135).

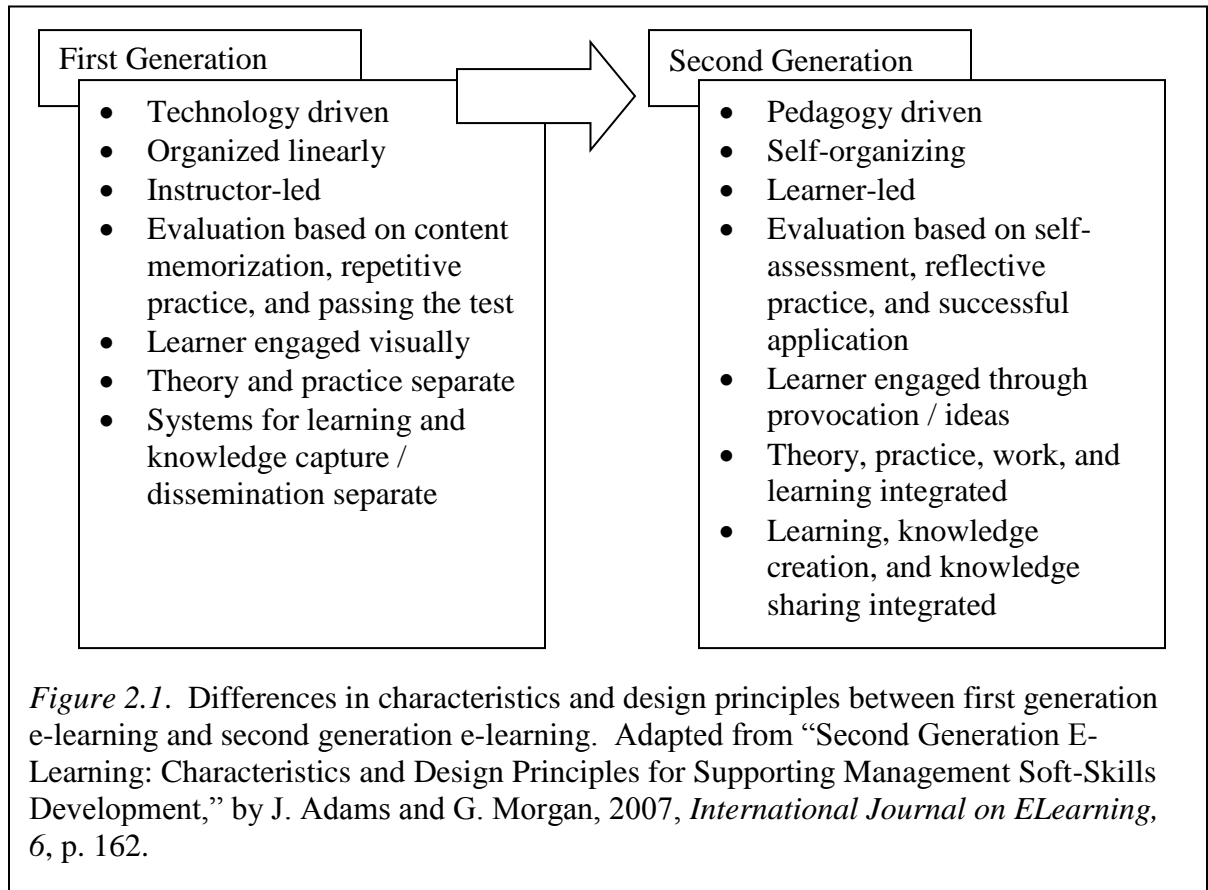
The main differences between first generation e-learning and second generation e-learning (the kind of learning necessary in executive education) as defined by Adams and Morgan (2007) is shown in Figure 2.1. Of course, Adams and Morgan (2007) are not implying that first generation e-learning is in any way inferior to second generation e-learning. They contend that both have their place and can be used to achieve different outcomes. The model that is used needs to match the learning objective that is being sought. For example, Adams and Morgan (2007) note that first generation e-learning is ideal for:

- “Technical skill development” (p. 164)
- “Routinized learning for tasks where conformance is needed e.g., following safety procedure, installing a piece of software, procedures where deviation can be illegal or lethal” (p. 164)
- “Memory based learning / preparing to pass information-based tests” (p. 164)

Times when second generation e-learning is appropriate, according to Adams and Morgan (2007) include:

- “Soft skill development” (p.164)
- “Personal, reflective learning e.g., to do one’s job more effectively, engage in critical thinking, cope with ambiguity, (and in) leadership development” (p. 164)

- Innovation and performance-based learning, addressing complex issues” (p. 164)”



Creating Successful Online and Blended Executive Education Courses

Strand (2009) presents us with three rules to keep in mind when developing e-learning solutions:

- Know the technology and make sure you are using the most correct tools possible (i.e. know the difference between a wiki and a blog and when each would be most appropriate)
- Know what additional requirements will be needed by the learner to use the Web 2.0 technology properly (i.e. special players, different user interface)

- Make sure the technology is “woven into the course in such a way to enhance the learning experience rather than simply being another technological hurdle” (p. 4).

Additionally, Strand (2009) reminds us that the development of an online community is an essential component in developing a successful online learning experience. Pulling from the Sandage Model, Strand (2009) defines the community components necessary for successful online learning as “common purpose, sense of ownership, collaborative learning, sense of greater good, and shared stories or experiences” (p. 2). Regarding each component, Strand (2009) says:

- **Common Purpose:** This is what “initially brings the community together,” examples include “a common class, area of study, or major” (Strand, 2009, p. 2). For this component, “technologies can provide a framework for the creation of an online learning community” (Strand, 2009, p. 4).
- **Sense of Ownership:** This is what “gives longevity or permanence to a community” because “one is more likely to endure a problem or work through an issue if they have a sense of ownership in the community” (Strand, 2009, p. 2). With the wealth of tools available in the Web 2.0 world, strategies here are limitless. One just must know what technology is available and how to apply it to the learning experience.
- **Mutual Gifting:** Also known as collaborative endeavors, this is why we choose to participate in the community. We share ourselves and receive the best of others. “Together we have the potential to produce a better end product than if we were working alone” (Strand, 2009, p. 2). Again, Web 2.0 technologies allow this to happen for online learning. The use of appropriate tools allow for the kind of giving and receiving necessary for this community component.

- A Sense of Greater Good: This is where we “look outside ourselves and outside our community to see how we as a community can make a difference for the greater good of all” (Strand, 2009, p. 3). Web 2.0 technologies allow for this component by allowing for simple interactions with individuals from all over the world using blogs or the like. The work being done can quickly be shared, giving learners this kind of personal satisfaction.
- Shared Stories: From shared stories, “we as a community grow, learn, and experience life together” (Strand, 2009, p. 3). Again, it is not hard to see how Web 2.0 technologies have made this component much more attainable. Easy user interfaces, quick set ups, free availability; all of these elements allow for online community development through the use of shared stories.

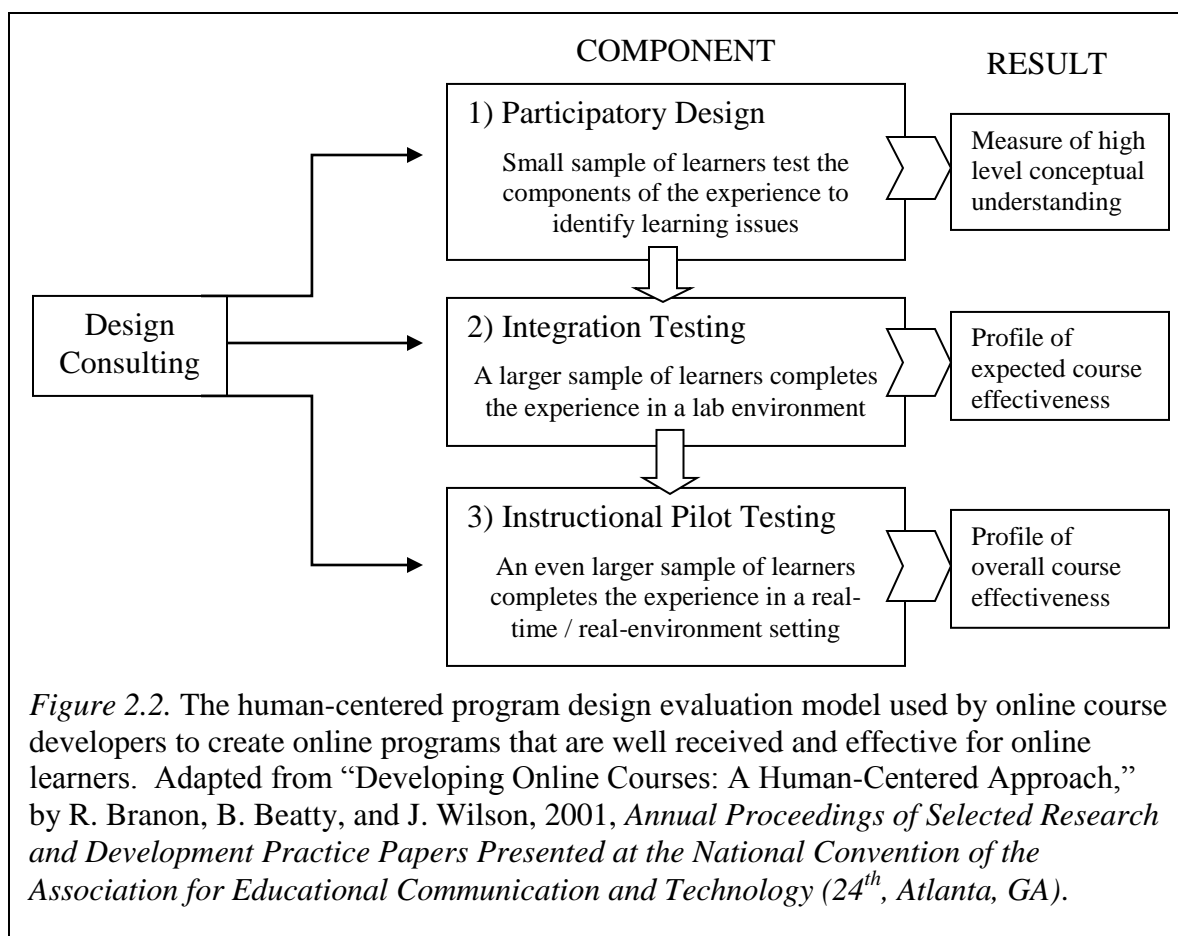
In the end, Strand (2009) reminds us that “it is not the technology that drives the educational process, but rather it is an examination of the educational process to see how the use of Web 2.0 technologies might enhance the educational process and online learning community” (p. 1). Strand (2009) does not suggest simply wrapping Facebook into online programs or seminars, but instead “the use of either an enterprise version of social networking software or a third party host” where learners can get together to “ask questions, seek clarification, or realize they are not alone” (p. 5). All of this to create the community that is necessary for a successful online learning experience.

In addition to forming an online learning community, a successful online education program must also be usability tested to ensure a sound course design. Branon, Beatty, and Wilson (2001) discuss the method of program design testing used by Option Six, an online course development team located in Bloomington, IN. Option Six uses a

Human-Centered Design process to develop executive education learning experiences that meet the soft-skills learning needs of online learners. The process that they use to test the success of their programs is a four component model based on the work of Donald Norman (1998), who defines human centered design as

a process of product development that starts with users and their needs rather than with the technology. The goal is a technology that serves the user, where the technology fits the task and the complexity is that of the task, not the tool (p. 185).

The resulting testing process is depicted in Figure 2.2. Since the program is evaluated by learners from the very initial stages, Branon et al. (2001) note that a high quality, learner-focused experience is developed and the cost of restructuring a faulty course after the fact is eliminated. By incorporating the learner into the design team during the participatory design phase, “most major problems are caught and corrected before too much effort is expended” (Branon et al., 2001, p. 348). Additionally, by bringing learners into the process earlier, the instructional designers are able to work with and learn from the actual learner, improving their design skills for future projects (Branon et al, 2001). But, Branon et al. (2001) note, the expense of creating programs in this manner can be prohibitive. Involving large numbers of individuals from the onset of a program design can be very expensive. The benefit of designing a human-centered development experience, and the benefit of designing what will prove to be a successful program from the time of release, must be weighed against the upfront cost of doing so. In some cases, components of the human-centered program design evaluation model can be used when a lower budget is available.



White and Garrett (2010) discuss a case study of the University of Michigan-Flint as a way to outline how a successful online program is developed. The University ran its first online course in 2000. Since then, the online learning component of the University has increased from “157 individual enrollments in six online course sections (to) 4,591 individual enrollments in 173 online course sections” (White & Garrett, 2010, p. 1). The success of the program is partially attributed to the very systematic way in which they plan and develop their online courses. Special attention is paid to make sure that an online community is formed by making the courses as interactive as possible. To do this, faculty who are involved with online course development first attend a specially designed

faculty training program, focused on creating proper objectives for an online course. Some of the methods developed in the workshop to encourage this type of online interaction include:

- “Create discussion questions that support the learning objectives and provide personalization of responses, as well as induce active participation among class members” (White & Garrett, 2010, p. 2).
- Finding the proper technologies to “convert effective face-to-face course material for use in the online environment” (White & Garrett, 2010, p. 3). Examples include incorporating the use of audio into online courses by using audio welcome messages and audio accompanied power point. Also important is the use of video, voice message boards, and other visual media.
- “Create group activities that increase peer-to-peer interactions as well as increasing the efficiency of online learning” (White & Garrett, 2010, p. 3).

Andersen (2010) also provides tips on how to form an effective online learning experience using the example of a webinar. Andersen (2010) suggests that the discussion leader needs to remember to engage with the audience often, asking a question every 6 to 10 minutes. As in face-to-face learning, Andersen (2010) suggests using very direct questions, making it clear that the facilitator is looking for a response and expects to hear from everyone at some point.

Of course, developing online executive education is more than developing a course to teach technical skills. Adams and Morgan (2007) point out that while first generation approaches have been effective in that arena, “the same approach has not proven effective for developing management soft-skills (p. 157). They argue the reason

for this is that “the methodology for creating e-learning for technical skills training has been carried over to programs for soft-skills development - an area requiring a very different pedagogical approach” (Adams & Morgan, 2007, p. 158). The approach discovered through the Adams and Morgan (2007) research differed from earlier systems in that they paid specific attention to:

- “Starting with the proper pedagogical principles required for soft-skill development” (Adams & Morgan, 2007, p. 161)
- Creating a vision of “a self-organizing ecology of learning experience that would lend itself to a learner-in-control approach for just-in-time learning” (Adams & Morgan, 2007, p. 161).

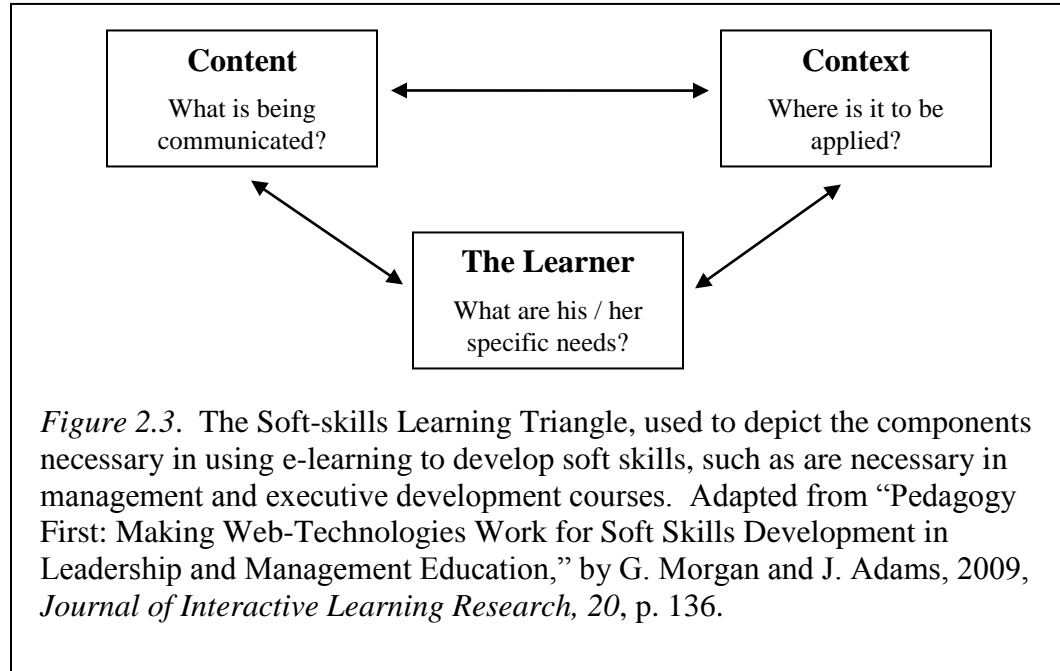
To create successful e-learning situations for management and executive development, Morgan and Adams (2009) have created the Soft-skills Learning Triangle (SLT), as shown in Figure 2.3. To develop successful leadership and management development courses online, one must consider three pieces: content, context, and the learner (Morgan & Adams, 2009). Morgan and Adams (2009) note that for soft-skill development, the component of context must be added to the typical learning equation in order for success.

So, what does it mean to be pedagogically focused versus technology focused? Adams and Morgan (2007) define five key pedagogical drivers:

- “Learning styles - people learn in different ways” (Adams & Morgan, 2007, p. 169).
- “Context based learning” where learners can “judge the relevance of what they are learning” (Adams & Morgan, 2007, p. 169).
- “The importance of informal learning” (Adams & Morgan, 2007, p. 169).

- “The importance of provoking new insights to open up possibilities” (Adams & Morgan, 2007, p. 169).
- “The need for accelerated learning and performance improvement” (Adams & Morgan, 2007, p. 169).

One must remember that “technology is simply a medium for learning” (Adams & Morgan, 2007, p. 169). The pedagogical drivers must be followed for real executive-style learning to happen.



One issue often felt with this new, non-linear, non-instructor-led form of development can be seen from the individual learner, while another is often seen on the part of the instructor (Morgan & Adams, 2009). Learners may not be used to this free form learning model, especially “learners who like to be told exactly what they need to

know or do (Morgan & Adams, 2009, p. 137). Additionally, “expert instructors who feel that they should be in ultimate control of what is learned” may experience some pain with this model (Morgan & Adams, 2009, p. 137).

Morgan and Adams (2009) have developed five key questions to ask when developing e-learning for soft-skill development to be used to surface key issues that will help to create an appropriate alignment between pedagogy and technology and thus aid the design or detailed selection of appropriate e-learning approaches:

1. Are you teaching technical ‘hard skills’ or more interpretive ‘soft skills’?
2. Is your main aim to promote compliance, or to create empowered learners?
3. How important is collaborative discussion and collective learning?
4. Will technology ‘bells and whistles’ get in the way of learning?
5. Is your learning assessment strategy consistent with your answers to the above questions? (p. 139)

If the goal is to teach soft skills and create empowered learners, all three components of the SLT (Figure 2.3) are necessary and second generation e-learning (Figure 2.1) should be used (Morgan & Adams, 2009). Alternatively, if the aim is to use collaborative discussion to allow for an “opportunity for learners on technical programs to ask for points of clarification” first generation e-learning (Figure 2.1) will suffice (Morgan & Adams, 2009, p. 143). But, “if the aim is to try to generate a deeper level of reflective conversation, the requirements of effective soft skill learning and empowerment” become important, and so does second generation e-learning techniques (Morgan & Adams, 2009, p. 143). Regarding question four, it is again important to remember all sides of the SLT represented in Figure 2.3. Technology should enhance the learning experience. Morgan

and Adams remind us to “Aim for learner engagement, not just technical engagement!” (p. 144). By the same point, regarding question five, Morgan and Adams (2009) remind us to make sure we are measuring the learning objectives, not just the “technological sizzle” (p. 144).

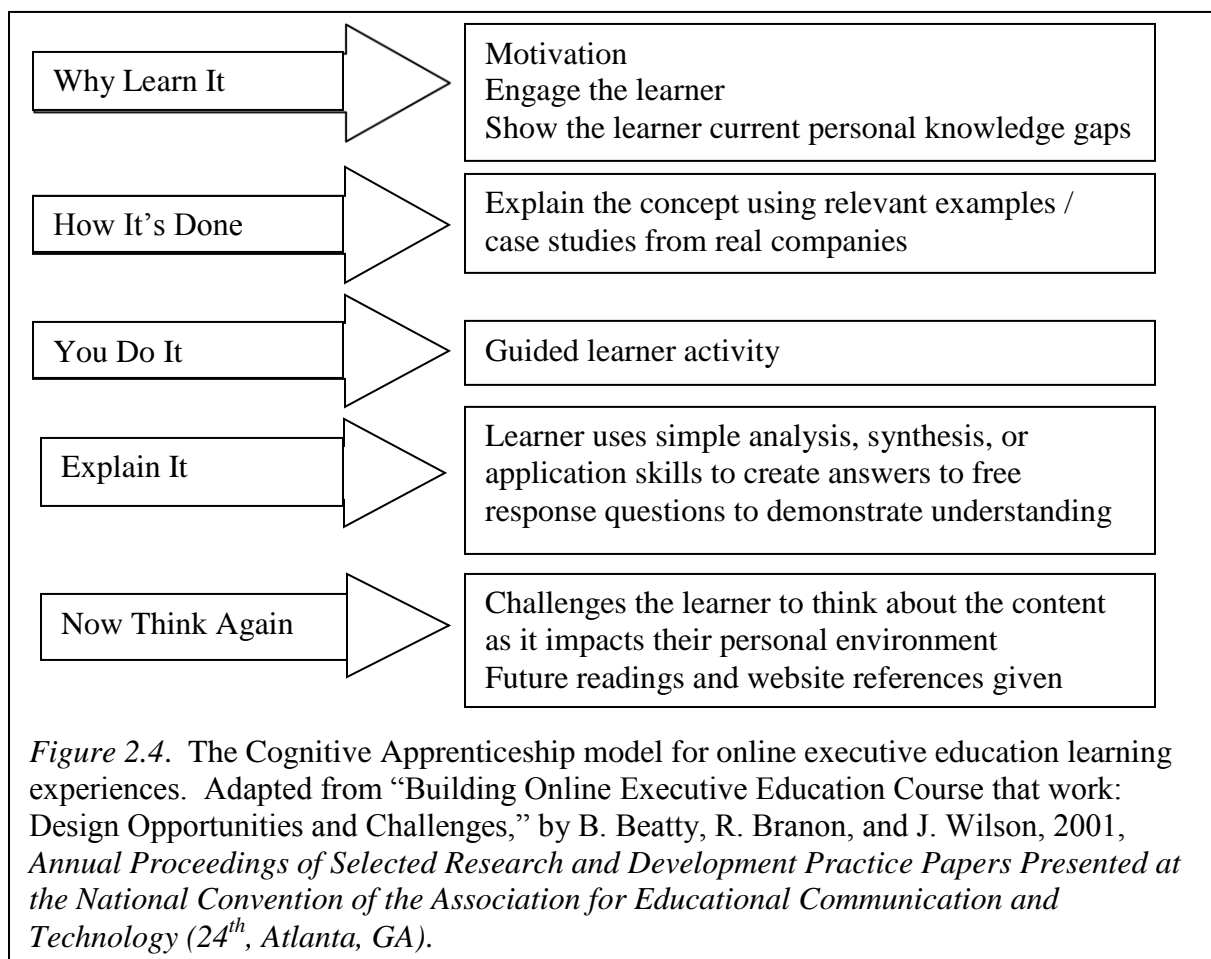
In addition to the problem of technological sizzle, the success of online learning experiences for executives can be difficult to measure because the experience encompasses more than just the instructor experience. Branon et al. (2001) discuss the differences, mentioning that an online executive learning experience must be judged on items such as “technology, the user interface, and the design of the content” as well as the instructor (p. 345). Additionally, Branon et al. (2001) mention the difficulties caused by the fact that the instructor cannot see, and therefore cannot adjust the course content for, the audience.

Beatty, Branon, and Wilson (2001) discuss two models they have developed specifically for executive education, both of which incorporate the element of “experiential learning (learning by doing)” (p. 250). Both models are formed with “solid instructional design blueprints while still allowing for appropriate divergence and variability based on content, student, and client needs” (Beatty et al., 2001, p. 257). The first model, Beatty et al. (2001) call Cognitive Apprenticeship. In this model

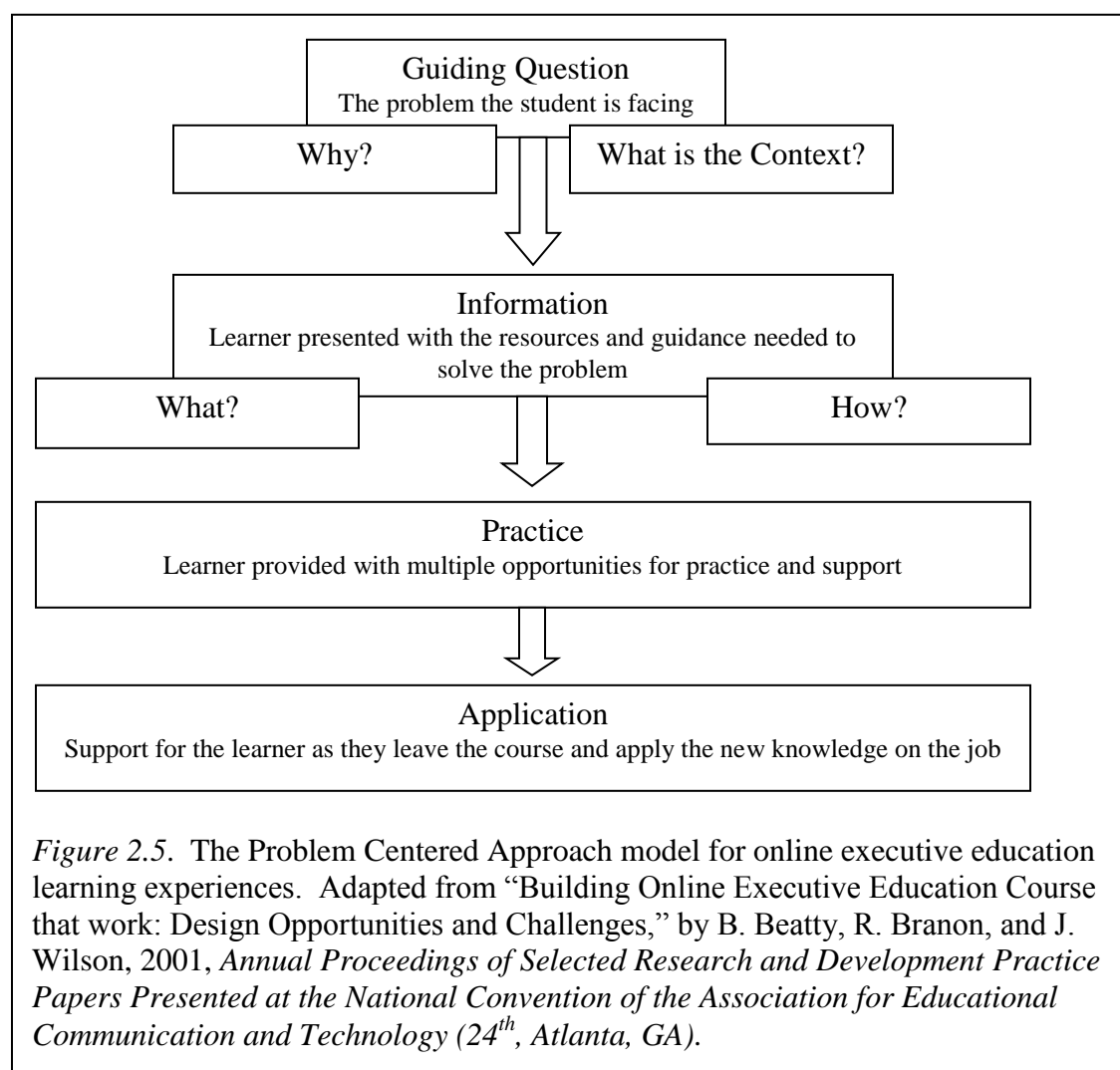
learning is accomplished by participants as they are guided through the study and experience of new information and skills by cognitive experts. The expert begins with a large amount of control over the learning process and content, and gradually turns over more and more control of the learning to the learner. By the end of the experience, the learner is ready to perform the new skills or apply the

new information on their own, in their own environment, as they begin to develop their own expertise through authentic practice (p. 250).

In this model, the online course acts as the expert guide and course modules are bundled into suites of learning experiences so the learner can move through the course content and develop the needed management skills (Beatty et al., 2001). As with the second generation concepts mentioned earlier, the course models are not set up linearly. Instead, the learner is allowed to pick which modules fit best with their current needs from the suite of courses (Beatty et al., 2001). The module is broken into five sections, each specifically designed for a purpose. The module breakdown is described in Figure 2.4.



The second model for online learning presented by Beatty et al. (2001) is Problem Centered Learning. In this model, Beatty et al. (2001) structure the learning experience around an actual problem that the learner is facing. “Since most learning takes place as the result of a gap between what a learner knows and what a learner wants to know, starting with what exactly the learners wants to know...makes sense” (Beatty et al., 2001, p. 254). After a problem is uncovered, the course guides the learner through a four-phase design, seen in Figure 2.5.



Executive Education Today and Tomorrow

In 1998, Dr. Albert A. Vicere published a research paper describing changes in practices and perspectives that executive education would see in the early 2000s. In this, the fourth paper in his series of reports on the subject, 400 companies were invited to participate (Vicere, 1998). From the original 400 companies, 44 returned a 35 question survey detailing their views on executive education and leadership development. From those 44 returned questionnaires 15 years ago, Dr. Vicere concluded eight trends to look for in executive education (Vicere, 1998):

- A growing focus on in-company, customized programs
- An increased level of importance attached to performance feedback in the development process or return on investment (ROI) and accountability
- A perception that technology and distance learning will play a more critical role in the delivery of executive education, helping it to reach a more diverse, growing audience
- A significant shift toward experience-based methodologies (taskforce and project assignments, job rotation, on-the-job learning), coupled with the issue of how to help executives capture learning from these activities
- The disappearance of the desire for long-term, external programs; replaced by a trend toward shorter, large-scale cascading programs involving staff throughout the organization, not just top management
- The necessity for business school executive education providers to link education programs and develop initiatives to their partner organization's strategic imperatives
- A shift in perspective towards leadership competencies for the future including flexibility and adaptability, ability to learn, business acumen

- Because of an increasingly competitive market place, business schools will need to rethink their role and partnerships with organizations

Vicere's work in 1998 supports many conclusions drawn in a research paper from Philip T. Crotty and Amy K. Soule from the year before.

Crotty and Soule (1997) discuss the beginning of executive education, where it stood in 1997, and how they saw it emerging successfully in the future. They also predicted that companies would begin to move into the arena, making university business schools rethink their place there. Additionally, they suggested that providers will need to focus on customers, shorten the long in-house programs designed specifically for top executives, embrace action learning and distance learning techniques, focus on results, measure ROI and accountability, and stress custom, or in-company programs. Additionally, they suggested a move toward consortium-type custom programs where companies partner with a university to offer a custom designed program to their small group, cutting down on the initial cost that comes with single company, customized offerings (Crotty & Soule, 1997).

Conger and Xin (2000) notes that executive education for the 21st century will continue its transformation, moving to programs that are more “innovative, learner centered, and relevant to immediate company needs” (p. 73).

Each of these examples mention distance learning and the components of second generation e-learning as trends for executive education's future success. With this as a focus, one can argue that the time for executive education providers to take the steps necessary in providing a good e-learning experience to their clients is now.

Corporate Distance Education Today and Tomorrow

At the 20th Annual Conference on Distance Teaching and Learning, Bonk and Kim (2005) presented their findings from a research study they conducted of “training professionals (e.g., chief learning officers, training managers, trainers / instructors, e-learning developers) in various types of organizations (p. 1). Using a 49-item survey with a sample including individuals from “government, business, and not-for-profit organizations,” the researchers set out to “explore the current status and future directions of e-learning in the workplace learning setting” (Bonk & Kim, 2005, p. 1). Five key findings were discussed in their report:

- Respondents showed a positive attitude toward e-learning
 - 90% described themselves as being supportive of or optimistic about e-learning (Bonk & Kim, 2005)
 - 80% reported to already be using e-learning to train employees (Bonk & Kim, 2005)
 - A majority of the respondents reported that their organization spent between 1 and 60% of the total training budget on e-learning in 2003 (Bonk & Kim, 2005)
 - 60% reported having an e-learning strategic plan in place (Bonk & Kim, 2005)
- Respondents had a positive opinion about the capability to grow e-learning and blended learning in their organizations

- 25% of the respondents said e-learning was currently their preferred method of training delivery, with 50% predicting that it would be by 2010 (Bonk & Kim, 2005)
- 77% of respondents answered that 1 - 40% of employee training was delivered in a blended format in 2004 (Bonk & Kim, 2005)
- 80% predicted that the dominant delivery method for training in their organization would be delivered in a blended learning format within the next few years (Bonk & Kim, 2005)
- Respondents indicated a shift in the type of instructor needed for delivery of this new training method
 - The need for designers and developers of e-learning would increase most quickly, followed by online mentors, e-learning managers, and e-learning trainers (Bonk & Kim, 2005)
 - The most essential skill needed for successful instruction was online facilitation and moderating ability (Bonk & Kim, 2005)
- Respondents agree that there is a need for quality
 - 70% reported that their online training programs were not as engaging as face-to-face courses (Bonk & Kim, 2005)
 - 20% reported that their most significant challenge in need of being addressed in the e-learning arena was boring, low-quality programs (Bonk & Kim, 2005)
- Respondents predicted that e-learning would change significantly over the following 10 years

- Knowledge management tools would most impact program delivery (Bonk & Kim, 2005)
- The use of interactive simulators would increase significantly (Bonk & Kim, 2005)
- Authentic case and scenario learning, problem-based learning, coaching - mentoring, and guided learning would become the most widely used methods of online learning (Bonk & Kim, 2005)

In the end, Morgan (2001) summarizes three questions that must be kept in mind when deciding what form of e-learning tools will be used in the corporate education realm.

1. “In buying or developing a portal or learning system are you locking yourself into a first-generation marketplace for learning materials?” (Morgan, 2001, p. 209). In order to make sure you are buying or developing a flexible system, “ask the providers to ensure that innovative, flexible learning applications can be used through their system” (Morgan, 2001, p. 210). Additionally, asking for a flexibility demonstration is a good way to make “sure that your portal learning management decision is not going to lock yourself out of” new and innovative learning solutions (Morgan, 2001, p. 210).
2. “In purchasing e-learning systems and applications ask whether the system can self-organize around your performance support needs instead of the reverse” (Morgan, 2001, p. 210). In short, make sure the system is learner-led, not instructor-led instruction that tends to be more “one size fits all” (Morgan, 2001, p. 210).

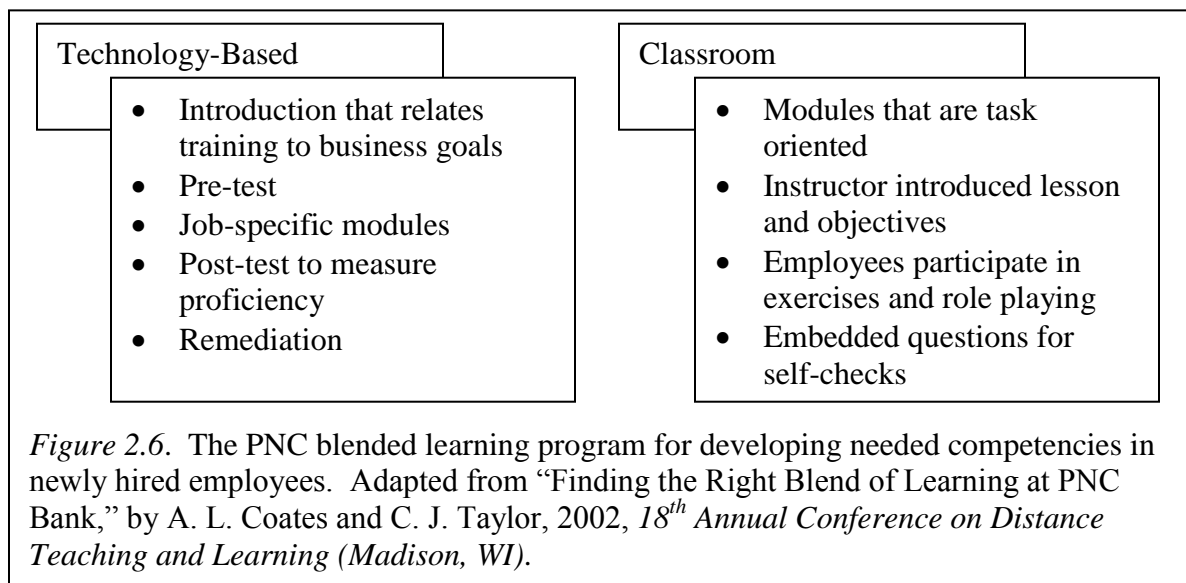
3. Make sure the system you choose is not exclusive. “In the e-learning world, it is possible and desirable to pursue multiple paths at the same time” instead of trying to find the one big solution (Morgan, 2001, p. 210). In this case, “there is much merit in moving forward in a more experimental mode, making sure that you don’t lock yourself out of crucial second and third generation developments” (Morgan, 2001, p. 210).

Case Studies: Using Blended Learning Techniques for Executive Education

At the 18th Annual Conference on Distance Teaching and Learning, Coates and Taylor (2002) present a program used at PNC Bank to develop needed skills in newly hired bank employees. The blended learning method used in this program was developed to “control turnover, reduce expenses, and develop a workforce of 10,000 stretched over six states” (Coates & Taylor, 2002, p. 77). In developing the program, “extensive, competency based, front-end analysis” was completed to ensure a “foundation for success” (Coates & Taylor, 2002, p. 77). After the learning outcomes were determined in this method, a competency model was developed, linking key competencies to wanted employee behaviors. From that, the program was structured, breaking delivery into technology-based and classroom modules. The breakdown is outlined in Figure 2.6.

PNC found this program to be effective; sighting lowered cost of delivery for this training and increased learning retention as key measures for success. By bringing a cross functional team together, including executive sponsors, end users and an excellent instructional design partner, this program was designed to “include the development of the instructional goals, the delivery methodologies, and the instruction sequencing” (Coates & Taylor, 2002). In addition to this, the corporation was willing to “invest in the

technology required to run” (Coates & Taylor, 2002, p. 79) the program. All of these factors have played into the success of this blended learning experience for PNC Bank employees.



Another example of blended learning methodology being used for workforce development can be found at the U.S. Army Armor School in Fort Knox, Kentucky. Bonk, Olson, Wisher, and Orvis (2002) use the School’s Armor Captains Career Course (AC3-DL) as another example of success, presenting their findings again at the 18th Annual Conference on Distance Teaching and Learning. “The purpose of the AC3-DL is to train captains to command companies and perform as assistant operations officers at command units such as a battalion” (Bonk et al., 2002). Bonk et al. (2002) describe the program as a three-phase experience, with the first two parts completed using distance education and the third experience completed face-to-face. Additionally, while part one is asynchronous, allowing the learner to complete the program according to his or her

own availability, part two is synchronous (meaning all learners have to complete part two at the same time).

Bonk et al. (2002) completed focus groups with learners from the AC3-DL program, program instructors, and the Distance Learning Education Advisor for the program to gather information on the perceived advantages and disadvantages of the course. Advantages and disadvantages of each group are presented in Table 2.1.

Table 2.1

Perceived Advantages and Disadvantages of a Blended Learning Model from Three User Groups

Group	Advantage	Disadvantage
Learner	Flexibility Immediate feedback Ability for thoughtful comment Ability for reflection	Module length Technology downtime Technology incompatibility System inflexibility
Instructor	Ability to tailor for students Providing immediate feedback Providing online mentoring Standardization of content Embedded small group interaction Content updated easily Knowledge application fostered	High attrition Excessive time commitment Lack of control (module size)
Advisor	Ability to track learning Authentic learning experience Advanced learning theory Address individual needs	Commitment to a technology

Note. Adapted from “Blended Web Learning: Advantages, Disadvantages, Issues, and Considerations,” by C. J. Bonk, T. Olson, R. A. Wisher, and K. Orvis, 2002, *18th Annual Conference on Distance Teaching and Learning* (Madison, WI).

In addition to the perceived advantages and disadvantages of using a blended learning method, Bonk et al. (2002) discuss “ten key web-based instruction

considerations or issues mentioned across participants” (p. 56) in their report. These findings include advice in the areas of providing feedback; developing meaningful, real-world content; what is the appropriate size and scope for modules; course development and organization; the instructor’s role; how to structure small groups; how to create flexible and active learning; how to best use technology; how to accomplish general skill building; and assessment techniques. According to the findings of Bonk et al. (2002), advice from learners includes:

- Use email to contact instructors for feedback
- Offer online products that approximate real-world application
- Divide asynchronous content into smaller modules to maintain motivation and increase completion
- Set the stage for learning through pre-orientation sessions
- Employ instructors as helpful learning facilitators
- Rotate roles among group members during online role playing
- Make the learning as flexible as possible, allowing learners to complete at their own pace
- Use basic technology when possible to eliminate downtime and frustration
- Build the learning community through small talk, introductions and information sharing
- Match online assessments with real-world expectations

Bonk et al. (2002), also present the following advice from instructors:

- Provide instant and consistent feedback using email

- Require the learners to produce measurable outcomes or products from the experience that can be evaluated by instructors and peers
- Have the option to change module size, if needed, to increase completion rates
- Ask students to learn basic content asynchronously, put the knowledge to use synchronously, and apply the knowledge in face-to-face sessions
- Act as facilitator to the learning process
- Match groups appropriately (strong with weak to improve performance)
- Be flexible, to allow the learner to fit the learning into his or her schedule
- Use asynchronous techniques for basic learning, synchronous for application of the learning
- Use online tasks that teach the learner how to work with others to solve a problem in a virtual environment
- Understand that asynchronous learning is best suited for objective tests; synchronous learning is best suited for performance evaluation

Lastly, Bonk et al. (2002), provide the following advice from the program's distance education advisor:

- Involve direct email feedback
- Allow the learner to apply new learning to real-life exercises
- Use minimal extraneous content, graphics or practice exercises
- Carefully analyze the target audience's wants and needs before the program is developed
- Use instructors to provide feedback and a sense that someone cares about the learners' experiences

- Use technology to create active environments with role play and simulations
- Offer flexibility
- Stick to what technology can presently accomplish
- Structure a program to move from asynchronous to synchronous to face-to-face learning to best foster learning
- Offer online assessments as pre-tests, post-tests, and practice exercises that provide immediate feedback; random feedback and evaluation gates can also be beneficial

ETHICON Endo-Surgery (EES), a Johnson & Johnson company, is another example of a corporation which uses distance education to provide “a forum for associates to learn about business and themselves in order to enhance their ability to contribute to the bottom line” (Saltzman, 1997, p. 58). The company states three main reasons for using distance learning methods to enhance their corporate goal of becoming a learning organization:

- “because EES spans two nations” (Saltzman, 1997, p. 58)
- “because EES employees have challenging work responsibilities and schedules” (Saltzman, 1997, p. 58)
- “because many educational opportunities originate from sites around the world” (Saltzman, 1997, p. 58)

The EES learning model is detailed in Figure 2.7.

STEP 1:	Set goals based on analysis of trainee needs and Board of Directors' business objectives Goals set yearly Goals reviewed yearly to confirm business objectives
STEP 2:	Generate solutions to achieve the goals Solutions piloted
STEP 3:	Solutions are selected
STEP 4:	Goals are prioritized
STEP 5:	Time frame is set
STEP 6:	Solution manager selected Process mapped to enable proper management Process map is used as a performance support tool
STEP 7:	Feedback gathered Review successes and lessons learned Collect and review feedback from the trainees

Figure 2.7. The EES distance learning design process. Adapted from "The Learning Council: Corporate Distance Learning in Action," by P. Saltzman, 1997, American Journal of Distance Education 11, p. 58.

Through the distance learning process described in Figure 2.7, EES has successfully launched numerous distance learning programs to improve the business literacy of their employees (Saltzman, 1997). All programming launched using their Executive Education Network is "developed by America's leading business schools and institutions and delivered via satellite to executives who attend these programs in the convenient environment of their own company" (Saltzman, 1997, p. 61). Examples include "Harvard's Managing in the Marketplace; Southern Methodist University's Mid-Management Program...the Center for Creative Leadership's Woman as Leaders, University of Southern California's Implementing Change: The Human Dimension" (Saltzman, 1997, p. 61). They have found the main benefits of using this system to include:

- "Increase in the intellectual capital of the organization;

- Conservation of time spent on traveling to other sites;
- Reduction of travel and off-site training costs; and
- Potential application of business ideas, otherwise not available to the company, which directly affect the top and bottom lines” (Saltzman, 1997, p. 62).

In addition, the use of distance learning has allowed EES to “remain flexible and responsive to the constantly changing learning needs of our employees” (Saltzman, 1997, p. 62). EES is “satisfied with the success of these programs thus far, and they seem to become more and more useful as time passes. The use of a variety of distance learning methods is certainly a winning strategy” (Saltzman, 1997, p. 62) according to the company.

In addition to the Executive Education Network used by EES, other business schools are getting into the corporate distance education game. “The Tuck School of Business at Dartmouth, US recently conducted a virtual learning series with three groups of Citibank India managers at Chennai, New Delhi and Mumbai” (CORPORATE, 2007, para. 1). Prof. Anant K. Sundaram, Faculty Director of Executive Education is quoted as saying “the true potential and efficiencies that virtual learning can achieve across vast distances and time zones have not been fully harnessed yet, despite the fact that it is a medium of learning that has been around for almost a decade” (CORPORATE, 2007, para. 7). Prof. Sundaram continues that “this is especially true of the leading business schools, including Tuck and its competitors. He added: We think that it is a wide open territory with a terrific future, and one that we are truly excited to be able to take on.” (CORPORATE, 2007, para. 8).

Strother (2002) discusses in her research on the effectiveness of e-learning in corporate education the fact that “Unilever claims that e-learning helped their sales staff produce more than \$20 million in additional sales” (p. 7). To track the effectiveness of their e-training program, they ask “course participants to take part in a teleconference several months after the course (where they are asked) how they have integrated their new skills into their work and to share best practices” (Strother, 2002, p. 7). Strother (2002) also notes the success of the Etera e-learning sales force training. Their claim is of a 170% increase in sales for an employee who has completed their on-line training program (Strother, 2002). Additionally, DeRouin, Fritzsche, and Salas (2005) state that e-learning is being used at Nestle to develop employees in the areas of “communication, teamwork, and leadership” and Bank of America to deliver “interpersonal skills training” (p. 922).

Current Research: Using Online Learning Methods for Corporate Training

In a mixed-methods study, Gunawardena, Linder-VanBerschot, LaPointe, and Rao (2010) look to “determine the predictors of success of online learning, defined as learner satisfaction and transfer of learning” (p. 207). In their review of the literature, they found that “research on online education and training in the corporate sector are predominantly case studies that describe specific contexts and programs” (Gunawardena et al., 2010, p. 208). Because of this, their study was completed to move beyond this view, to complete a “inferential and naturalistic” study to “examine learner characteristics and variables in the online education process that lead to learning gains, transfer of learning, and satisfaction” (Gunawardena et al., 2010, p. 208). To do so, Gunawardena et al. (2010) used both learner satisfaction and transfer of learning as dependent variables.

The independent variables chosen include “four variables that have a likelihood of impacting learner satisfaction in this corporate setting: online self-efficacy, course design, learner-learner interaction, and learner-instructor interaction” (Gunawardena et al., 2010, p. 209). The Baldwin and Ford transfer model was used to define the second dependent variable of learning transfer (Gunawardena et al., 2010). This model includes the components of “trainee characteristics (ability, personality, motivation, and organizational commitment), training design (the extent to which the course design supports transfer), and work environment characteristics or transfer climate (peer support, supervisor support, and opportunity to use)” (Gunawardena et al., 2010, p. 210). From this, the independent variables of “collegial support, organizational support, manager support, and organizational incentives” were chosen (Gunawardena et al., 2010, p. 212). Two survey instruments were sent to a mixture of e-learning participants at the company to answer the study’s research questions.

In the end, Gunawardena et al. (2010) determined that “learners, instructors, and instructional designers perceived online education as a viable means of updating knowledge and skills in an international corporate online program” (p. 222). Gunawardena et al. (2010) found that the “highest predictor of learner satisfaction in the course was online self-efficacy, suggesting the importance of orientation programs for corporate employees who are new to online learning even though they may be technically savvy” (p. 222). Gunawardena et al. (2010) also found that the highest predictor of learning transfer from online corporate education was “collegial support, which demonstrates the necessity for an organizational culture that encourages peer support for transfer of new learning” (p. 223).

Another study, aimed to determine the usefulness of e-learning in small and medium-sized companies, was completed in Europe in the late 2000s. Called the European ELQ-SME project, the study comprised of seven partner groups and conducted research in eight European countries (Paulsen, 2009). For this study, “the partners developed a common template for the case descriptions” and “each partner was responsible for finding and choosing at least two relevant cases within their geographical area” (Paulsen, 2009, Analysis of the Case Descriptions, para. 1). Enterprises were then split into four groups (small, medium-sized, large, and e-learning providers).

Learnings from the study regarding small enterprises include:

- Small companies, those with fewer than 20 employees, tend to use e-learning “as a flexible way of providing training and further education for their employees” (Paulsen, 2009, Small Enterprises, para. 1).
- Learners generally enroll in “generic commercial online courses that are relevant to their job performance” (Paulsen, 2009, Small Enterprises, para. 1).
- Learners in this group were generally satisfied with the learning experience and had high completion rates (Paulsen, 2009)

Some of the interesting challenges in using e-learning described by this group include:

- “The challenge of overcoming resistance to e-learning among employees” (Paulsen, 2009, Challenges and Barriers, para. 1)
- “Digital literacy” (Paulsen, 2009, Challenges and Barriers, para. 2)
- The fact that most content is not in the employees’ native language (Paulsen, 2009, Challenges and Barriers, para. 2)

- “Insufficient knowledge of and adaption to real needs and expectations of trainees” (Paulsen, 2009, Challenges and Barriers, para. 2)
- “Lack of human interaction” (Paulsen, 2009, Challenges and Barriers, para. 2)
- “Deficient policy regarding e-learning” (Paulsen, 2009, Challenges and Barriers, para. 4)
- “Unsuitable workplaces for undisturbed learning” (Paulsen, 2009, Challenges and Barriers, para. 4)

For e-learning to be successful for small enterprises, Paulsen (2009) contends that it must be flexible and motivating, “as well as relevant and useful to the daily work and tasks in the company” (E-learning Features, para. 1).

Learnings from Paulsen (2009) regarding medium-sized enterprises include:

- Generally, even though they may have the financial means to develop in-house e-learning, medium-sized enterprises still tend to use outside vendors
- Learners in this group were generally satisfied with the learning experience and had moderate to high completion rates (Paulsen, 2009)
- For this group, certification was important; receiving something for completing the experience was mentioned

Challenges for the medium-sized enterprise group echo some of the interesting challenges mentioned before, according to Paulsen (2009):

- “Availability of Internet with the correct browser” (Challenges and Barriers, para. 1)
- “Language barriers” (Challenges and Barriers, para. 1)
- “Management commitment” (Challenges and Barriers, para. 1)

- Employee acceptance of this as a viable way to learn in the age group 35-45

In next examining large enterprises, Paulsen (2009) notes the following findings:

- In the enterprises studied here, most develop their own e-learning programs and purchase LMS (learning management system) services
- When companies measured employee satisfaction with the e-learning experience, they were generally pleased

Challenges for the large enterprises, according to Paulsen (2009) include:

- Lack of orientation information
- Lack of company buy-in to the e-learning methodology of training
- Technology availability issues

Paulsen (2009) then looked at actual e-learning providers as the last subject group in this study. It should not be surprising that barriers to using e-learning were lower in this group than in the general corporate audience. Benefits seen in this group included:

- “Opportunities to study during work hours” (Paulsen, 2009, E-learning Features and Success Factors, para. 1)
- Relevant coursework (Paulsen, 2009)
- “Courses that will result in promotions or better payment” (Paulsen, 2009, E-learning Features and Success Factors, para. 1)

In the end, Paulsen (2009) found that generic courses offered on the open market, sector courses developed by associates, and corporate programs developed internally can all be successful vehicles for e-learning in corporations today. Paulsen (2009) also found “seven e-learning features perceived as advantages by small and medium-sized enterprises, including:

- Flexibility in time and place
- Cost reduction
- Logistical advantage
- Reduced time to market
- Increased sales
- Improved ties between enterprises
- Positive organizational effects” (E-learning Features, para. 1)

Paulsen (2009) also relays the following factors needed for a successful e-learning experience for small and medium-sized enterprises:

- Completion rates
- Management support
- Motivation, which can be increased by having relevant learning experiences
- Certification
- Essential / compulsory courses being offered in this manner
- Content and course design “built on practical, in-depth and up-to-date knowledge of the subject” (Success Factors, para. 6)
- Use of blended learning to incorporate the positive effects of face-to-face learning with the flexibility and benefit of e-learning

Berge and Kearsley (2003) discuss the results from a survey completed within 17 organizations who were originally asked to write case studies about their use of e-learning in 1998 and 2001. Interesting, they found similar results in that most of the organizations that they questioned in 2003 had increased their use of e-learning solutions and had increased the amount of e-learning vendors they were using to satisfy the needs

of their employees. They also found an increase in the use of blended learning in the corporate training market. Berge and Kearsley (2003) also found similar challenges including time and cost of e-learning development, formalizing the e-learning process within the company, and creating and maintaining a real interest in and understand of e-learning (both the benefits and what areas are best suited for it) within the entire organization.

Marçal and Caetano (2010) note in their study that “there is a vast body of literature regarding blended learning in academic settings. However there is a lack of information related to blended learning and other forms of distance learning...in the corporate training context” (Blended Learning, para. 5). They aim to fill that gap with their 2010 research study aimed at 38 organizations in Portugal. Using an online survey, Marçal and Caetano (2010) collected data on “five dimensions of blended learning: 1) e-learning and b-learning, 2) cooperation and assistance, 3) platforms and support, 4) training assessment, 5) training outcomes” (Measures, para. 2). The results of Marçal and Caetano (2010) show that blended learning is more prevalent in organizations with more learning experiences offered, and more organizations offering this form of learning when compared to e-learning alone. Marçal and Caetano (2010) also found that most of the organizations that they studied use training evaluations to measure the benefit of their blended learning initiatives, including items such as diagnostic assessments, formative evaluations, summative evaluations, and participation reports. Marçal and Caetano (2010) note that about 75% of the organizations that they studied test their employees after a blended learning experience to measure learning. With regard to training outcomes, Marçal and Caetano (2010) found that “all of the organizations used

questionnaires to evaluate trainees' satisfaction with the blended learning course” (Training Outcomes, para. 1). Difficulties found in blended learning experience for the organizations fell into six main areas:

- “Ineffective time management,
- Lack of self-discipline,
- Inappropriate characteristics from hardware and software, which minimize or disable the use of blended learning training solutions,
- Difficulty working as part of a team,
- Difficulty in using the e-learning platform, and
- Poor tutorial quality” (Marçal & Caetano, 2010, Training Outcomes, para. 2).

Marçal and Caetano (2010) also found that most learners, about 68%, were very open to and enthusiastic about using blended learning as a training option. Another interesting finding of the Marçal and Caetano (2010) study was the organizations' perceptions of the effectiveness of blended learning versus traditional and e-learning options seen in Table 2.2. In the end, Marçal and Caetano (2010) note a preference for blended learning as the model to be used in organizational training and development.

Table 2.2

Learning Outcomes when using a Blended Learning Model versus Traditional Learning and E-Learning for Employee Training in 34 Portuguese Organizations

Outcomes	b-Learning vs. Face-to-Face alone	b-Learning vs. e-Learning alone
Better	50%	78.1%
Worse	8.8%	6.3%
No Significant Difference	41.2%	15.6%

Note. b-Learning refers to using a blended learning model. Adapted from “Corporate Blended Learning in Portugal: Current Status and Future Directions,” by J. Marçal, and A. Caetano, 2010, *ISCTE-IUL – Lisbon University Institute*.

In their review of the literature, DeRouin et al. (2005) note a study completed by Thomson, Inc. where similar results were found. The results from the Thomson, Inc. (2002) study are represented in Table 2.3.

Table 2.3

Learning Outcomes when using a Blended Learning Model versus E-Learning and No Training to Develop New Real-World Skills in Employees

Comparison	Performance Improvement
Blended Learning vs. e-Learning Alone	30%
Blended Learning vs. Control	159%
e-Learning Alone vs. Control	99%

Note. Control refers to the subject group who received no training. Adapted from “Thomson Job Impact Study: The Next Generation of Corporate Learning,” Thomson, Inc., 2002, *NETg, Inc.*

Interestingly, Sitzmann and Wisher (2006) also found an increase in effectiveness in learning when they compared web-based learning to face-to-face only instruction in their 2006 meta-analysis, finding that web-based instruction was 6% more effective when the same instructional methods were used for teaching declarative knowledge (knowledge of facts and principles), and 11% more effective when different methods (pedagogies) were used. Sitzmann and Wisher (2006) also found no difference when web-based instruction was used to teach procedural knowledge (the ability to perform newly learned skills), making web-based instruction just as successful as face-to-face instruction in their study.

Chapter Summary

This chapter has been provided as a review of the related literature and past research studies in the area of online learning and executive education. Beginning with a discussion on how executive education started in the 1920s at Harvard, the discussion

then progressed to show how executive education has changed, and will need to continue to change to remain effective. By focusing more on strategic leadership, organizational change, and action learning, executive education will remain viable in the future.

Additionally, a focus on cascading programs and a feedback pedagogy will be necessary.

The chapter discussed the advancements of using technology in education, describing web 1.0 technology and web 2.0 technology. The case is presented that web 2.0 technologies should play a greater role in executive education programs as new and different ways of educating the workforce are considered. With highly interactive programs and collaborative online learning, web 2.0 can be used in executive education in order to create the interconnected learning experiences workers want and need.

Additionally, web 2.0 technologies can be used to bring context to learning, a necessary step in the development of soft-skills, a key factor in executive education.

Finally, numerous examples of using online and blended learning methods in executive education were discussed. From corporate examples (both in the United States and abroad), to examples in the United States Department of Defense, examples of how this form of learning is being developed and used and successes that have been seen in the area of using online and blended methods were discussed.

All of this information is presented in order to make the case that online and blended methods of learning must be incorporated into university-run executive education programs in order for these programs to remain as a successful means of educating the workforce and to start building the model for how this change can be successfully managed.

Chapter 3 Methodology

The Problem

The purpose of this study was to investigate the process used by three university executive education departments in the United States to develop online executive education portfolios. Specifically, the research questions include:

1. How is technology being used in online executive education programs?
2. How was the online, non-credit program portfolio developed?
 - 2.1 Who were the identified stakeholders, and what roles did they play?
 - 2.2 What tools were used to build the online community of learning?
 - 2.3 What was the program design process from the beginning to the time the program was delivered?

As such, findings from this study help us better understand the steps necessary in the development of an online, non-credit program portfolio within university executive education departments. This study was specifically designed to identify what is necessary for launching a successful non-credit program portfolio, designed for adult learners who are not seeking college credit. Instead, these individuals are looking to develop the skills needed to be successful corporate leaders (Beatty, Branon, & Wilson, 2001).

Study Design

The researcher has chosen a case study design for this research. According to Creswell (2007), “case study research involves the study of an issue explored through one or more cases within a bounded system (i.e., a setting, a context)” (p. 73).

Case study research is a qualitative approach in which the investigator explores a bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources of information (e.g., observations, interviews, audiovisual material, and documents and reports), and reports a case description and case-based themes (Creswell, 2007, p. 73).

This study has been designed with this definition in mind to provide insight using a description of three universities in the United States to develop themes (essential elements) for successful launching of non-credit, online executive education programs. As such, this case study represents a collective case study, where “one issue or concern is...selected, but the inquirer selects multiple case studies to illustrate the issue” (Creswell, 2007, p. 74). As Yin (2003) suggests, this collective case study uses replication, where the case study procedure is replicated in each instance in order to develop the best results.

According to Creswell (2007) and Yin (2003) six types of data are appropriate for use in a case study analysis. These include “documents, archival records, interviews, direct observation, participant-observation, and physical artifacts” (Creswell, 2007, p. 75). Once collected, holistic analysis or embedded analysis of the data are performed. “When multiple cases are chosen, a typical format is to first provide a detailed description of each case and themes within the case, called a within-case analysis, followed by a thematic analysis across the cases, called a cross-case analysis” (Creswell, 2007, p. 75). From this information, the study design was developed, which is shown in Figure 3.1.

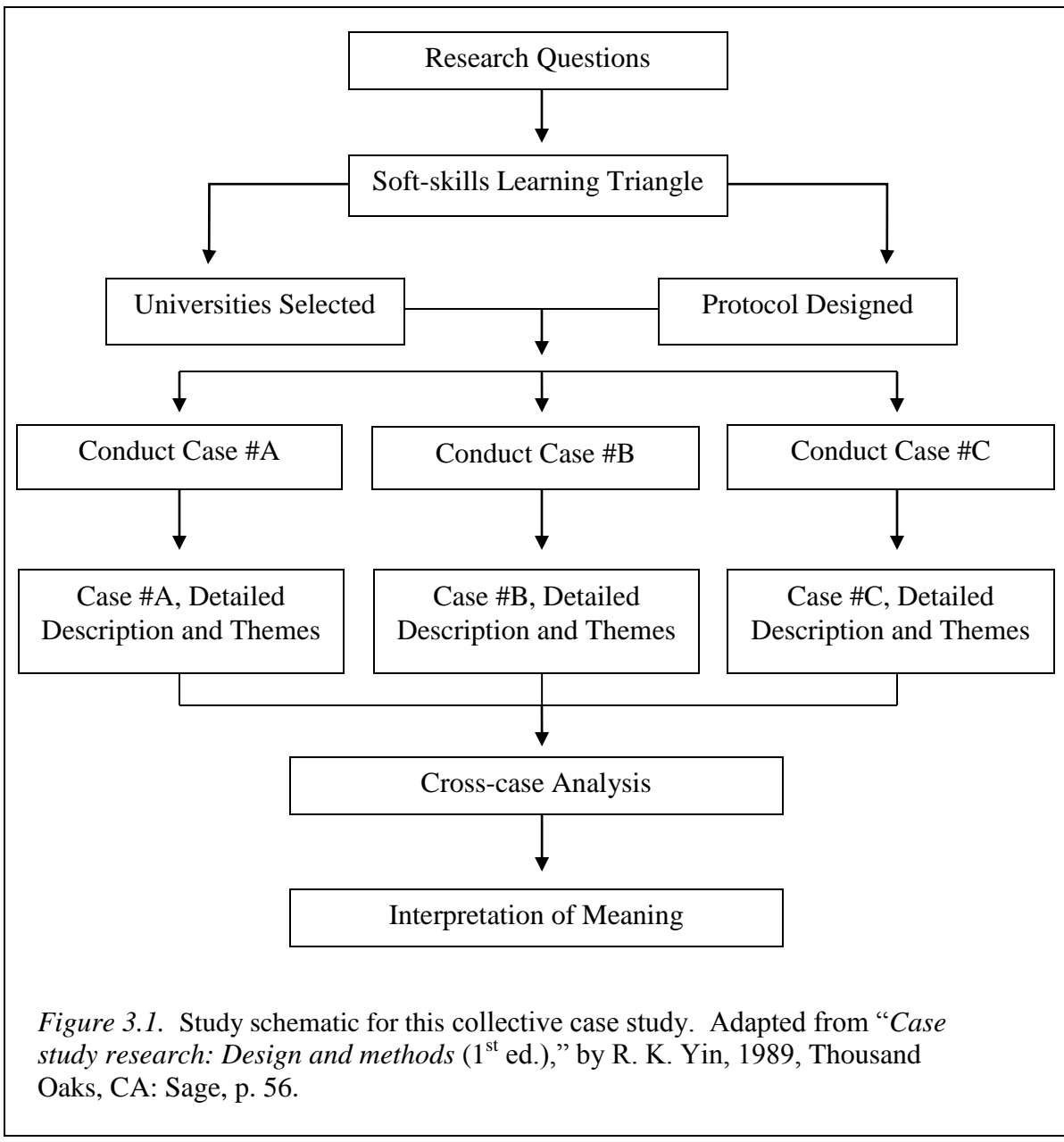
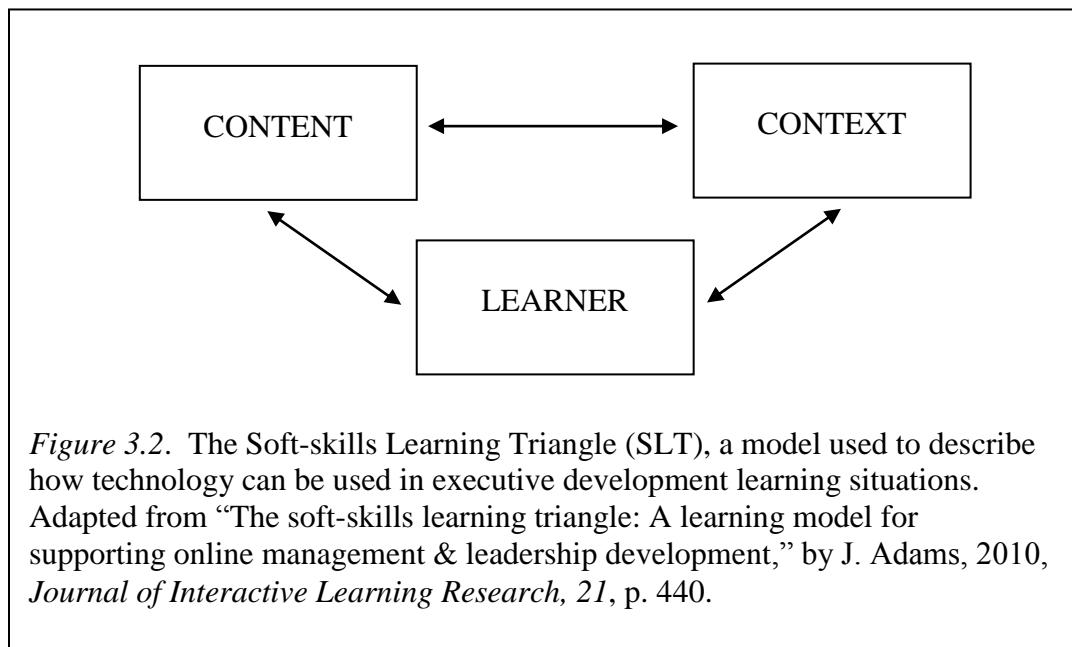


Figure 3.1. Study schematic for this collective case study. Adapted from “Case study research: Design and methods (1st ed.),” by R. K. Yin, 1989, Thousand Oaks, CA: Sage, p. 56.

Conceptual Framework

The conceptual framework of this study was used to guide the researcher. In this study, the Soft-skills Learning Triangle (SLT), as shown in Figure 3.2 has been selected. The SLT was selected because it is “a model created to help coaches, mentors, and

educators understand how web-technologies can be used to support management learning and soft-skills development” (Adams, 2010, p. 437).



Sampling Strategy

Creswell (2007) discusses the importance of purposeful sampling in qualitative studies. “This means that the inquirer selects individuals and sites for study because they can purposefully inform an understanding of the research problem and central phenomenon in the study” (Creswell, 2007, p. 125). The three university sites that were selected for this study include three geographically dispersed universities: a private research university on the west coast (University A), an independent national Catholic university on the east coast (University B), and an international business school in the mid-west (University C). All have been selected because they currently advertise an online, non-credit executive education program portfolio and are leaders in the university

community. Additionally, all three universities chosen appear within the top 50 universities on the Businessweek 2012 United States business school rankings. In examining these three sampling locations, it was believed that the researcher would find unique characteristics as well as consistent themes, bringing a deeper understanding of answers for the research questions.

Case Study Protocol

A case study protocol, as defined by Yin (2003), is necessary in case study analysis in order to collect data. “The protocol contains the instrument as well as the procedures and general rules to be followed in using the protocol” (Yin, 2003, p. 67). Additionally, “the protocol is a major way of increasing the reliability of case study research and is intended to guide the investigator in carrying out the data collection from a single-case study ... even if the single case is one of several in a multiple-case study” (Yin, 2003, p. 67). The case study protocol for this study is found in Appendix A.

Data Collection

As mentioned earlier, case study analysis generally requires data collected in multiple forms. Six types of data are appropriate for use in a case study analysis. These include “documents, archival records, interviews, direct observation, participant-observation, and physical artifacts” (Creswell, 2007, p. 75). In this study, interviews were conducted within each university executive education department with relevant individuals. Documents, direct observation, and physical artifacts were also used, including web site documentation for each university as well as sample programs and screen shots of actual online executive education programs, when available.

Instrument Design

The research questions for this collective case study provide the basis for structuring the interview guide for the participant interviews. Using the case study protocol, the interview guide was developed in the manner of a focused interview, “in which a respondent is interviewed for a short period of time - an hour, for example” (Yin, 2003, p. 90). Using the focused interview method, “the interviews may still remain open-ended and assume a conversational manner, but you are more likely to be following a certain set of questions derived from the case study protocol” (Yin, 2003, p. 90). The interview guide for this study can be found in Appendix B. The link between these interview questions and the research questions is summarized in Table 3.1.

Table 3.1

The Link between Research Questions and Interview Questions

Research Questions	Interview Questions
1. How is technology being used in online executive education programs?	Q7, Q8
2. How was the online, non-credit program portfolio developed?	Q2, Q3, Q4, Q5, Q6, Q7, Q8
2.1 Who were the identified stakeholders, and what roles did they play?	Q5, Q6
2.2 What tools were used to build the online community of learning?	Q9, Q10
2.3 What was the program design process from the beginning to the time the program was delivered?	Q2, Q3, Q4

Data Analysis

According to Creswell (2007), in a case study analysis, data analysis should be performed in order to make “a detailed description of the case and its setting” (p. 163).

In order to achieve this objective, the following steps were performed.

Preparing for data analysis.

Recorded interviews were transcribed into field notes. The notes were cleaned, removing all personal information linking the statements to individual interviews in order for coding to begin. Concepts were developed “through the process of coding which represents the operations by which data are broken down, conceptualized, and put back together in new ways” (Strauss & Corbin, 1990, p. 57).

Coding.

The coding process was adapted from Glaser and Strauss (1967) using a model discussed in a study by Kezar (2005). Using the “constant comparative method as outlined by Glaser and Strauss (1967)” the transcripts, along with any documents and field notes and observation notes were read and detailed themes were observed and recorded (Kezar, 2005, p. 645). A list of themes was developed using the open coding process and properties of each of the codes were examined (Kezar, 2005). Open coding is defined as “the analytic process through which concepts are identified and their properties and dimensions are discovered in data” (Strauss & Corbin, 1998, p. 101). The transcripts were reviewed numerous times to ensure complete analysis. The data were then coded and collapsed using axial coding in order to arrive at a final list of themes (Kezar, 2005). Axial coding is defined as “the process of relating categories to their subcategories, termed axial because coding occurs around the axis of a category, linking categories and the level of properties and dimensions” (Strauss & Corbin, 1998, p. 123). This was done in order “to form more precise and complete explanations about phenomena” (Strauss & Corbin, 1998, p. 124). “Data tables were developed, and quotations and field notes that related to themes were moved into the relevant theme

tables, with a designation indicating where the quote was from in the original interviews” (Kezar, 2005, p. 645). Quotations that were used in the case study report were highlighted in bold font in each theme table.

Within-case analysis.

“The importance of within-case analysis is driven by one of the realities of case study research: a staggering volume of data” (Eisenhardt, 1989, p. 540). This step in the analysis, according to Eisenhardt (1998), involves “detailed case study write-ups for each site” (p. 540). “The overall idea is to become intimately familiar with each case as a stand-alone entity” (Eisenhardt, 1998, p. 540). After this step, a deep knowledge of each case was present in the researcher’s mind, allowing for the researcher to look for patterns across the cases.

Cross-case analysis.

There are two major approaches generally accepted as suitable ways to perform a cross-case analysis: variable research and case-oriented research (Khan & VanWynsberghe, 2008). “In variable-oriented research, variables take center stage” (Khan & VanWynsberghe, 2008, Section 3, para. 1). Using this approach, the researcher tends “to pay greater attention to the variables across cases rather than the case itself. Variables are compared across cases in order to delineate pathways that may have led to particular outcomes” (Khan & VanWynsberghe, 2008, Section 3.2, para. 8). “In case-oriented research, commonalities across multiple instances of a phenomenon may contribute to conditional generalizations” (Khan & VanWynsberghe, 2008, Section 3, para. 1). As case-oriented analysis is meant to compare cases on the whole looking for

similarities, “special emphasis is given to the case itself instead of on variables across the case.” (Khan & VanWynsberghe, 2008, Section 3, para. 1).

Since the unit of analysis of this research was a process, and variables of the process developed at each university have been explored, variable-oriented research methods were used to complete the cross-case analysis. For each research question, the variables discovered at each university were summarized and charted for direct comparison.

Verifying the quality of the study.

According to Stake (1995), there are 20 criteria that should be met in a good case study analysis. The following have been considered:

1. Is the report easy to read?
2. Does it fit together, each sentence contributing to the whole?
3. Does the report have a conceptual structure (i.e., themes or issues)?
4. Are its issues developed in a serious and scholarly way?
5. Is the case adequately defined?
6. Is there a sense of story to the presentation?
7. Is the reader provided some vicarious experience?
8. Have quotations been used effectively?
9. Are headings, figures, artifacts, appendixes, and indexes used effectively?
10. Was it edited well, then again with a last-minute polish?
11. Has the writer made sound assertions, neither over- nor under-interpreting?
12. Has adequate attention been paid to various contexts?
13. Were sufficient raw data presented?

14. Were data sources well-chosen and in sufficient number?
15. Do observations and interpretations appear to have been triangulated?
16. Is the role and point of view of the researcher nicely apparent?
17. Is the nature of the intended audience apparent?
18. Is empathy shown for all sides?
19. Are personal interactions examined?
20. Does it appear that individuals were put at risk? (Stake, 1995, p. 131).

Triangulation.

Yin (2003) discusses three principals of data collection for case study analysis. For data triangulation, this research study collected “information from multiple sources but aimed at corroborating the same fact or phenomenon” (Yin, 2003, p. 99). Additionally, by using multiple sources of evidence, a converging line of inquiry was established (Yin, 2003). “Thus, any finding or conclusion in a case study is likely to be much more convincing and accurate if it is based on several different sources of information” (Yin, 2003, p. 98). Additionally, Patton (1997) suggests another form of triangulation, collecting data from different sources (source triangulation). In the cases where two or more individuals were involved in the non-credit executive education portfolio development, interviews were completed at the first and second positions within the university department. As this is a cross-case analysis of the development process undertaken at three different universities in the United States, the case study design also allowed for triangulation between the three different universities by identifying repeated themes found within each single case analysis (Miles & Huberman, 1994).

Reliability / Dependability.

Another important test in developing a quality case study is reliability. As defined by Yin (2003):

The objective is to be sure that if a later investigator followed the same procedures as described by an earlier investigator and conducted the same case study all over again, the later investigator should arrive at the same findings and conclusions (p. 37).

“The goal of reliability is to minimize the errors and biases in a study” (Yin, 2003, p. 37.)

As such, it is suggested that a case study protocol and a case study database be developed when completing case study research (Yin, 2003). Both steps have been taken in this research to help enhance reliability. The case study protocol for this research can be found in Appendix A. The case study database for this research can be found at <https://protected.personal.psu.edu/a/1/alm251/ePortfolio/>.

Role of the researcher.

As a member of the executive education community for over 12 years, the researcher has deep knowledge of the strategic and operational aspects of executive education. Having worked in the capacity of an operations director as well as a lead program manager and client relationship manager, the researcher comes to this research project with an understanding of both the operational aspects needed for successful executive education program portfolio development and delivery, as well as an understanding of the customer service side of the business.

The researcher also has three years of experience working for one of the leading online university for-credit programs in the United States. With this experience, a deep

knowledge of the world of online education, albeit credit education programs, exists within the researcher.

It should be noted that the university in which the researcher has worked was not used as one of the sample universities in this study. Additionally, the researcher has gone to great lengths to bracket personal opinions when designing this research study and completing all of the necessary research (interviews and document reviews) in order to step outside of the study and remove any potential bias that may come from the researcher's personal connection to this topic.

Human subjects approval.

This research was subject to an exemption review by the Institutional Review Board (IRB) at The Pennsylvania State University (Penn State). The study was approved, and consent was received from the three universities involved to proceed with the research without a formal review from each of the universities' own Institutional Review Boards. Documentation showing this has been put on record with the Penn State IRB.

In order to protect the human subjects involved in this study, the individual identities of the interview subjects were held in the strictest confidence of the researcher. Access to the original data were limited to the researcher and committee members only.

Chapter 4 Data Analysis

This chapter consists of four sections. Sections one, two, and three are the within-case analysis for each of the three university executive education department case studies. Section one contains a case context and within-case analysis for the non-credit executive education portfolio at University A. Section two contains a case context and within-case analysis for the non-credit executive education portfolio at University B. Section three contains a case context and within-case analysis for University C. Each within-case analysis sub-section is organized by research question. Section four of this chapter presents the cross-case analysis, identifying common themes across each of the three cases.

University A

Case context.

The Executive Education Department at University A is housed within their School of Business. In 2008, the economy of the United States was waning, and a new market need began to be noticed by members of the leadership team. The leadership team at University A started to note a fear in their participants; no one wanted to be out of the office for weeks at a time, training budgets were being cut, and this was causing a significant drop in in-person enrollments in their executive education programs. Talks began to determine if there was a different way to deliver executive education using a different delivery method at a different price point.

In researching their competition, the management team noted that this new market need was not being serviced by others in the executive education industry and decided to begin the process of offering executive education programming in an online format, at a

lower price point than their current in-person, or face-to-face programs. So in early 2009, this small executive education shop out of University A became one of the pioneers in this form of delivery for executive education. By summer 2009 their initial catalog was ready to launch.

Today, executive education at University A offers seven online executive education programs. Three of the programs are also offered in-person, on campus. Table 4.1 depicts the current online executive education program catalog of University A.

Online programs are offered 2-3 times yearly, and are open for 3 weeks. Their in-person counterparts are 2-3 day resident programs. For those programs that are offered both online and in-person, the same teaching faculty are used for both offerings. In addition to the delivery style, the program closure date (the date when applications are no longer accepted for the program) differ between the online program and in-person program. Registration for the online programs closes at 5 p.m., one full day before the program's start date. For the in-person program, registration closes 2 weeks prior to the program's start date.

At the end of each program, both in-person and online, participants are asked to complete a program evaluation. According to the end-of-program evaluations, the in-person and online programs are equally well received by participants. As quoted by a senior member of the management team:

MT-1: "So we do the course evaluation of the online class in comparison to the course evaluation of the in-person, so for those three classes where we have both in-person and online, they all perform the same."

Table 4.1

The Online Executive Education Programs Available at University A

Program Title	Offerings in 2013	Online Cost	In-Person Cost
Effective Negotiations and the Power of Persuasion	Three times yearly (January, May, September)	\$595	\$1,450
Strategic Marketing	Twice yearly (January, May)	\$795	n/a
Understanding Finance and Accounting	Three times yearly (January, July, October)	\$795	\$1,950
Supply Chain Management	Three times yearly (February, June, September)	\$795	n/a
Strategic Management for Competitive Advantage	Three times yearly (February, June, October)	\$795	\$2,450
Effective Business Writing and Communications	Three times yearly (April, July, October)	\$595	n/a
The Leadership Course	Twice yearly (January, May)	\$795	n/a

Registration for each of the online programs is limited to 40 participants. In applying to attend one of the online executive education programs, the program participant agrees to the following responsibilities:

- Register for the program in advance
- Log in to the program during the session period, which comprises a defined 3 week calendar period
- Review the "Academic Instructions" prior to starting the program
- Complete each session's pre-work, reading and assignment before watching each session's video lecture
- Participate in the program discussion board

- Complete and return the participant program evaluation

Each of the online programs at University A contain online lectures and reading materials as well as homework and exercises. Lectures range from 30 to 75 minutes in length. Each program also has a discussion board, where interactive discussions between participants and faculty are held. Faculty have the following responsibilities:

- Faculty will guide the learning experience and answer all participant questions
- Since the online program is designed for participants to access the content at any time during the course session, faculty will respond to questions within a 48 hour timeframe
- Faculty will also post additional questions and schedule live chat sessions, and in some cases provide online guest speakers, throughout the program to further the comprehension of the subject

The following are listed as the technical requirements for any participant who signs up to complete an online executive education program with University A:

- Internet Explorer 6.0 or later, Internet Explorer for Mac, Safari or Mozilla Firefox
- Windows Media Player 6.4 or later
- Windows 98, Windows Me, Windows 2000, or Windows XP, OS X (Mac)
- Display resolution of 800 x 600 pixels or greater
- Windows-compatible sound card
- Broadband Internet connection (DSL or faster for live viewing)

Within-case analysis.***Selection, background of the interview subjects, and documentation examined.***

Two interviews were completed at University A. The first interview was completed with a senior member of the management team who has strategic responsibility for the online executive education portfolio. The second interview was completed with an Assistant Director of the Executive Education Department who has operational responsibility for the online executive education portfolio. Quotations from each interview will be used throughout this section, when presenting the findings as they relate to the research questions. Interviewee one is designated as MT-1 (management team 1); interviewee two is designated as MT-2 (management team 2).

In preparing this case, in addition to interviews, the university website was used to retrieve relevant documents and information concerning the development and operation of the current online executive education portfolio. Additionally, two sample program components were viewed, one in the form of a webinar and one using Mediasite. Screen shots from an active online executive education program using Epsilon were also reviewed. Lastly, an Internet search was performed to gain additional insights into the online executive education portfolio as represented in the popular press.

Research question 1: How is technology being used in online executive education programs?

At University A, commercially available technology is currently being used to deliver their online executive education portfolio. When the endeavor started in 2008-2009, the department began by using SharePoint as their content management system. In 2010, the university began using Epsilon for non-credit courses, and when that change

was made, the Executive Education Department also moved to Epsilen. In addition to using Epsilen as the content management system, the department used Mediasite for online video storage and Adobe Acrobat for viewing of PDFs.

In determining what technology to use, Executive Education Department personnel played a very small role.

MT-1: “We used whatever the IT team had available to us. So, it was actually great because we didn’t have to spend any additional money on a content management system, or on buying media sites. These are tools that our university or school already had available for us.”

MT-2: “For us, it really came down to what the school was able to provide. We didn’t have a separate budget to launch this. That’s why in the very beginning we were scrambling, trying to be as creative as possible to see how we could do this.”

Because of their low-risk, low-budget model, the team had to get creative with technology as they began to develop and launch their portfolio.

MT-2: “So, when we first started doing it on SharePoint, SharePoint itself is not designed to be a content management system, it is more of a website for a company to actually use to upload files to. So, we had to get creative, talk to the IT group about how to, what we were looking for and how this could work for us.”

MT-2: “I think because we weren’t given a separate budget for this, and we had to work with what we had, we made our courses work with what we had.”

Working now with Epsilen has proven to be a welcome upgrade at University A. Epsilen is a commercially available content management system and therefore contains all of the pieces that the department finds necessary to build and deliver their online programming. Programs are structured with a pre-work component, lecture component and a discussion board component.

MT-1: “So, if you are in the lessons area when you click on a lesson, it will have a write-up about any pre-work activity or assignments you need to have. So, I’m just going to make one up off of the top of my head. So let’s say you’re doing an integrated marketing lesson, then there may be, it might say “read chapters 3-6 of this integrated marketing textbook, watch the lecture, and then after you’ve completed doing the lecture, go to the

discussion board and give me your feedback on how this relates to the case study of Starbucks.”

In the interviews, two important areas of program structure emerged: the importance of the discussion board and the importance of the program manager.

MT-1: “So, the participant always has some type of activity that they’re working on where they are able to demonstrate their learning and understanding and then the faculty members can see via the discussion how they’re responding, how they are answering the questions.”

MT-1: “So, the program manager also is watching the board to see what questions are being asked, what activity is taking place. If the boards are quiet or they’re slow for a period of time, then the program manager will reach out to the cohort and say “I’ve noticed things have been quiet, perhaps you should log in or tell us what you’re thinking” or something like that. And then on the same side, they can also ping the faculty member and say “the boards look slow, make sure you contact the participants and get them engaged in the latest hot topic” or something like that.”

It is with these two features that the program experience is upheld; just as the classroom discussion engages participants and promotes learning and engagement in the in-person classes. Methods for keeping the participants engaged practiced by the program managers include posting announcements, having faculty post interesting facts or news, and sending emails to participants.

The programs at University A are structured as mostly asynchronous experiences, with participants working through program content at their own pace. This was a conscious decision of the department, feeling that the flexibility provided by asynchronous instruction was a selling point for this audience.

MT-2: “We knew that time was something that was a benefit for online programs, because they should be able to take it on their own free time.”

This benefit was balanced with the need for faculty interaction, using the discussion board to provide that faculty touch, while still keeping the flexibility of online learning.

MT-2: “They can watch lectures, read the material on their own during that 3 week period, but they still have access to a faculty member through the discussion board or forums or email. So that they still get their contact, their direct contact with the faculty to ask any questions they have or to progress. So, that was the middle ground we settled for.”

Research question 2: How was the online, non-credit program portfolio developed?

Research question 2.1: Who were the identified stakeholders, and what roles did they play?

There are six main stakeholder groups identified in the case study of University A, including:

- The management team of the School of Business
- The web development team
- The University Information Technology (IT) team
- The dean of the School of Business
- The Business School’s Corporate Advisory Board
- Faculty of the School of Business

The roles played by each stakeholder during the development of the online executive education program portfolio will now be presented.

The management team of the School of Business Executive Education Department consists of senior directors and associate directors from the business school, including the following positions: executive director, senior director of business development, director of business development, director of operations and program delivery, and the director of program design and development. The main role played by this team is program topic selection.

MT-1: “The management team is involved as far as saying ‘this is a course topic that we want to move forward on’.”

MT-2: “So, from the top level when the course is chosen, that’s from the management team. That would be all of the directors of our department who will have an interest and say, you know, what they’ve developed or heard from their clients, what would be a popular course from our alumni.”

The second stakeholder group includes the web development team. This is a small team, consisting of the director of program design and development and the assistant director for program delivery. The main role of this team is collaboration with other university departments for program design and faculty selection and prep.

MT-1: “We partner together to find the faculty, and then work with our information technology team that we have within the business school.”

MT-2: “We get the faculty up to speed in whatever way internally as well as what will be shown on the content management system.”

The third stakeholder group includes the University Information Technology (IT) team. The main role of this team is building and maintaining the electronic program content (taping the lectures, editing taped content, uploading electronic content and housing the data).

MT-1: “They (the IT Team) take care of all of the taping, the housing of the online data that we have, they do any edits that we need to the tapes. And then also the IT group gives access to the content management system as well.”

MT-2: “And then we also have our IT group who helps us to tape our faculty members, to set everything up on Mediasite and anything we need edited”

A fourth stakeholder is the dean of the School of Business. The role of the dean is to encourage and support collaboration. The model used at University A to develop online executive education is an extremely collaborative effort, involving numerous groups within the business school and using internally available resources. The dean’s

support and encouragement is necessary to make this form of collaboration accepted and successful.

MT-2: “So, the dean and his office were very supportive of this online program and they allowed us to work with other departments, such as the IT group, in order to make this happen.”

MT-2: “So, at that time, we were actually using all of the [University A] resources to tape, to actually content system management, so we were actually working with several different people in order to get this up. And they were happy to do so, because if they came from the overall umbrella, and from the overall umbrella it trickled down”

The fifth stakeholder group includes the University’s Corporate Advisory Board.

Their role is also one of encouragement and support. While leery of the choice to move into the online executive education market initially, they are now fully engaged and supportive of the effort.

MT-1: “Our corporate advisory board initially, so roughly 3 years ago or so, so initially they were very concerned about online activity and protection of the brand and how that plays into the consumers mind. But now they are totally bought into the online space and wanting us to do more and more.”

The final stakeholder group uncovered at University A includes the faculty, those who have decided to teach for the online executive education programs and those who have chosen to not participate. For faculty who have chosen to teach in an online program, their role is obvious, creating and delivering program content. For faculty who choose not to teach, their role is more of a support role (supporting the effort, supporting and encouraging other faculty to participate).

MT-1: “Another stakeholder I would say would definitely be the faculty. Getting them involved. And so I really felt as if I was on the campaign trail for a while because many of them did have reservation about teaching on the online space, what did it really mean, how would they be compensated, just a lot of questions were raised.”

MT-1: “We did have some faculty members who said ‘absolutely not, I would never teach in an online environment’ because they didn’t feel that they were suited to do so.

But they still, even some of the ones who said they personally didn't want to do it, they were still supportive of the activity.”

MT-1: “what I would just say are the success factors that we've noticed, and would vouch for, is definitely having faculty that can be your pioneers, help to spread the word for other faculty members, that has, that just goes so far without saying.”

MT-1: “I think the faculty to faculty, versus staff to faculty conversations are, can be much stronger because they want to have another person who is in their shoes, to be able to relate to their apprehension.”

When working to bring faculty into a teaching role for online executive education, coaching and proper support channels are necessary, in addition to early involvement. So in addition to their pioneer faculty, University A has found it necessary to have proper channels set up in order to build confidence in faculty to engage them in this effort.

MT-1: “We did have some faculty members who wanted to try it, but felt a little nervous about doing it. So, for those faculty members it did take some time, coaching, to make them comfortable, but now that they've done it and they see the end product, they actually love it, which is really good.”

MT-1: “once people understood the format and they knew that our production team was going to do the best job that we could to make sure that their teaching style was not compromised in any way, then they were ready to be on board.”

Research question 2.2: What tools were used to build the online community of learning?

To be successful in developing a true community of learning, University A has found that engagement is crucial, both getting participants engaged in the program initially and keeping them engaged throughout the 3-week offering period. In order to ensure engaged participants to build the online community of learning, University A has noted four critical tools, including having an active program manager, having an active faculty member, having an active discussion board culture, and using a well-developed

content management system that has the tools and features built in that fit with the needs of the program, the participants, and the faculty.

An active program manager, one with past experience and know-how, can easily work with participants to make them feel comfortable and engage them in using the tools provided in the program to create a community of learning. By watching the discussion boards, prompting when necessary, and managing the flow of the program, the program manager plays a crucial role in developing a successful community of learning for online executive education.

MT-1: “going back to what I was describing with the program managers, how they really work to make sure they are really engaged and involved.”

MT-2: “we know when it’s running really well. Especially get the content of the discussion boards, what kind of questions the students are asking the faculty members.”

Active faculty members are the next key in engaging participants and creating a community of learning. By responding to participants and engaging in conversation on the discussion boards, just as they would in a face-to-face classroom, the faculty member creates a community of learning for the participants of an online executive education program.

MT-1: “The faculty are very good at communicating with the students. Always responding, very responsive to them.”

MT-2: “When we first launched, we were looking at how the in-person programs were ready and why they were successful. And we knew that the accessibility to the faculty member is a key point in making the program successful.”

The tool used by both the program manager and faculty member in engaging the participants and therefore creating the community of learning in online executive education is an active discussion board, and an active discussion board culture within the

participant cohort. By encouraging participants to communicate both with each other and the faculty using the discussion board, the online learning community emerges.

MT-1: “the learning takes place definitely on the discussion boards because we, the faculty treat the discussion boards, they call it a forum, as an in-person type experience.”

MT-1: “So, whatever we would discuss and talk about if you were sitting in front of me, let’s talk about it in this online space. And they do a good job of communicating that way.

MT-2: “the biggest, I think, important piece that we needed for any content management system was to have a discussion board area where they were able to post things and to get people involved.”

Having the right content management system is the glue that holds this all together. By having a well-developed, well-fit content management system, the tools needed for the creation and evaluation of the community of learning are available and easily used by participants, faculty, and program managers.

MT-1: “The other thing with Epsilon that is different than say Blackboard or say some of these other tools that are out there, is once you have an Epsilon user account, you are a user for life. So, even though, for example with our courses, they are only available to you for 3 weeks, you still are able to access the, they call it the ePortal. So, basically access this online space. So, anyone that was in your class, even though the class is over, you still can connect with them and communicate with them through the Epsilon platform, which is very cool.”

MT-2: “[Epsilon] shows how much time they are actually spending in the course, and for all of our online courses, we break down the syllabus into how long the videos are, how long on average they should be spending on the reading. So, by looking at those hours and seeing how much time they’re spending on the course, it kind of gives us a report of how much they are completing.”

An interesting and unexpected trend was also noted when discussing this factor in successful online executive education. Not all participants of the online program are interested in participating fully and engaging in a true learning community. While initially about 50% of the participants fully participated and received a certificate at the end of the program, an equal percentage seemed to come in and out of the program, long

enough to gain the information that they needed and leave. While that ratio is now closer to 70 / 30, there are still participants (about 30%) who seem uninterested in completing the entire program.

MT-2: “After a year of running them, we did realize that usually 50% do participate in the discussion boards, but 50% it looks like they just want straight information. So, after having some data like that, it kind-of helped us to, not to be discouraged if the discussion boards were not as lively as we wanted them to be. Because some people, there just, maybe this is why they choose online programs. And they just want the information without the interaction.”

MT-2: “And what we did see, maybe some people didn’t even want the certificate. Maybe they just wanted a session or something because their time spent on the course was very little, but they still were willing to pay for the course and take the one session.”

Research question 2.3: What was the program design process from beginning to the time the program was delivered?

There was a 4-step research initiative and an 8-step program design initiative involved in developing the online executive education portfolio at University A. The process is detailed in Figure 4.1.

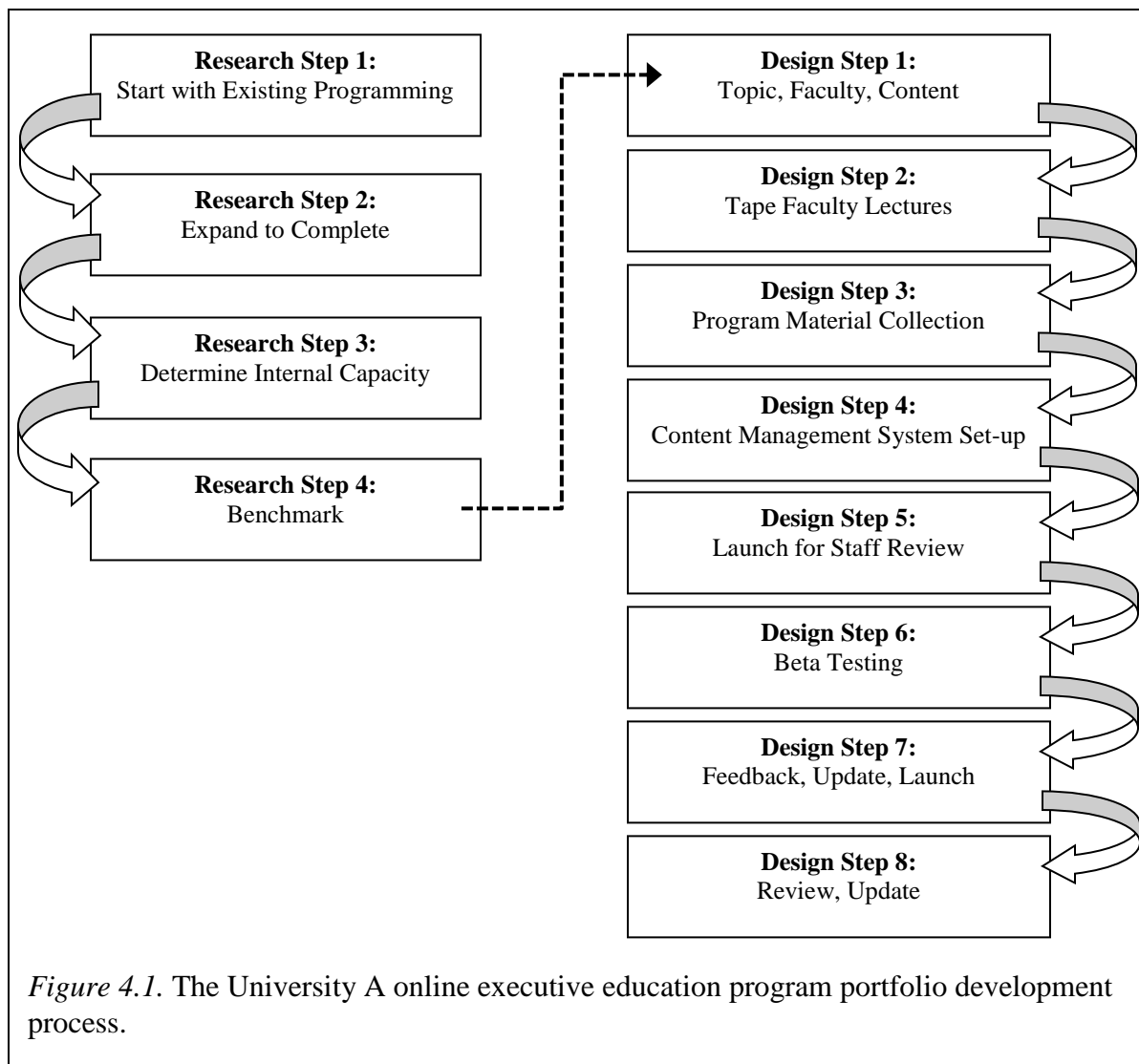
When it was determined that an online executive education portfolio would be developed, University A completed a four step research process.

Research Step 1: Start with existing programming to determine which programs in your current portfolio will best translate into the online space.

MT-1: “So, we started with our existing, in-person open enrollment courses. So, we looked at them and determined which one did we feel would translate well in an online delivery format.”

Research Step 2: Expand the portfolio developed by working with stakeholders to determine what is missing in the portfolio. Add any programming that has a market, even if you do not have an in-person counterpart to that program.

MT-1: “And then, we looked at, based on our catalog, which subject matters or topics were we missing and what should we create to round out our catalog of offerings.”



Research Step 3: Determine the capacity already available within your team, department and university in order to produce the online programming. Use tools that you have available, reducing risk and increasing speed to market.

MT-1: “We had people on our team who developed online courses before, so we pretty much had the knowledge in-house on how to do it. So, people brought in

past experiences from working in other organizations to actually develop our internal timeline.”

MT-1: “We would not have been able to do all of our online classes if we did not have an internal IT team that was ready to support us, if we didn’t already have a content management system that we were able to use. We would have had to essentially pay for all of that, and take on a larger risk than what we really had to in this particular case.”

Research Step 4: Benchmark what others are doing and how they are doing it. By testing out the products that other executive education departments have on the market, you can see what works, what does not work, what you can replicate, and what you should design differently in order to create a portfolio that is both user friendly and successful in creating learning outcomes.

MT-2: “we had the whole department take different online course offerings from different schools. This was for us to see how other schools were doing, and what we can do differently. I guess you can consider this part of our research process. We were very new to this online system, so we really needed to do our research in order to launch the right type of courses for our brand.”

After the initial research was completed, University A began developing programs. This design process is now used each time a new program is launched.

Design Step 1: Once a topic is declared, find the proper faculty to deliver the content.

Finalize the program content, making any necessary adjustments for online delivery.

MT-2: “So, it starts off with the idea of the subject matter that we want to offer and try to find the perfect faculty member who will do great online as well. So, that’s the first step, trying to get the faculty member and the new program.”

MT-2: “And then it’s up to the faculty member to give us their syllabus, knowing that this is an online offering, if they need to tweak anything that they have.”

Design Step 2: Tape the faculty lecture pieces of the program. This can be time consuming and should be started early to ensure that all pieces are ready when the program is ready to launch.

MT-1: “Then we work with the faculty for the taping of the online program, so all of the programs are taped first where the faculty come in, they have their content developed, and we do all of the videotaping that takes place.”

MT-2: “It usually takes around three different time slots of up to like six hours of recording.”

Design Step 3: Collect all additional program material, such as graphics, readings, and presentation slides from the faculty.

MT-1: “And then we gather all of their materials, so for example they may have case studies that we include in the online class, different graphics, other videos or forms of media. We collect all that, those materials, and then we set up in the learning management system the format for the online class.”

MT-1: “So, the faculty members, they actually don’t have to do anything with the technology for creating the class. Our team at executive education does all of that for them.”

Design Step 4: Set up the content management system with the faculty videos and program materials. Include a program evaluation in this step as well, in order to measure the participant perceptions of the program after they have completed it.

MT-1: “So we set that up in the content management system and then we spend the majority of that time organizing the class, setting up the discussion boards, making sure that, so for example, if the faculty member has a lecture that they teach, we have the supporting slides that go with it. Bringing in any external files, how we link them up in the class.”

MT-1: “And then once all of that is done, we set up a participant survey that is required to take at the end of every course, participants have to do that to receive their certificate of completion.”

Design Step 5: After all program materials are gathered, the program is ready for a soft launch, where it can be internally reviewed by university staff.

MT-2: “And then once everything is set, we have the staff review it first”

Design Step 6: After the internal staff review, beta testing is completed on the program by sending the complete program to past participants or corporate partners for a final review.

The program can be offered as a free offering, to incent those individuals to complete the program and offer useful feedback and critique.

MT-2: “and then we open it up for beta testing.”

MT-2: “for the beta testing, we usually send it to our contact who might be interested in our subject matter, either organizations that we’ve worked with before that this course might interest them. So basically we call our beta testing a free offering. That’s our enticement for them to actually take this and give us honest feedback so we can isolate problems for the course.”

Design Step 7: Any feedback received from beta testing is then evaluated and changes are made to the program, if necessary. The program is then ready for launch to the general public.

MT-2: “And after we get feedback, we make any changes to content as well as the structure if needed. And then we are launched.”

Design Step 8: Each year, it is necessary to review program content and make any updates necessary to keep the content and program relevant to the current executive education market.

MT-2: “And because this is a pre-recorded lecture, we definitely every year, every summer since ’09, we reevaluating every single course again. The specific content, and to make sure the faculty update any of the materials to anything more current if needed.”

University B

Case context.

The Executive Education Department at University B is based within their College of Business. Around eight or nine years ago (2003 – 2004), a strategic decision was made within the department that online executive education was a necessary piece of their executive education portfolio and that they should begin to explore what opportunities were available in that market. This decision came after industry trends

were noted, showing the movement of the practice of executive education to an online environment. These trends included seeing competitors trying to enter the online market, watching what was happening in the online realm both in education and elsewhere, and by consulting the popular press and seeing numerous stories related to the emergence of online technologies and the changes that such technologies would cause in everyday life.

After an internal review of the resources available to launch an online executive education portfolio, University B decided to partner with a for-profit entity (the Bisk Educational University Alliance Group) to provide all but the content needed for the online portfolio to be developed.

Currently, University B's Executive Education Department offers three executive certificates (each made up of three courses) and an advanced certificate (made up of one course) in an online format, taught by the same faculty who teach in the face-to-face executive programs offered on campus. Table 4.2 depicts the current online executive education portfolio of University B.

Online courses are offered beginning the first day of each month, and because of an abbreviated application process, participants can begin the course the month immediately following the month in which they register (for example, register in April and begin the course content May 1st). Each course is built with an estimated 25-30 hours of content, which includes up to 12 hours of streaming video presentations. Once course content is started, participants are given 8 weeks in which to complete all of the course reading, assignments, lectures, and open-book exams.

Table 4.2

The Online Executive Education Programs Available at University B

Certificate (Program) Title	Certificate Cost	Course	Course Cost, if taken separately
Executive Certificate in Negotiations	\$4,995	Negotiation Essentials	\$1,980
		Advanced Negotiations	\$1,980
		Strategies for Conflict Management	\$1,980
Executive Certificate in Leadership and Management	\$4,995	Effective Leadership	\$1,980
		Leading Teams and Organizations	\$1,980
		Executive Leadership Strategies	\$1,980
Executive Certificate in Business Administration	\$5,995	Principles of Business	\$1,980
		Disciplines of Business	\$2,280
		Applied Business Strategies	\$2,280
Advanced Specialized Certificate in Intercultural Management	\$1,980	Intercultural Management	\$1,980

Once registered for a program, participants receive a set of video CD-ROMs and a study guide which has been developed to compliment the online lecture material. Other programs resources provided by the University to online executive education participants include:

- The program's virtual classroom
- Online streaming video lectures
- MP4 video lectures
- MP3 audio lectures
- Participant and faculty email resources

- Program message boards

In addition to program resources, each participant is provided the following eLearning resources:

- Online faculty support through virtual office hours and faculty-monitored chat rooms
- A personal program representative
- Customer service and 24 / 7 IT support

At the end of each course, participants complete an online program evaluation, and pending review and confirmation that all course content has been successfully completed, a certificate and Continuing Education Units (CEUs) are awarded, 1.6 CEUs for each course completed.

The following are the PC hardware requirements listed for any participant who signs up to complete an online executive education program with University B:

- Pentium III 500 MHz
- Windows Vista, XP or 2000 operating system
- 256 MB RAM (512 or more recommended)
- 250 MB of hard drive space
- CD-ROM drive for DVD drive
- Super VGA or higher-resolution graphics card
- Internet connection (DSL, ISDN or cable modem recommended)
- 16-bit sound card with speakers or headphones

Software Requirements include:

- Adobe® Flash® Player 10.0 or higher

- Adobe® Acrobat® Reader® 6.0 or higher
- Internet Explorer® 6
- Windows Media Player
- Excel (or other spreadsheet program)
- Sun Java™ Runtime Environment
- 7-Zip

Within-case analysis.

Selection, background of the interview subjects, and documentation examined.

One interview was completed at University B with a senior member of the executive education team. Because of the partnership structure employed at University B (who partner with the Bisk Educational University Alliance Group to develop and deliver their online executive education portfolio) there is only one director-level staff member responsible for the online executive education portfolio, therefore only one interviewee was available. Quotations from the interview will be used throughout this section, when presenting the findings as they relate to the research questions. The interviewee is designated as EET-1 (executive education team 1).

In preparing this case, in addition to an interview, the University website was used to retrieve relevant documents and information concerning the development and operation of the current online executive education portfolio. Four online demo seminars were viewed using the same content delivery system as is used in the online executive education programs. Additionally, the University Alliance program catalogs were reviewed, and an Internet search was performed to gain additional insights into the online executive education portfolio as represented in the popular press.

Research question 1: How is technology being used in online executive education programs?

A proprietary content management system is used by the Bisk Educational University Alliance Group to deliver the program content produced by University B for their online executive education portfolio. Because of their decision to work with a partner to provide the online technology and expertise for their portfolio, the University was not involved in choosing the technology currently being used. Features such as discussion boards and email are reported to be a part of the system, but little more is known about the actual technology behind the interface.

MMT-1: “in the delivery of the program, this uses two systems and one of them is a customer management system or a content management system or something, where it includes discussion boards, it includes the ability for faculty members to accept and send emails, it allows us to communicate with the students during the class. They built that system, so I can’t tell you anything beyond that other than that it is a proprietary system that they have.”

Additionally, the Executive Education Department at University B uses the commercially available technology Elluminate Live in their online executive education programs. This technology is used by faculty to supplement the recorded content with live chats, either weekly or biweekly, as a voluntary part of the program.

EET-1: “Now, in conjunction with the recorded content, we do live chats, once a week, once every-other-week, depending on the program. And they use a system called Elluminate. That, about a year or so ago, was purchased by Blackboard.”

In order to receive their certificate, participants in the University B online executive education programs must complete the program by viewing and reading all of the recorded content, as well as passing an exam. The programs are designed to be completed in stages (so much in Week 1, so much in Week 2), but no check is made to ensure participants are keeping up on a weekly basis. Programs are seen as adult

education, so it is left to the participant to manage their learning and ensure they are getting out of the program what they need to be successful.

EET-1: “They have to complete the program, which means you have to have all of the recorded content read.”

EET-1: “The only thing that we do to make sure that they stay up, is that they have to take test periodically... You have to do the whole thing, content wise, to get to the end and finish your last exam.”

EET-1: “So, we know that they’ve completed the content. But, if they want, they can sit down and do marathon session, if they want to. It doesn’t matter to us. It’s their learning, they can manage it.”

Research question 2: How was the online, non-credit program portfolio developed?

Research question 2.1: Who were the identified stakeholders, and what roles did they play?

There are six main stakeholders identified in the case study of University B, including:

- Director of non-degree programs
- Program faculty (lead)
- Program faculty (supplemental)
- Associate dean of executive education
- Executive team
- Business School dean

The roles played by each stakeholder during the development of the online executive education program portfolio will now be presented.

The director of non-degree programs holds primary responsibility for operations of the online executive education program portfolio. Primary responsibilities include acting as the liaison with the University's partner (the Bisk Educational University Alliance Group), building the proper faculty team to develop program content, engaging faculty, building a financial business model that faculty and the university find agreeable, and reporting program progress to all stakeholders.

EET-1: "I was the primary liaison. My job was to find the faculty members who could do this."

EET-1: "So, we got them involved by saying 'Hey, we have this interesting opportunity, do you want to get involved?' So, if they said yes, obviously, that made it much easier because then what we could do is work with them on the design."

EET-1: "Now, we also had to be able to make it somewhat attractive to them financially, because that's part of the deal. You have to incent them to be able to participate."

EET-1: "But once we got involved with Bisk, I did it basically alone and just kept them up-to-date about what was going on."

The second stakeholder in this model is the lead program faculty.

Responsibilities of this individual include the bulk of the program design, orienting new faculty to the project when necessary, and managing the program flow during development.

EET-1: "So there was a primary faculty designer, who was involved in the process... he was very interested in the project, and he did the bulk of the design."

EET-1: "So, [the lead program faculty] would help orient them and make sure that there was decent flow and things like that."

Generally, faculty who engage in this role are individuals who are already familiar with executive education at University B. This has been designed purposefully, in order to more easily engage faculty.

EET-1: “But it is by far, overwhelming faculty that exec ed works with on the non-degree side all of the time...what I asked them to do was to teach the same content that they taught for me either in an open enrollment program or in a custom program. So they didn’t have to design anything new, because that’s a barrier to involvement for faculty.”

The third stakeholder in this model is the supplemental faculty. These are individuals who are not responsible for the majority of program design, but instead are brought in to fill in holes in the content when necessary. They do substantially less program design, but are still an important stakeholder in the development of each program.

EET-1: “Then, any other faculty who were involved, we approached to say ‘I need this small piece. Are you interested in doing it?’.”

The fourth stakeholders in this model is the associate dean for executive education, with the role of setting overall strategy for the department, which in this case lead to the push for an online executive education portfolio.

EET-1: “my boss is the associate dean, and was in charge of exec ed. Obviously, he was involved in the decision to go ahead and said yes because that was part of our strategy and he was involved in that design.”

University B also has an executive team, which shares the role of strategy planning. They, too, were aware of the project, as it pertained to the overall strategy of the department, but again, were mainly involved at a distance.

EET-1: “We have an executive team that can set strategy. They obviously knew what we were doing.”

The final stakeholder in this model, the dean of the Business School, is involved in setting the parameters of the engagement as new topics are initiated. The dean also participates by helping to support the engagement of University faculty in this initiative.

EET-1: “No involvement from the dean, other than some real clear direction after we got going, not upfront. But as we were presented more opportunities by Bisk to do different

topics, the dean said ‘We’re only doing stuff we do.’ Meaning, we’re not just going to put our name on something that somebody else’s faculty are going to teach.”

EET-1: “So, I got clear direction from the dean on that saying if we do something, every time we add a program, it’s got to involve some of our faculty.”

As for a budget model, University B has decided to institute a model where they pay faculty for their time when they travel to get filmed, and then pay royalties calculated using a simple mathematical equation which takes into account the number of participants in the online program and the percentage of time that the faculty member teaches on the program. This was created to keep faculty involvement as risk free as possible, while allowing for financial rewards if the program is successful. It also keeps the upfront cost of program production low, as faculty will not see a payout for intellectual property until the program runs, speaking again to the importance of having involved faculty stakeholders in this model.

EET-1: “I wanted to make it a risk-free opportunity for them, because I couldn’t tell them whether this was going to succeed or not. Or how much they would make, if they were willing to get involved. So, I paid them our normal daily rate, for a day, to go down for a day to be filmed. If it was two days, they got paid for two days.”

EET-1: “And then, what we said, ‘We’ll pay you a royalty based on two factors. One is how many people are enrolled in the class, and the second is what percentage of the class do you teach.’ So that becomes a straight multiplication issue obviously.”

EET-1: “But, we felt we needed to compensate them for the use and the reuse of their intellectual property. So, we treat it as a royalty.”

Research question 2.2: What tools were used to build the online community of learning?

To be successful in developing a community of learning, University B has found that communication is critical. Developing tools to allow for deep communications with participants at a distance has proven successful in developing communities of learning in

the programs. Live chats are used as an essential piece of each of their programs, as one tool to develop this sense of communication. In addition to live chats, some of the programs are designed to force participant collaboration with other members of the program.

EET-1: “But the best way, and the most consistent way across all of our programs, is the live weekly chats because that’s an hour long, and as many people who want to join them, do.”

EET-1: “on negotiations you can do it because we set up the process so that when you’re ready to negotiate, you enter your name into an electronic queue and the next person who comes in, you’re matched with that person to do the negotiation. So, that’s particular to negotiations. That’s one way, because you actually have to interact with somebody else in the class.”

Disappointingly to the program faculty, the live chats are not as well attended as they would hope. Again, because this is non-degree education, participation in the live chats is not mandatory for successfully completing the certificate program.

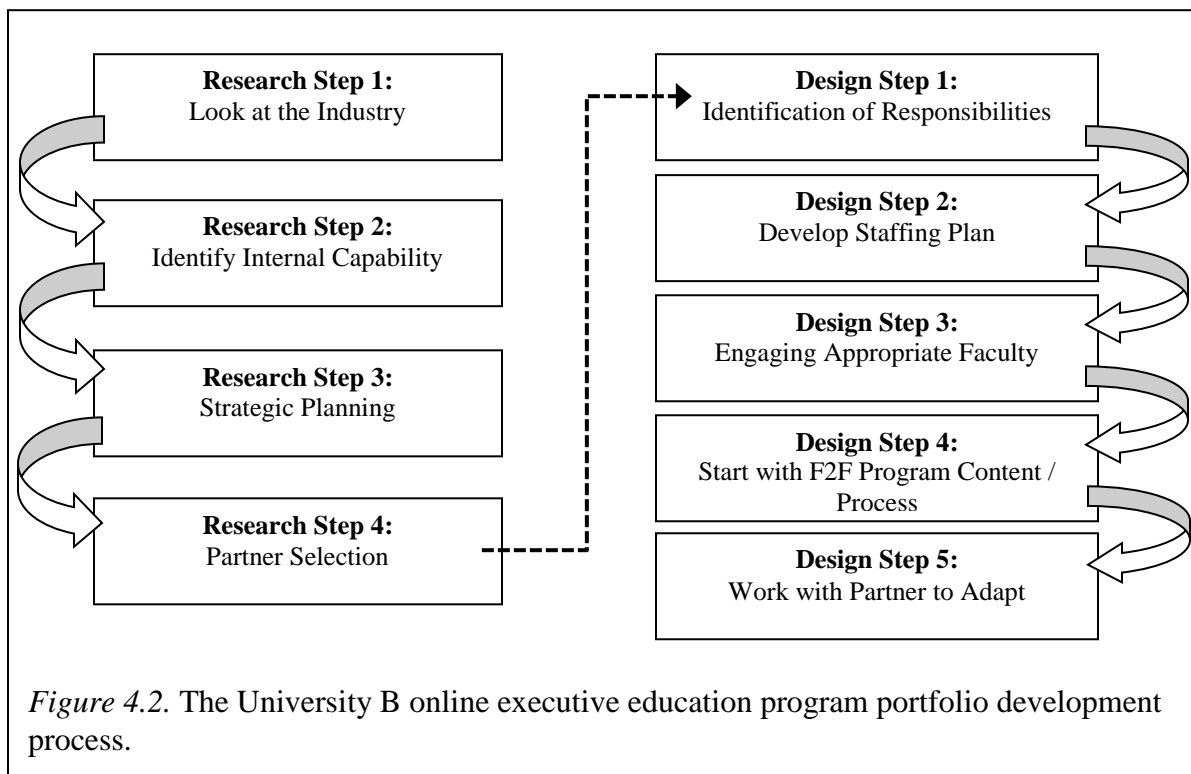
EET-1: “The disappointment of all of our faculty is that there is a very low participation rate.”

EET-1: “It’s not required. It’s non-degree, we cannot require it.”

Research question 2.3: What was the program design process from beginning to the time the program was delivered?

There was a 4-step research initiative and a 5-step program design initiative involved in developing the online executive education portfolio within University B. The process is detailed in Figure 4.2.

In determining if an online executive education portfolio would be developed, University B completed a 4-step research process.



Research Step 1: By looking at what was happening in the industry of executive education, both at competitors as well as the popular press, it was determined that online executive education was a necessary addition to the University’s program portfolio.

EET-1: “The big players in exec ed were all trying to do stuff on their own, so there were a lot of industry indicators.”

EET-1: “And there was a whole lot of stuff in the popular press, in trade publications, in meeting with our trade groups and things like that.”

Research Step 2: After determining that online was a desirable market, University B looked critically at their internal capability, and determined that they were not in possession of the expertise needed to launch an online program initiative.

EET-1: “So, part of our process is ‘Yes, online is important for us. We need to have some presence there.’ But we also knew that we didn’t have any expertise. Really zero knowledge or expertise on how to do this.”

EET-1: “But we knew that we couldn’t do it on our own. We didn’t have the capital to make the initial investment to do it on our own.”

Research Step 3: After considering the learnings from steps one and two, University B began by thinking strategically about where they were, where they wanted to be, and how best to get there. It was in this planning that the determination was made that University B was not going to be able to move forward on their own and a strategic partner should be brought on board to support this new initiative.

EET-1: “Knowing that the world was going in this direction, we’re not there, how do we get there? How do we get there relatively quickly? How do we get there tapping into somebody else’s expertise and infrastructure?”

Research Step 4: A partner was selected who complimented University B by being able to provide the needed expertise in the area of online education infrastructure that the university was lacking.

EET-1: “So, Bisk has instructional designers, they have a studio, they have editors, they have a proprietary platform that they can get information out to the students once they register. They have a contract with, at that point, Blackboard to be able to use that proprietary system for live online chats. They have a sales and marketing arm that they do all of that, they do all of the registrations, they collect the money, they do the fulfillment.”

EET-1: “that was very attractive to us because we have no upfront investment that had to be made and we leveraged their core expertise, and it allowed us to focus on our core expertise, which is content.”

After the initial research was completed, University B began developing programs in collaboration with their partner, The Bisk Educational University Alliance Group. As the online education expert, Bisk chose the initial program topic for the University, leaving University B to provide the program content.

MMT-1: “And Bisk, when they came to us, they said we’d like you to do an online negotiations and that worked because we have faculty members who do negotiations, so we could make that happen.”

Additional program topics have been added to the online executive education program portfolio, always nominated by Bisk and approved within University B if the University feels that the topic is relevant to their mission.

MMT-1: “Then we had discussions with them about, ‘ok, we would like to do more’ and our discussions always revolved around what is something that the college, what does [the Business School] have, that can make sense.”

Following this model of topic selection, the 5-step design process began.

Design Step 1: To create this successful partnership, the first step was to determine who would be responsible for what. In this model, University B develops the program content, while allowing their partner to handle the remaining details of creating the online executive education portfolio.

EET-1: “we provide content, they do everything else.”

Design Step 2: The first step in developing program content is to identify an appropriate staffing plan by determining what faculty will be involved in the program.

EET-1: “And then what we did, since the first program was negotiations, was internally to try to figure out ‘How do we make this attractive to faculty members?’”

Design Step 3: After determining appropriate faculty, it is necessary to actively engage each faculty member in the online executive education program development process.

EET-1: “And what we ended up deciding to do was to say ‘Let’s find out who of the faculty that teach negotiations are interested in doing something. Let’s try and make it as attractive and risk free of an experience for them as we possibly could’.”

EET-1: “So that, as you would imagine, actively engaged the faculty because they had to do the design. They had to tell us what they wanted to do, so then we could work with Bisk to make it happen.”

Design Step 4: Since University B had a long history of creating executive education programs, the same program creation process was used.

EET-1: “So, we look at this very much like we design regular courses or especially non-degree programs. What do we want to accomplish, how do we want to get there, what’s the right content to be able to make this work? What instruments can we use, what cases, what activities? How do we make that happen in an online environment? Those were all pieces of the discussion that we had amongst ourselves trying to figure out how to make this work.”

Design Step 5: The typical program design process was supplemented, when necessary, by bringing in expertise from the partner organization who had a deep knowledge of the infrastructure necessary to produce successful online education programs.

EET-1: “But working with Bisk is to say we need this as live, as close to a live classroom experience as we can because if people are going to negotiations, they have to be able to practice negotiating as part of the class. That was a little unusual for Bisk to be able to do that. And I’ll give them credit. They stepped up and helped us develop a system that allows us to have a, us to make that happen.”

EET-1: “So there was a structure that we needed it to fit in, which gave us some guidance obviously in our design.”

University C

Case context.

University C has a department specifically dedicated to the creation of online learning programs and courses. The team working in this department delivers all online education for the University, including their executive education. The 2008 economic change in the United States was the primary driver for University C to consider moving to using online delivery methods. This change caused a new market need to be vocalized by the University’s customers, leading to a customer service driven plan to develop learning experience that could be attained by participants without having to travel. The staff at University C heard clients saying that their travel budgets were cut, but they still had money for training and development, and so the idea for creating the department dedicated to the creation of online learning was born.

Today, executive education at University C offers three types of facilitated online professional development programs: online executive certificate programs, foundation courses for global business, and an oil and gas management program. All three types of online executive education are developed and taught by the same faculty who teach in residence at University C.

There are currently nine online executive certificate programs available as part of the professional development catalog. Table 4.3 depicts the current online executive certificate offerings of University C.

Each online executive certificate programs is made up of three executive certificate courses. Executive certificate courses are offered monthly, beginning on the first Monday of each calendar month. Executive certificate course are 8 weeks in length, with a total of 24 weeks of content available in each executive certificate program. Courses can be taken simultaneously, with a workload of approximately 2-3 hours per course. After completing each course, participants receive 1.5 CEUs.

Executive certificate course are made up of the following components:

- Video Lecture
- Podcasts
- Case Studies
- Multimedia Activities
- Quizzes and Checkpoint Questions
- End-of-Course Assessment

Table 4.3

The Online Executive Education Certificate Programs Available at University C

Certificate (Program) Title	Certificate Cost	Course	Course Cost, if taken separately
Executive Certificate in Global Business Essentials	\$4,455	Global Marketing Strategy Essentials	\$1,980
		Understanding Global Leadership	\$1,980
		Financial Essentials for Global Managers	\$1,980
Executive Certificate in Global Corporate Social Responsibility	\$4,455	Principles of CSR and Sustainability	\$1,980
		Strategic Applications of CSR	\$1,980
		Corporate Environmental Sustainability and Innovation	\$1,980
Executive Certificate in Global Finance	\$4,455	Financial Essentials for Global Managers	\$1,980
		Advanced Global Financial Management	\$1,980
		Elective Course	\$1,980
Executive Certificate in Global Leadership	\$4,455	Understanding Global Leadership	\$1,980
		Enhancing Your Leadership Strengths	\$1,980
		Elective Course	\$1,980
Executive Certificate in Global Marketing	\$4,455	Global Marketing Strategy Essentials	\$1,980
		Advanced Global Marketing Strategy	\$1,980
		Elective Course	\$1,980
Executive Certificate in Global Negotiations	\$4,455	Cross-Cultural Communication	\$1,980
		Essentials of Global Negotiations	\$1,980
		Managing Conflict with a Global Mindset	\$1,980
Executive Certificate in International Credits and Trade Finance	\$4,455	Essentials of International Credit and Trade Finance	\$1,980
		Advanced International Credit and Trade Finance	\$1,980
		Elective Course	\$1,980
Executive Certificate in Social and Voluntary Sector Leadership	\$4,455	Social and Voluntary Sector Leadership	\$1,980
		Enhancing Your Leadership Strengths	\$1,980
		Elective Course	\$1,980

Note. An Elective Course can be fulfilled by completing one course from a separate certificate program

One of the program requirements at University C is that all participants actively participate on an online program discussion board, requiring participants to post at least four comments on the discussion board for an 8-week course. Additionally, to complete the course and receive the course certificate, participants must complete the end-of-course assessment with a score of 70% or higher and an end-of-course survey.

One additional feature of the University's executive education portfolio is an online tuition credit opportunity. While the courses completed are not offered for credit, participants may apply up to \$5,000 of the executive education registration and course fees toward tuition for a select list of University C's degree programs.

There are currently 12 Foundation Courses for Global Business offered online as part of the professional development catalog at University C. Table 4.4 depicts the current portfolio of programs.

Each foundation course is typically completed in 1-3 weeks. The courses are on demand, so a participant is able to begin a course at any time throughout the year.

The Oil and Gas Management Program at University C is a 12-module certificate program made up of five content categories:

- Global Oil and Gas: Value Chain and Geopolitics of Oil
- The Upstream: Exploration, Development, and Production
- The Midstream: Markets and Transportation
- The Downstream: Refining and Marketing
- The Future Oil and Gas Industry

Table 4.4

The Online Foundation Courses for Global Business Available at University C

Course Title	Offered	Cost
Financial Management of Global Currency Exchange	On Demand	\$400
Global Finance Essentials	On Demand	\$400
Global Communications Essentials	On Demand	\$400
Global Strategy Essentials	On Demand	\$400
Seeing the Global Leader in You	On Demand	\$400
Global Customer Relationship Management	On Demand	\$400
Global Marketing Essentials	On Demand	\$400
Marketing for Global Entry	On Demand	\$400
Global Manufacturing Essentials	On Demand	\$400
Global Supply Chain Management Essentials	On Demand	\$400
Online GMAT Preparation Course	On Demand	\$750
Online TOEFL Preparation Course	On Demand	\$750

Each of the 12 modules in the Oil and Gas Management Program at University C run approximately 60 minutes and are on demand, so the certificate can be started by a participant at any time. Completion of the entire certificate usually takes 2-4 weeks. The cost for the Oil and Gas Management Program is \$2,900. After completing this certificate program, each participant receives 2.5 CEUs. Much like the executive certificate courses, the modules in the Oil and Gas Management Programs are built of:

- Pre-assessment questions to test participants' knowledge of the provided book chapter(s)
- Interactive exercises and business case studies

- Video presentations by University C faculty and subject matter experts
- Real-world business challenges
- Post-assessment questions

Within-case analysis.

Selection, background of the interview subjects, and documentation examined.

Two interviews were completed at University C. The first interview was completed with the person responsible for the development of the online team at University C who now has strategic responsibility for the department responsible for all online learning at the University. This person was responsible for developing the business model used to create the department and has built the department into what it currently is today. The second interview was completed with a Director in the department who was brought on as the first employee of the department once it was formed. Quotations from each interview will be used throughout this section, when presenting the findings as they relate to the research questions. Interviewee one is designated as OT-1 (Online Team 1); interviewee two is designated as OT-2 (Online Team 2).

In preparing this case, in addition to interviews, the University's website was used to retrieve relevant documents and information concerning the development and operation of the current online executive education portfolio. Additionally, one online Power Point seminar was viewed using www.slideshare.net and the presentation transcript was read. The seminar included videos which provided a sample of the Executive Certificate in Global Marketing, Global Marketing Strategy Essentials and the introductory module for the Certificate in Global Oil and Gas Management. All videos

were viewed. Lastly, an Internet search was performed to gain additional insights into the online executive education portfolio as represented in the popular press.

Research question 1: How is technology being used in online executive education programs?

University C has been involved in distance learning for many years, and has a background of trying different technologies.

OT-1: “we’ve gone through this continuum of different technologies from trying to build it ourselves, trying to have everything outsourced, trying to use, like you said, largely commercially available tools and then put our own spin on it.”

In the early 1990s, the University created a proprietary learning management system (LMS).

OT-1: “[University C] has been technically involved in distance learning I’d say since the late 90s. But we did have a proprietary LMS system...that we’ve since expired.”

Then, in the mid-2000s, when looking to develop a stronger distance learning presence, University C partnered with an education technology partner, The Bisk Educational University Alliance Group.

OT-1: “And we used to use the same educational technology partners that [University B] currently uses, Bisk.”

OT-2: “We were working with another institution, with Bisk, or University Alliance, and so we had courses online with them”

The relationship lasted for some time, but eventually University C decided they wanted to have more control over their online education portfolio, so the relationship with The Bisk Educational University Alliance Group was dissolved and they began to design programming in-house, hiring in technology partners to help with the development and design process.

OT-2: “And so it went that route, and our relationship with Bisk lasted quite a while and then it got to the point where we wanted more control over what was being done.”

OT-2: “And so, we started from scratch, creating content on our own, and have watched that increase and grow and become very successful.”

Currently, University C is using mostly commercially available tools, such as Moodle, to provide their online executive education. Within Moodle are numerous tools that University C uses heavily, such as quizzes, discussion boards, uploading capability, forums, and email blasts.

OT-1: “[University C] has its own instance of Moodle that we’ve customized.”

OT-2: “so within Moodle there’s a quiz feature, there’s a discussion board feature, there’s uploading capabilities for assignments or uploading into discussion forum, different types of question and answer discussion forums, email blast, all of that is kind of built into the LMS.”

Apart from Moodle, other commercially available technologies that are used include Tegrity lecture capture software and Kaltura for video hosting, as well as Flash interactives.

When deciding what technology to use at University C, budget played a role. The venture was not given a large amount of start-up money, so technologies that were already available at the University were chosen and aligned with the strategic direction that the University was already moving in.

OT-1: “Some of it was budget driven, to be honest with you... some of it was that the School had already adopted certain lecture capture software that it would make no sense for us to move away from that, as long as it was still working.”

OT-2: “We don’t have, or weren’t offered a very large budget to necessarily go seek out new technologies to use.”

OT-1: “Some of it is driven by the larger administrative decisions, like ‘What did we already purchase institutional licenses for’.”

OT-2: “So we’re using a lot of the same technology that the entire school is using, which offers some benefits of help desk issues and things. We don’t have to retrain a group just to answer question about our own content.”

In addition, the developers of University C's online programming department experimented and looked to the market to see what technologies were available to fit their needs.

OT-1: "Some of it was, you know, experimentation with our program development teams and things like that."

OT-1: "Going to different industry conferences and seeing what's available."

In the interviews, an important factor in program development emerged: the importance of using technology to properly enhance the learning experience, i.e. finding the right balance of interactives and simulations to make sure the program is seen, by the participants, as a rigorous executive learning experience.

OT-1: "We've really kind-of taken the columniation of corporate eLearning and academic eLearning and making sure there's just enough technology-based interactives and simulations"

OT-1: "We're really trying to make sure that they can, through the different technologies, they can feel the academic rigor that's behind it, and they can also understand the power of online learning."

Also important was the structure and size of University C itself. It was stated that the structure of University C allowed for the development of the online programming department. The size of the University is seen as a strategic asset, allowing them to be flexible and agile, and develop this new department.

OT-1: "we view our size as a strategic asset...we're able to quickly incorporate things that, without having to get lengthy approvals and things like that into our courses."

Research question 2: How was the online, non-credit program portfolio developed?

Research question 2.1: Who were the identified stakeholders, and what roles did they play?

There are six main stakeholder groups identified in the case study for University C, including:

- The team at the online programming department (directors and staff)
- University departments (IT, academic technology services, video services)
- Outside vendors, including instructional designer
- Faculty
- The executive team sponsor at University C
- The chief academic officer at University C

The roles played by each stakeholder during the development of the online executive education program portfolio will now be presented.

The team of the online programming department at University C consists of director and staff positions. As the lead department in charge of the online program delivery at University C, this group performs many roles, including sales / corporate business development, marketing, operations, guiding program development / project management, course management, program management, IT, acting as the faculty concierges, keeping executive sponsors informed, and collaborating with instructional designers, all to create a sound online executive education portfolio.

OT-1: “the whole course is guided through our staff”

OT-1: “our team, we were involved in every step of the way.”

The second stakeholder group identified includes different units within University C who are involved with the online programming team, support services such as IT, academic support services, and the video team. These stakeholders are used as support units to the delivery of University C’s programming.

OT-1: “we use some of the shared services on campus that are in IT and academic technology services (ATS).”

OT-2: “and then the video folks are just kind of in and out, and they don’t necessarily provide any feedback. They’re more or less just a service of, you know, ‘ok, here’s what you’ve asked for’.”

The third identified stakeholder group is outside vendors, including instructional designers. University C currently uses outside vendors to create cost-effective multimedia segments of their programs, and outside instructional designers to build the programs after content is received from the SMEs (subject matter experts). Outside instructional designers are also used to collaborate with program faculty, providing feedback on program content and flow.

OT-1: “So there are parts of the course that we outsource to different multimedia vendors and things like that. Things that we can find cost-effective solutions that are outside of the School without having to invest in a lot of staff.”

OT-1: “there are parts that we, going into the course, that we know we’re going to segment out and have partners work with us on.”

OT-2: “I think as far as the feedback piece, the instructional design teams that we’ve brought in are really the largest portion of that.”

OT-2: “So yeah, so I think those are the folks who really help guide the professors to get to where, like I said, where it’s best to add more content, to take things away, to ask perfect questions.”

The fourth identified stakeholder group at University C includes the program faculty. Faculty are used as SMEs for all of the University’s programming.

Additionally, they are the content owners and are heavily involved in the program development process, being the first stakeholder group brought in when a new program concept is being developed.

OT-2: “So, the professor is, like I said, fairly early on and it’s. We try and talk to the professor as much as we can and let them know it is their content and that they have the last say and ownership over that.”

The fifth stakeholder identified for University C is the executive team sponsor. The sponsor's original role included providing enthusiastic support for and being the champion of the development of the online programming department. Additionally, the sponsor aligns the views of the entire executive team so that they are prepared to run interference with naysayers when needed. In finding a sponsor, a past working relationship proved to be essential. The sponsor was engaged because of past experiences had with individuals on this new team, and those past experiences fostered success.

OT-1: "So, it was more of just making sure they were informed and they served as great champions throughout the executive committee and the board. Kind of ran interference for us."

OT-1: "he and I had worked already together for a couple years in different departments, and he was not only very sympathetic or very understanding of the plan that we were proposing, but he was a huge fan of educational technology and a proponent of things like social medias technology, etc. And it was pretty easy to get him to be on the same page with us and work with us."

The sixth and final stakeholder identified in this case is the University's chief academic officer (CAO). The CAO is responsible for providing brand assurance (i.e. making sure nothing being done within the online programming department would negatively impact the overall University brand), ensuring program quality and acting as another faculty liaison.

OT-1: "His primary focus was we had to stay very connected to the customer and make sure that none of the customer satisfaction were, none of satisfaction scores were degrading, or that our brand wasn't being diluted at all."

OT-1: "And he, also with his role with the faculty, he had to be really plugged into it because being in charge of the faculty and the academic side of the school, he had to be able to support it and if it wasn't working, he had to be able to say 'We have to make these adjustments or else stop doing it'."

Research question 2.2: What tools were used to build the online community of learning?

To be successful in developing a community of learning, University C has found that engaging participants is crucial. To foster an environment of engagement for participants, University C uses tools such as active facilitation and courses built with relevant and current content.

OT-1: “And as far as the learning community, I think it’s just the style that the facilitators use within the course to make sure that we’re, that they’re challenging each other.”

OT-2: “Encouraging people in that first week to post things that are more personal and, you know, to get to know each other. To try and create a network, a little bit, before they go into their content.”

OT-2: “And then also having that person there, a couple times throughout their program, allows them an outlet, and ensuring that there’s someone else there who is listening and watching out for what they are saying.”

Additionally, participants are encouraged to connect to the University community through staff providing active updates about events and inviting participants to attend select alumni association gatherings in their areas.

OT-1: “we’ll push content to the learners that is not necessarily related just to the course but things that are about [University C] events or different ways to connect to the [University C] community, even though they’re not on campus experiencing a degree program.”

OT-2: “we’ll connect them to the alumni associations where they’re living and things like that, if that’s necessary.”

Another engagement tool used by University C involves an active customer service experience philosophy. Participants are looked after and followed-up with systematically to ensure they are participating in and enjoying their online learning experience. These customer service touch-points include two phone calls from

University staff to each participant, in the middle and at the end of the learning experience and are seen as an essential piece of the program experience.

OT-1: “Some of it is, you know, we’ll notice certain behaviors in the learners. Maybe, they’ve purchased the course and registered, and they’ve not even seen the orientation or not even gone past that. So we have a, trying to increase retention and trying to increase engagement by just having someone that’s customer service focused call them. Not a sale, right? Not a collection effort or anything like that. It’s just you know, ‘We’ve noticed that you haven’t been able to log in, are you having problems, can I help you, is there any technical difficulties, do we need to do something to reschedule the session for you?’ things like that.”

OT-2: “We also call and have follow-up conversations with all of our participants, twice. Once in the middle of the course, and once after the course, to ensure that they’re not having any problems and to double check and make sure they’re enjoying the course and, you know, just as a touch point.”

These same staff members are also engaged with the University C faculty, making it easy for participant feedback to reach the individuals who have control over the learning content.

OT-1: “We, someone can literally get off the phone with a customer and the next meeting might be with a faculty member that has built that course and we can share, you know, ‘That’s the third or fourth comment that I’ve heard about this quiz’ or ‘I think when you deliver this video, they are still kind of hung up on this topic’,”

Tools available through the LMS (Moodle) also ensure engaged participants.

Discussion boards where participants engage in talk around program content and answer content focused questions are a required piece of each online executive education program.

OT-1: “In Weeks 1, Week 4, and Week 8 they’re [discussion boards] required...there are specific content related questions and assignments that they work through in those three weeks out of each course [on the discussion boards].”

OT-2: “That’s also a requirement for completion, is that you have to post twice in the fourth and the eighth week of content, which is when that facilitator is there.”

Even though the programs at University C are structured in a mostly asynchronous way, there are features that allow participants to feel that they are part of a truly engaged learning environment. Additionally, there is talk of adding synchronous facilitator interaction in all online programming at University C, if questions of scalability and reaching a global audience can be resolved.

OT-2: “The other thing is the way we’ve phrased everything in the course. And trying to create, I don’t want to say, the only word that’s coming to my mind is false, but false ways of a community. So, in some of the interactives you move through and you answer the content or you put things in different categories and in the next screen, you’re comparing it to the professor.”

OT-1: “What we’re moving toward at the School is, our chief academic officer right now is really, really pushing that feature [synchronous facilitator interactions] and really wanting that to be in a lot of the courses, really wanting that to be a part of a lot of the course, so I’m sure that will change.”

Research question 2.3: What was the program design process from beginning to the time the program was delivered?

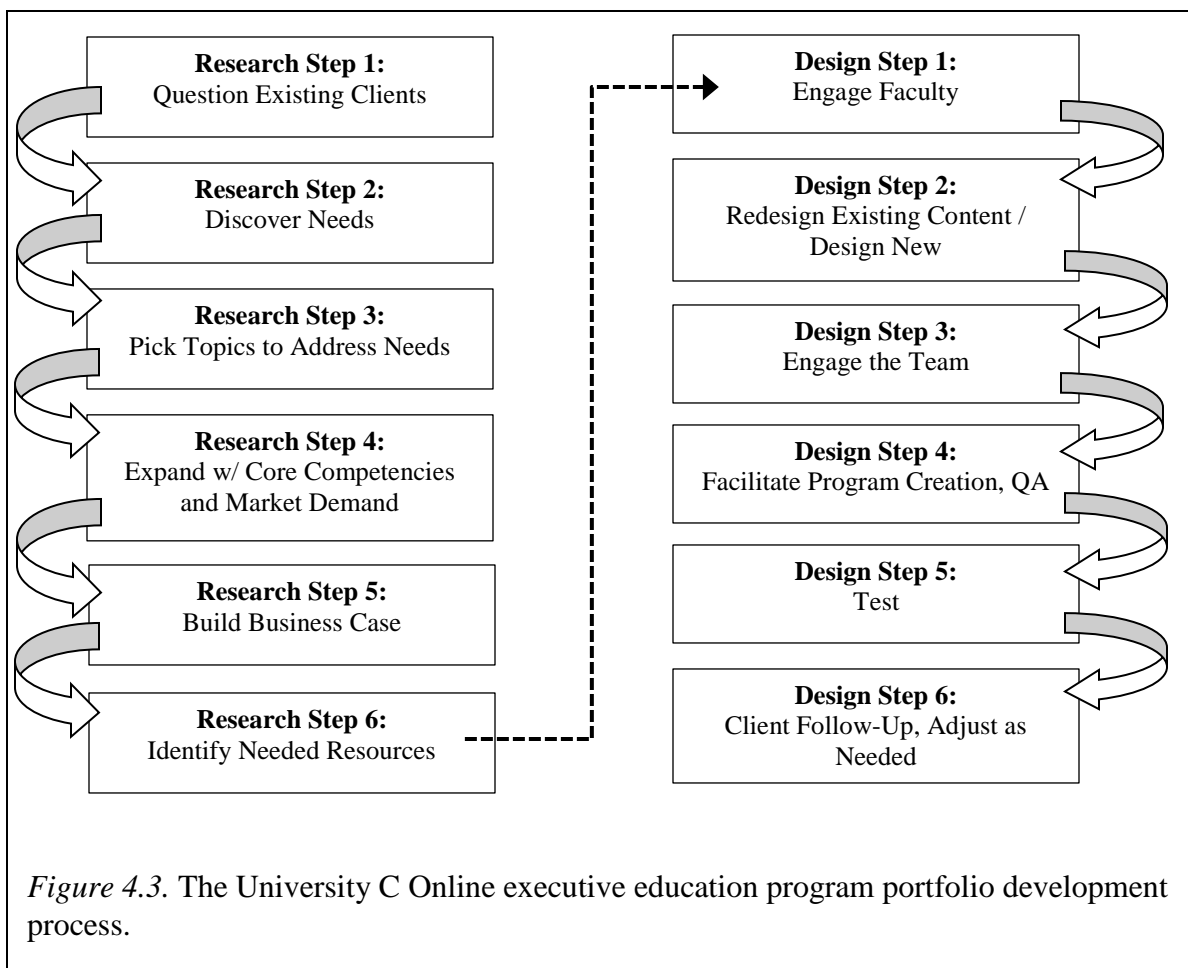
There was a 6-step research initiative and a 6-step program design initiative involved in developing the online executive education portfolio at University C. The process is detailed in Figure 4.3.

A 6-step research process lead to the development of the online programming unit at University C.

Research Step 1: Start by talking to your current participants and corporate partners.

OT-1: “I wrote the business plan basically to start [University C’s online programming unit] in our fiscal year ‘09-‘10 after hearing quite a bit of information from perspective participants that we were working with in the traditional executive education programs.”

OT-1: “We heard the demand for certain topic areas but more importantly there was a demand for delivery methodology.”



Research Step 2: Use conversations with current participants and corporate partners to identify their needs.

OT-1: “So, we needed something where working professionals that were not interested in seeking a degree program, and that were not able to come to campus, could find something maybe in the middle for them.”

OT-1: “So they could still find a way to re-up their credentials and stay competitive in their workforce without having to come to campus.”

Research Step 3: Once the needs of the market are determined, select topic areas that address the market need, while keeping in mind what will work well with an online delivery method.

OT-1: “And as far as related to topic areas, we think there are some topic areas that lend themselves better to online delivery.”

OT-1: “We felt that we had enough capabilities on campus to kind of slowly build the case for this by letting the market decide if it would work or not.”

OT-2: “And then, like I said, past that it’s been looking at the market and seeing what might be interesting to put online.”

Research Step 4: Expand the program portfolio to include program topics where the University has content competency, again, keeping in mind the market need for such education.

OT-1: “But now what’s happened since we have a much bigger portfolio than we started with a couple years ago. It’s a mixture of topic areas that [University C] is differentiated on and faculty availability and then obviously it’s market sensing.”

OT-2: “When we started creating these, initially it was which professor would be willing and had the foresight to want to be putting content online.”

Research Step 5: Using the market knowledge and program topic knowledge gained in Steps 1-4, build the business case for the development of an online portfolio within the University. Rely on past experiences and resources university-wide to gain buy in to the business model and build support for the venture.

OT-1: “So when we were hearing these different demands from the customers, once I was able to build a business case”

OT-1: “I also had my own personal experiences with [University C] and [University C] systems, I mean programs and different faculty styles, things like that.”

Research Step 6: Once the business case is built, identify what resources will be needed, identifying both internal and external partners, in order for success.

OT-1: “ rally the right resources around it”

After the initial research was completed, the department was formed and the program development phase started. Initially, the program development process involved

a much more hands-on approach by an in-house instructional designer. After the first few programs were designed, it was decided that the process must be updated to put the lead faculty member (i.e. the SME) in charge of development of the program. After this decision was made, the process was updated and is still used each time a new program is launched.

Design Step 1: Determine the proper SME for the chosen program topic and engage that faculty member by explaining the process and encouraging them to talk to others who have participated in the past.

OT-1: “So when we launched, our first in-house track was the executive certificate in global negotiations. And what I did is that I went to Professor [*exact name redacted*] and Professor [*exact name redacted*] and, because of the social capital that I had built up with them through my role here at [University C] and also because of my perspective with them as a student. It was really just trying to tell them ‘I think you’re onto something with this topic area. We like the way that you did the online delivery and we think that we can do a few things differently to really make it appeal better to a working professional audience’.”

OT-2: “So our structure after those first three courses and currently is to work, choose a professor, talk to the professor upfront about exactly what it’s going to take.”

OT-2: “So, we talk to professors, you know, figure out contractually what they’re going to be doing and what the content will be.”

OT-2: “And also, as there are more and more faculty that have gone through the process, they talk to one another and we encourage them to go and talk to the professors before they’re able to start.”

Design Step 2: Design the program content, or reform content already being used in the for-credit or face-to-face programs to fit into a program that will meet the expectations of an executive audience.

OT-1: “make sure that we were sensitive to the schedule of working professionals, the time that we thought they could spend per week on the course. And still have them feel like they got the academic rigor and the, you know, the academic muscle behind a name like [University C].”

OT-1: “You know, maybe shortening the content from a full, traditional academic 12-weeks term, to an 8-week term.”

OT-2: “And then have them write an 8-week outline, since all of these courses, most of the ones that we’re developing are 8 week. And outline topical objectives and whatever content, so covered materials, videos, whatever they would like to use within that structure. And as much other supplementary materials, if they have a power point presentation that they would be doing in a video lecture. Providing all of that upfront.”

Design Step 3: Engage the team needed in order to develop and launch the program including program managers, instructional designers, external corporate partners and design companies (examples used by University C include Element K, Skill Soft and Allen Interactions).

OT-1: “We employed a couple of contracted instructions designers that we had worked with before in the corporate learning space they came into the studios with us as well and helped us make the changes to the learning management system and upload the course and really figure out the model that we use right now.”

OT-2: “external providers, to help us with the instructional design and also developing interactives or flash click-throughs, multimedia pieces to help give an additive value to the content.”

OT-2: “And then we have a face-to-face meeting with the instructional designer that we’ve contracted with, the company. And usually that’s face-to-face, where we go through then all eight weeks of content and make sure it’s neither too heavy or too soft as far as the amount of seat-time that it will be.”

Design Step 4: The online programing team at University C is then in charge of facilitating the creation of the program, including facilitating the creation of videos, discussion questions, evaluation questions, and all other aspects of the online executive education program. Quality assurance is performed throughout the creation process to ensure that a high quality learning experience is developed.

OT-2: “And then we just dive right in. The professors usually take on creating all of their videos, and we help facilitate them getting the space to create their videos.”

OT-2: “And so, figuring out this process that works for us and gets us to the end result that we want, even though a lot of instructional designers are used to getting a bunch of content and saying, ‘ok, here make a course out of this content’.”

OT-2: “This is really, very much an iterative process for us with the SME and the instructions designer and kind of my team, as a middle man.”

Design Step 5: Best testing is completed during the program’s first running by using the faculty SME as the facilitator and also providing seats in the program for University C staff. This provides both staff training and quality feedback to the online programming team so the program content can be updated for future sessions, if needed.

OT-1: “when we launched the first course we actually went to the, our HR department internally and offered the courses as employee development for people on the campus. And we did that for two reasons. One, because it was a pretty low cost way to develop [University C’s] employees in different departments and get everyone kind of talking about educational technology and experiencing it. Getting them on the same definitions and the same terms. And then also because there is no better way to test it with a customer than to have it be kind-of a low risk exposure through your employees.”

OT-1: “We thought it was a pretty good way to use an organic QA [quality assurance] for us, without having to spend a lot of money.”

OT-2: “They’re probably more critical than our consumers, when we put staff from other departments, because they have a level of expectation. And so that’s been an interesting thing to watch.”

OT-2: “that the professors is the facilitator for the course, and so. To make sure that people don’t have additional questions that weren’t covered in the material and that kind of thing.”

Design Step 6: After launch, programs are continually evaluated using client feedback and updated when necessary to stay relevant.

OT-1: “And then we were really in-tune, and we remain really in-tune with all of our clients that go through the course.”

OT-1: “We’ll ask them, ‘Are the frontline managers of the people who are going through these courses, are they hearing, you know stories, of ““Oh, I went to this course and it helped me to X, Y, or Z better at work the next day?”””

OT-1: “it helps us better serve the next corporate client because we’ll be able to anticipate the things that are really really working well in the workforce and the things that we can improve on that.”

Cross-case Analysis

As discussed in Chapter 4, there are two major approaches generally accepted as suitable ways to perform a cross-case analysis, variable research and case-oriented research (Khan & VanWynsberghe, 2008). “In variable-oriented research, variables take center stage” (Khan & VanWynsberghe, 2008, Section 3, para. 1). Using this approach, the researcher tends “to pay greater attention to the variables across cases rather than the case itself. Variables are compared across cases in order to delineate pathways that may have led to particular outcomes” (Khan & VanWynsberghe, 2008, Section 3.2, para. 8). “In case-oriented research, commonalities across multiple instances of a phenomenon may contribute to conditional generalizations” (Khan & VanWynsberghe, 2008, Section 3, para. 1). As case-oriented analysis is meant to compare cases on the whole looking for similarities, “special emphasis is given to the case itself instead of on variables across the case.” (Khan & VanWynsberghe, 2008, Section 3, para. 1).

Since the unit of analysis of this research is a process, and variables of the process developed at each university have been explored, variable-oriented research methods have been used to complete the cross-case analysis. For each research question, the variables discovered at each university have been summarized and charted for direct comparison.

Research question 1: How is technology being used in online executive education programs?

The variables that have been compared to answer research question 1 include technology type (commercially available versus proprietary technology), the content management system, other technology being used in addition to the content management system, why the executive education department decided to use the stated technology, important features of the technology, and the participant learning style (asynchronous learning versus synchronous learning). The comparison of these variables is summarized in Table 4.5.

Table 4.5

Cross-Case Variable Analysis: How Technology is being used in Three University Executive Education Departments

University	Technology	Content Mgmt.	Other	Why	Important Features	Style
University A	Commercially available	Sharepoint, Epsilen	Mediasite, Adobe Acrobat	University partners	-Pre-work -Video lecture -Discussion boards -Program manager	mostly asynchronous
University B	Proprietary	Proprietary to Bisk	Elluminate Live	Commercial partner	-Virtual classroom -Online streaming video lectures -MP4 video -MP3 audio -Email -Message boards -Virtual office hours -Faculty-monitored chat rooms -Personal program representative -24 / 7 IT support	mostly asynchronous
University C	Commercially available	Moodle	Tegrity, Kaltura, Flash Interactives	University partners, Commercial partners	-Quizzes -Discussion boards -Uploading capability -Forums -Email	mostly asynchronous

Research question 2: How was the online, non-credit program portfolio developed?

Research question 2.1: Who were the identified stakeholders, and what roles did they play?

The variables that have been compared to answer research question 2.1 include the identified stakeholders within each university. In addition, the description of the role that each stakeholder played was examined. The comparison of these variables is summarized in Table 4.6.

Table 4.6

Cross-Case Variable Analysis: Stakeholders and Role as Identified by Three University Executive Education Departments

University	Stakeholder	Role
University A	Business school management team	Topic selection
	Web development team	Program design, Faculty selection and prep
	University IT team	Building/maintaining electronic program content
	Business school Dean	Encourage and support collaboration
	Business school Corporate Advisory Board	Encouragement and support
	Business school faculty	Creating and delivering program content, Encouragement and support
University B	Director, Non-Degree Programs	Complete operational responsibility
	Lead program faculty	Program development and design, Coaching new faculty
	Supplemental program faculty	Fill in content holes, when necessary
	Associate Dean, Executive Education	Setting strategy
	Executive team	Setting strategy
Business school Dean	Setting parameters for projects, Encouragement and support	
University C	Online team	Operational responsibility
	University departments	Support for program delivery (IT, Video)
	Outside vendors	Creating select program content, Provide feedback on program design
	Faculty	SMEs, Content owners, Program development
	Executive Team Sponsor	Encouragement and support
	Chief Academic Officer	Providing brand assurance

Research question 2.2: What tools were used to build the online community of learning?

The variables that have been compared to answer research question 2.2 include the tools used to build the online community of learning within each university. The comparison of these variables is summarized in Table 4.7.

Table 4.7

Cross-Case Variable Analysis: Tools Used to Developing an Online Community of Learning as Identified by Three University Executive Education Departments

University	Tool Used	Why Important
University A	Active Program Manager	Creates participant engagement through making them feel comfortable
	Active faculty members	Creates participant engagement through interaction
	Active discussion board culture	Encourages engagement by providing a place for discussion between participants and between participant and faculty
	Using a well-developed content management system	Tools and features that fit the needs of the program, participants, faculty
University B	Live chats	Allows for deep communication between faculty and participant
	Collaboration exercises	Allows for communication among participants
University C	Active facilitation	Creates participant engagement through interaction
	Courses built with relevant/current content	Creates participant engagement through content
	University connection	Creates a feeling of engagement through a common love for the university
	Active customer service	Creates participant engagement through making them feel comfortable
	Active discussion board culture	Encourages engagement by providing a place for discussion between participants and between participant and faculty

Research question 2.3: What was the program design process from beginning to the time the program was delivered?

The variables that have been compared to answer research question 2.3 include the program design process used within each university, including both the research and

program design steps completed. The comparison of these variables is summarized in

Table 4.8.

Table 4.8

Cross-Case Variable Analysis: Program Research and Design Process Used to Develop the Online Program Portfolio as Identified by Three University Executive Education Departments

University	Research Step	Program Design Step
University A	1 Start with existing programming	1 Determine topic, select faculty, finalize content
	2 Expand to fill in programming gaps	2 Tape faculty lectures
	3 Determine internal capacity to produce program	3 Collect all needed program material
	4 Benchmark others in executive education	4 Set-up content management system
		5 Launch for staff review
		6 Beta testing
		7 Analyze feedback, update program, and launch
		8 Yearly program review and updates
University B	1 Benchmark others in executive education	1 Identify university/partner responsibilities
	2 Determine internal capacity to produce program	2 Develop staffing plan, who is involved
	3 Strategic planning, "How can we make this happen?"	3 Engage appropriate faculty
	4 Research options for partnership	4 Start with face-to-face content and process
		5 Work with partner to adapt process where needed
University C	1 Question existing clients	1 Select and engage faculty
	2 Discover needs	2 Redesign existing content or design new content
	3 Pick topics to address needs	3 Engage the program operations team
	4 Expand with core competency and market demanded programs	4 Facilitate program creation, ensuring quality
	5 Build business case	5 Testing
	6 Identify needed resources	6 Program review and updates

Chapter 5 Study Summaries, Conclusions and Recommendations

Study Summaries

The purpose of this study was to investigate the process used by three university executive education departments in the United States to develop online executive education portfolios. The research questions were as follows:

1. How is technology being used in online executive education programs?
2. How was the online, non-credit program portfolio developed?
 - a. Who were the identified stakeholders, and what roles did they play?
 - b. What tools were used to build the online community of learning?
 - c. What was the program design process from the beginning to the time the program was delivered?

The study was guided using the conceptual framework of the Soft-skills Learning Triangle (SLT). The SLT was selected because it is “a model created to help coaches, mentors, and educators understand how web-technologies can be used to support management learning and soft-skills development” (Adams, 2010, p. 437). Using a collective case study design, three universities in the United States were studied in the fall of 2012. The data collected included interviews as the primary data source, and numerous secondary sources:

- Reviewing each university website
- Viewing sample or demo programs
- Reviewing screen shots from active programs
- Reviewing information about each university in the popular press

- Reviewing the program catalogs (used as advertising for the online executive education program portfolios)
- Viewing a power point seminar and reading the seminar transcript describing one university's online executive education program portfolio
- Viewing videos which provided sample program sessions

In order to enhance the research quality, the researcher performed data triangulation. Data from multiple sources was collected in order to provide collaboration of facts and create a converging line of inquiry (Yin, 2003; Patton, 1997). In the cases where two or more individuals were involved in the non-credit executive education portfolio development, interviews were completed at the first and second positions within the university department. As this is a cross-case analysis of the development process undertaken at three different universities in the United States, the case study design also allows for triangulation between the three different universities by identifying repeated themes found within each single case analysis (Miles & Huberman, 1994).

After the interviews were completed and recorded, they were transcribed and cleaned. Interview transcriptions were sent to the interview subjects for review with any additional follow-up questions. Any responses that were received were added to the interview theme tables and all data were coded. Coding was performed by the researcher. One additional person read the interview transcripts in detail in an attempt to provide verification of the information as it was interpreted by the researcher in the theme tables. It was determined that since the unit of analysis for this study was a process, the data represented a straight forward process with little room for interpretation, and as such, one cross-check of the coding in this manner was sufficient. The codes were then used to

develop a case study report for each university, answering each of the research questions. The individual case study reports were sent to the top position interview subject for review. If any comments were received, they were incorporated into the final case study reports. Following the within-case analysis, data from each case were put into summary tables to perform the cross-case analysis, where common themes from each of the cases was reviewed.

Another important test in developing a quality case study is reliability. “The goal of reliability is to minimize the errors and biases in a study” (Yin, 2003, p. 37.) As such, a case study protocol was followed and a case study database was created by the researcher. The case study protocol for this research can be found in Appendix A. The case study database for this research can be found at

<https://protected.personal.psu.edu/a/1/alm251/ePortfolio/>.

Conclusions

In this section, study findings are compared between the three cases, as well as with the literature reviewed.

Research question 1: How is technology being used in online executive education programs?

According to the literature review, distance learning is becoming a necessary part of learning in general. While there are still few cases in existence of university executive education departments using distance learning to completely delivery their executive education portfolio, the literature tells us that this trend has been on the horizon of executive education at least since the late 1990s (Vicere, 1998; Crotty & Soule, 1997; Conger & Xin, 2000). Additionally, numerous case studies have shown that distance

learning is valued by corporations and can be a successful way to deliver corporate learning (Bonk & Kim, 2005; Morgan, 2001; Coates & Taylor, 2002; Bonk, Olson, Wisher, & Orvis (2002); Saltzman, 1997; Strother, 2002; Gunawardena, Linder-VanBerschoot, LaPointe, & Rao, 2010; Paulsen, 2009; Berge & Kearsley, 2003; Marçal & Caetano, 2010).

In looking at Table 4.5, which represents the findings from this research conducted on three United States' universities, a mixed picture emerges of how technology is currently being used by these executive education providers. Two of the universities are using commercially available technology, such as Sharepoint, Epsilen, Mediasite, Adobe Acrobat, Tegrity, Kaltura, and Flash Interactives to deliver their content, while one university is using a proprietary technology owned by their partner. Therein lays the differentiator. It is not whether a university is providing distance learning opportunities, but how they have decided to offer those programs. In University B, it was determined that partnering with a for-profit entity (the Bisk Educational University Alliance Group) was the most beneficial way to produce their online executive education portfolio. In universities A and C, university internal resources were used and an internal team was created to produce the online executive education program portfolios. This necessitated that University A and University C use what technological resources they had available to create their portfolios, while University B deferred the choice of technology to their partner.

In all three cases, asynchronous learning is the predominant style in which the online executive education program portfolio is delivered. This makes good sense, considering one of the main benefits of using online learning is convenience, i.e. being

able to learn when it is convenient for the learner as opposed to forcing learning to happen in a pre-determined time and in a pre-determined place.

In all three cases, one important feature of the online executive education programs came out of the research, the use of a discussion board or faculty monitored chat rooms. In addition, in two out of the three cases, it was specifically mentioned that having a dedicated program manager, or personal program representative, was a critical pieces of making the online executive education program a success.

Research question 2: How was the online, non-credit program portfolio developed?

Research question two was broken into three parts in order to gain insight into the program development process. Information was collected in regard to the stakeholders involved in the process, the tools used in the process of developing an online learning community, and the step by step program development process. Each of these three areas will be discussed in greater detail in the following sections.

Research question 2.1: Who were the identified stakeholders, and what roles did they play?

No literature was found that outlined the necessary stakeholders to involve in the online executive education program development process. As such, the researcher depended on the interviewee to establish the following list of stakeholders and roles.

As summarized in Table 4.6, stakeholders from the three universities can be broken into numerous groups. In all three universities, members of the business school senior leadership team (business school dean, business school management team, associate dean of executive education, university executive team, university chief

academic officer) were involved. In all cases, members from this level were involved with program topic selection, encouragement and support of collaboration, setting strategy and program parameters, and providing brand assurance.

A second stakeholder group that was involved in all three cases included university faculty. In all cases, the role of the faculty stakeholder included creating and delivering program content (SME) and providing encouragement and support, as well as coaching new faculty when bringing them into the online program process.

In two of the cases -- those two that did not partner with an outside partner to produce the online executive education program portfolio -- a third stakeholder group of key university departments was identified. This group included members from teams such as web development and IT support. The role of this stakeholder group was mixed. In one university, the web development team assisted with program design and faculty selection and prep, as well as building and maintaining the electronic program content. In the other case, the university departments acted only in supporting the program delivery role by providing support for the electronic program content (IT, video).

Each university also noted one stakeholder who was not noted by any other. For University A, the business school's corporate advisory board played the role of encouragement and support. In University B, the director of non-degree programs was noted as a stakeholder with the role of complete operational responsibility for the portfolio. And at University C, this same role (operational responsibility) was provided by the online programming team. University C also listed outside vendors in their group of stakeholders, with the responsibility of creating select program content and providing feedback on program design.

Research question 2.2: What tools were used to build the online community of learning?

Strand (2009) talks in great detail about the importance of creating an online community of learning within any distance learning initiative. As such, it was deemed a critical piece of the process within this research context.

As summarized in Table 4.7, each university has gone about creating a learning community, but each in a different way. In two of the universities, participant engagement is seen as the key element for creating the online community of learning. In University B, the key element is deep communication. It is interesting that in the university that is using an outside vendor as their partner, communication is seen as the most important factor in creating the online community of learning, while at the two universities who use mostly internal resources, engagement is key.

In the two university cases where participant engagement is key, that engagement is accomplished in different ways, but there are three common tools used. The first common tool is having an active program manager or customer service focus. The second is having an active discussion board culture. The third and final common tool is having active faculty members or faculty facilitation of the courses within the online executive education programs.

In the case of University B, where communication is seen as the key element in creating an active community of learning, live chats and collaborative exercises are the tools used.

Research question 2.3: What was the program design process from beginning to the time the program was delivered?

While little research was found in the literature review that described the process necessary for sound online executive education program development, Branon, Beatty, and Wilson (2001) do discuss the importance of usability testing and sound program design. Additionally, White and Gerrett (2010) talk of the importance of having a systematic development process that involves the faculty early in producing interactive programming.

In the three cases that were studied, a different process was followed in each case, but similarities were evident. In all three cases, the development of the online executive education program portfolio was a two-phase process consisting of a research phase and a design phase. In all cases, within the research phase were steps aimed at exploring the market need, either through benchmarking of others in the industry or questioning of clients, and steps aimed at determining the internal university capacity available to produce the online executive education portfolio. After internal capacity is reviewed, the university can then build the best development plan to fit within their departments. In each case, a different model was chosen to develop the programming, from keeping the development completely internal, to partnering with a for-profit entity like the Bisk Educational University Alliance Group to provide all but the content, to using a middle-of-the-spectrum strategy of mostly internal resources but choosing to outsource some aspects to strategically selected external partners when necessary. It should be noted that each of these online executive education departments were created with very little seed money, so it can be assumed that this sort of venture can be started with a low monetary budget by dedicated individuals who have the key stakeholder support needed.

During the program design phase, faculty were engaged early in all three cases. As stated in the literature review, this has been shown to be an important step in the creation of an online executive education program portfolio. Additionally, in the two universities who created their online executive education program portfolios internally, testing was a step in the program design process.

Recommendations

Study findings have important implications for future researchers and executive education practitioners alike. In this section, specific recommendations for each of these groups are discussed.

For future researchers.

The first major contribution of this study is that it presents insight into the development process used by three universities in the United States when developing online executive education program portfolios. As this is a new phenomenon in the executive education industry, it should be seen as a first look that can be deepened with additional research. In this study, three different models for development are presented, self-created (using only internal university resources), partnership (partnering with an external online education company), and blended (using internal university resources supplemented with external contract partners when appropriate). These models can be further studied and expanded upon, especially as more university executive education departments come to the market.

As part of this research, a very preliminary list of technologies and tools that are currently employed at the studied universities has been constructed. As additional research is completed in this area, this list will be expanded and refined, potentially

pulling together a list of preferred or recommended technologies for delivering online executive education.

Additionally in this research, a list of stakeholders were identified as necessary parts of the development process. Additional research can be completed to further develop this list or quantitative research can be completed to determine who in the online executive education market is using said stakeholders when developing their online executive education program portfolios.

Lastly, since the literature shows that online executive education is a viable and needed market, this research lays the groundwork for additional, necessary research to be completed as new university providers enter the market.

For practitioners.

This research would be most valuable to those in the university executive education market who wish to expand their program portfolios to include online options. This research has shown three models that have worked in successful business schools in the United States, and could potentially be duplicated in other universities. Additionally, this research provides a template for practitioners to build their own strategic plan for expansion into the online market. Lastly, this research shows that the online executive education market can be reached successfully using resources available to any university with a small budget and sufficient determination. As such, this research can be used to start the conversation in additional universities throughout the United States and potentially the world for creating such a portfolio.

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Appendix A Case Study Protocol

The following protocol was adapted from Yin, 2003, p. 69.

- I. Overview of the case study project
 - a. The purpose of this study is to investigate the process used by three university Executive Education Departments in the United States to develop online executive education program portfolios.
- II. Field procedures
 - a. Call potential participant from each university:
 - b. Self-introduction / presentation of credentials, explain the purpose and goals of the study, discuss research questions, and advise as to why the participant has been invited to join the study
 - c. During the recruitment process, the researcher will identify herself as a Penn State researcher, and will inform the participants that the study is being conducted for research purposes
 - d. Explain human subjects requirement and attain necessary consent, in writing
 - e. Begin interview, using appropriate interview guide
 - f. Answer any questions that may arise from participant during interview
 - g. Thank participant for his / her participation in the research
 - h. Ask for permission for future follow-up if necessary
- III. Case study questions
 - a. For full interview guide, see Appendix B
 - b. What should be answered at from each interview regarding each research question:
 - i. Research Question 1: How is technology being used in online executive education programs?
 1. Are commercial or proprietary technologies being used
 2. What technology brands, if commercial, are being used
 3. Why were these technologies chosen
 4. What are the important features of the technologies
 5. Is the learning synchronous or asynchronous
 - ii. Research Question 2: How was the online, non-credit program portfolio developed?
 1. What stake holders were involved
 2. What roles did the involved stakeholders play
 3. Is an online community of learning created, if so, what tools were used to do so
 4. Why were the tools important in creating the online community of learning
 5. The full development process, beginning to end

- IV. Guide for the case study report
 - a. Context
 - i. Background
 - ii. Description of current online executive education program portfolio
 - b. With-in case analysis
 - i. Description of interview subjects and documents used
 - ii. Description of current technology strategy used in online executive education
 - iii. Description of how the online executive education programing was developed
 - c. Cross-case analysis
 - i. Summarize, using tables, themes from each of the three cases

Appendix B Interview Guide

<p>Opening Script: Thank you for agreeing to participate in my study on using online methods for delivering executive education programs. My name is Angela Stopper, and you can reach me at alm251@psu.edu or 814-360-8178 at any time after this discussion if you have questions or would like to add anything to your responses. Again, this research is for a dissertation titled “Success factors in launching online executive development programs in three universities: A collective case study.” I am going to ask you a number of questions and ask that you respond honestly. The interview should take about 40 minutes.</p>	
Name of University:	
Interviewee Contact Information:	
Name Title Email Address Phone Number	
Interview Information:	
Date Time Venue	
Questions	Answers / Notes
1	What non-credit programs do you currently offer in an online format?
2	How did you determine which of your programs to offer in an online format?
3	Please describe for me the thought process that lead to your university developing an online executive education program portfolio?
4	Please describe for me, step by step, the process that you followed when developing and launching your online executive education portfolio? (Research. Testing.)
5	Please describe for me the team involved in the development process? (Title. Department.)
6	How were these stakeholders involved in the process? (When they were brought in. What feedback did they give.)
7	Please describe the technology that you use in your online executive education programs?
8	How did you determine what technology to use in the programs?

9	What steps have you taken to ensure that participants feel that they are part of a true learning community while participating in your online, non-credit programs?	
10	What specific technologies or tools do you use to build the online community of learning?	
Field Observations:		
Follow-up Issues:		
<p>Closing Script: That concludes my prepared questions. Do you have any additional comments you would like to add or any questions for me?</p> <p>Thank you for your time and cooperation.</p>		

Vita Angela L.M. Stopper

Angela L.M. Stopper is currently a Ph.D. candidate at the Workforce Education and Development Program, College of Education, the Pennsylvania State University, University Park campus. Her research interests include organization development, change management, executive education, and leadership development.

Angela is currently employed as the Global Portfolio Strategist and Director of the Business Program Portfolio for the Penn State World Campus and Academic Outreach. In this position, she is responsible for the establishment, implementation, and monitoring of a plan designed to cultivate global client accounts and university partnership agreements for the delivery of adult learning opportunities on the global market. Additionally, Angela is responsible for the revitalization of the business portfolio, containing both distance and face-to-face courses designed specifically to serve the learning needs of the adult learner market in the area of business education. Through research aimed at analyzing the global market and current competition, Angela works collaboratively with the senior leadership and operations teams to build a business portfolio of new and modified programs to meet market demand.

Before her work with the Penn State World Campus, Angela spent 12 years working with Penn State Executive Programs as their Assistant Director of Operations, gaining operations management experience in the area of executive education including logistical planning, program development, faculty selection and management, program delivery supervision, and post-program evaluation.

Angela's past research projects include needs assessment work looking at past participant experiences in general management training at Penn State Executive Programs and the need for additional development activities, workshop development, consulting projects focusing on executive coaching, and research papers in the areas of learning preferences of a generationally diverse workforce.

Angela holds a Bachelor of Science in Marketing and International Business and a Master of Science in Workforce Education and Development, with a concentration in Human Resources and Organization Development, both from The Pennsylvania State University.