Catalyzing Independent School 21st Century Conversations

Boston **London** **Los Angeles**

OESIS Learning Innovation Report on U.S. Independent Schools 2014–2015

By Sanje Ratnavale
President
OESIS Group

www.oesisgroup.com

Contents

Acknowledgements

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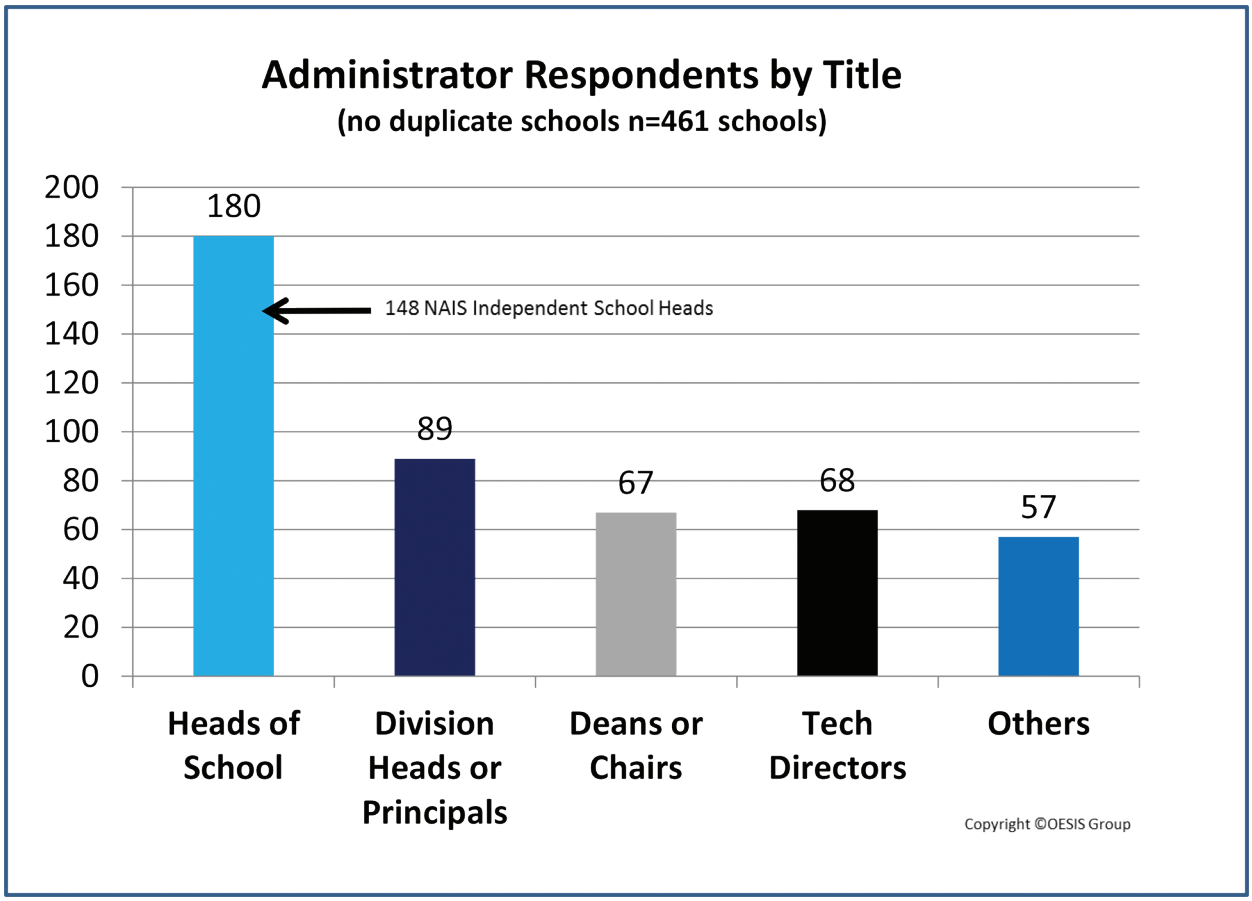
Introduction

After two years serving the independent school sector through our conferences, which were attended by over 350 independent schools and 1,150 educators participating in 200 sessions, we felt it was time to paint a picture of the independent school landscape in regard to technology-enabled learning, which we could share with the wider world.



Under the program, *OESIS Blended Learning and Education Technology Survey 2014*, we recently conducted two surveys—one for schools, with **461 participants** through senior administrator responses, and another for **teachers, with 523** random, non-school specific respondents.

Introduction

These surveys helped us to answer the following overarching questions:

1. **How mainstream is the conversation about technology-enabled learning models such as Blended Learning?**

2. **Are there any institutional drivers emanating from the independent school sector?**

3. **What are the key motivational drivers for Blended Education in U.S. independent schools?**

4. **What are the forces that represent barriers to Blended Learning adoption?**

5. **What can we learn from the schools who were the early adopters?**

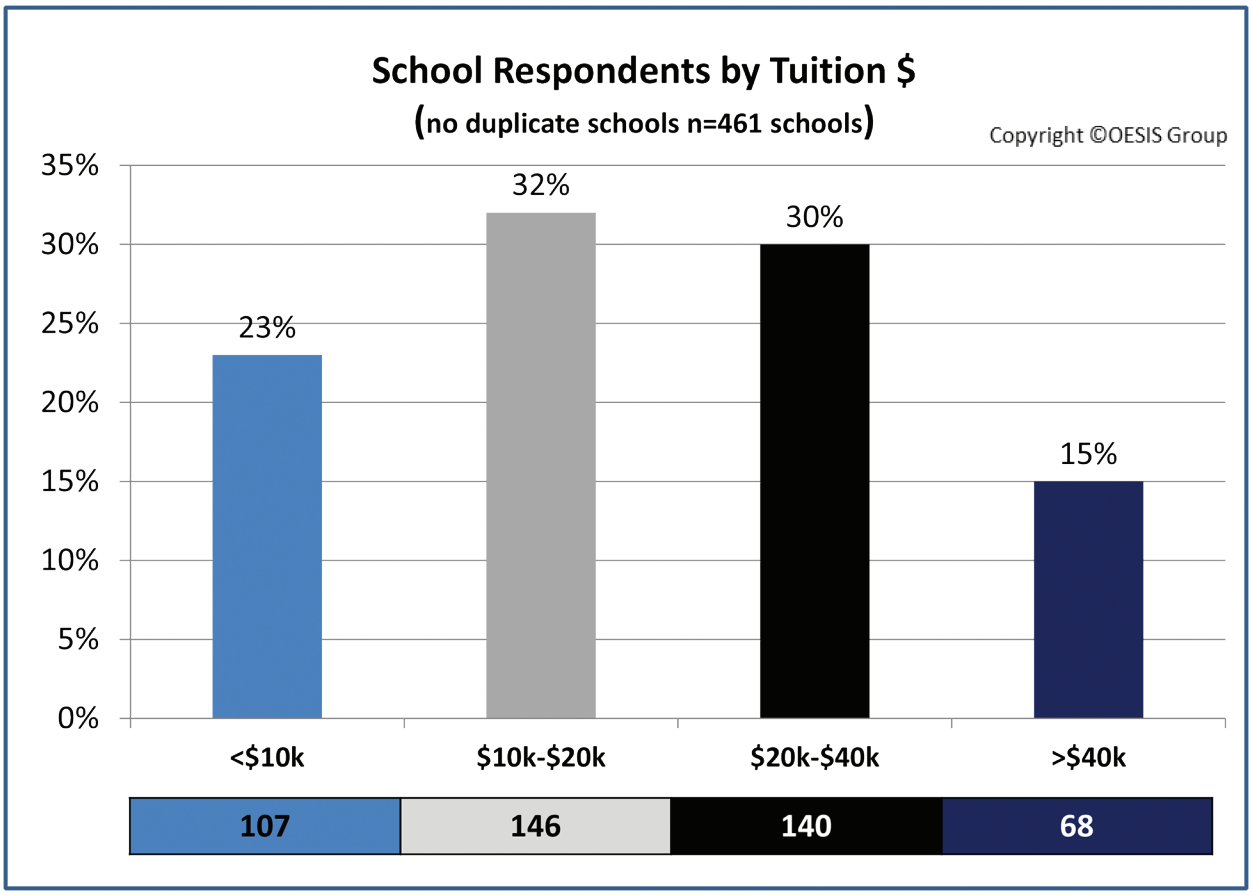
6. **Can we see trends identified by schools in the attitudes of constituencies such as academic departments, students and parents towards Blended Learning?**

7. **What kind of adoption is already apparent in broad categories of technology?**

8. **What kinds of online channels are being utilized for professional development?**

Introduction

As a coda to this introduction, we draw your attention to the significance of our sample sizes. Both samples are large enough and diverse enough to provide meaningful insights into what is happening. This is the first time that a survey for schools has received such a significant response in the independent school world in the area of technology-enabled learning. Within the 461 total schools participating, there were 342 schools that belong to a regional or national independent school association. These 342 independent schools alone embody over 24% of the total population of U.S. schools represented by the largest national association of independent schools. The school sample, as shown in the chart below, also represents a broad cross section of schools with respect to their tuition costs.



Introduction

We also note that for the *OESIS Blended Learning and Education Technology Survey 2014,* we used the definition of "**Blended Learning**" from the Christensen Institute:

> "… as a formal education program in which a student learns at least in part through online learning, with some element of student control over time, place, path, and/or pace; at least in part in a supervised brick-and-mortar location away from home; and the modalities along each student's learning path within a course or subject are connected to provide an integrated learning experience."

There are many different models of Blended Learning with the principal models being the following:

- **Rotational Models** where students rotate teaching stations;
- the **Flipped Classroom** where a significant portion of traditional lecture-style direct instruction is transferred to homework and online activities to enable more teacher intervention time in class; and
- the **Flex Model** where large groups of students primarily learn online at a school site, with pullouts where necessary if competency is not achieved, or when mastery affords enrichment.

Executive Summary

Each of the main questions that we seek to answer below starts with a summary conclusion. Overall we see the independent school market starting to approach a tipping point regarding the use of technology to improve learning opportunities.

- Close to 20% of independent schools in the U.S. are in advanced stages of Blended Learning adoption, with 12% having 75% of their teachers blending classes and 6% having more than 50% blending classes. As a whole, 41% of schools report that they are implementing Blended Learning and 51% report that they are exploring it.

- The two most significant benefits of Blended Learning reported by schools are "**accessing better content** beyond standard textbook sources" and "creating **time to personalize** student instruction." The benefit of better content was considered (a lot or a fair amount) by 77% of schools responding and 80% of teachers responding. The benefit of time for personalization was considered (a lot or a fair amount) by 65% of schools responding and 67% of teachers responding. These two benefits are hallmarks of the Flipped Classroom approach to Blended Learning, which stress creating more quality teaching time. Given the emphasis on low student-teacher ratios, and close instruction historically in independent schools, this seems to be a natural trend. The goal of personalization therefore seems to be applying more to teaching opportunities than to learning opportunities.

- A striking observation is the fact that schools consider Blended Learning less as an opportunity for "enabling more **formative assessments,**" or "getting **more data** for intervention." The benefit of formative assessment enablement was considered (a lot or a fair amount) by only 49% of schools responding and 59% of teachers responding. The benefit of better data for intervention was considered (a lot or a fair amount) by only 33% of schools responding and 48% of teachers responding. A significant data culture that values formative assessments highly are hallmarks of more advanced models of Blended Learning that are often found in leading public school models. These models stress student agency, the self-pacing of elements of student learning and maximize scheduling flexibility. Whether this is rooted in the general antipathy of independent schools to close scrutiny of data, or is driven by other instructional preferences, or by lack of training or technology assets, it is an important observation and one deserving of closer examination.

- Another key conclusion from the survey of the landscape is the attractiveness for schools and teachers of using Blended Learning for higher order elements of the learning universe; to be more specific, for using it to target creativity, synthesis, evaluation and critical thinking through **Project-Based Learning** and **student collaboration**. The two most significant benefits reported by schools and teachers, after better content and more personalization opportunities, are "enabling Project-based Learning" and "encouraging student collaboration." The benefit of enabling Project-based Learning was considered (a lot or a fair amount) by 65% of schools responding and 68% of teachers responding. The benefit of encouraging student collaboration was considered (a lot or a fair amount) by 58% of schools responding and 66% of teachers responding.

It seems apparent from both the OESIS conference evidence and the Blended Learning Survey that independent schools are following an approach that amplifies their strength of close instruction through the Flipped Classroom, and caters to their focus on higher order college prep learning goals of creativity, analysis, and critical thinking through pathways like Project-based Learning. Advanced Blended Learning models (defined above such as Flex and Rotation) which are gaining traction in public schools, do not seem to have significant buy-in yet in the independent school world. These models are more focused on data-driven intervention, student agency for pacing and direction, and feature significant online programmatic elements based around competency.

Differences

A discussion of independent school innovation requires some perspective on the public school world, which has led the K-12 world on innovation in learning in the U.S. The central 21st century education goal of personalizing learning and moving outside of "factory-based models"[1] still revolves around how any such new models of learning, whether online or blended, can scale for large groups of students. This imperative of scalability in public schools is compounded in complexity by other key drivers that are less pressing in our sector. For example, public schools need to cater to a very diverse and heterogeneous population, particularly as far as ability and preparedness are concerned, and they must cope with very limited funding per student.

It is no surprise therefore, albeit ironic, that the move toward greater personalization of learning in the public school sector is being built on top of standardization through the curricular framework called the Common Core and associated assessments, the hope being that with standardization comes a platform that can provide instructional personalization that is scalable. How does this work in theory? Content and skills, in particular, can be compartmentalized into Common Core "competencies" that can be assessed in scale and provide intervention thresholds. Student failure leads to personalization in the form of teaching remediation once identified as required. Student mastery leads to more student agency-driven opportunities for enrichment into higher level areas such as critical thinking, creative exercises, and projects managed by a teacher. This approach to personalization is akin to an approach to tailoring that defines canonical sizes of clothes and then works to find the appropriate size for each customer, abandoning the notion that the tailor might be expected to make clothing to measure. Building on this analogy, it is clear that the independent schools still believe that bespoke education is possible and that their teachers have the necessary skills to deliver.

1 Used by Michael Horn and Clayton Christensen in their book *Disrupting Class*

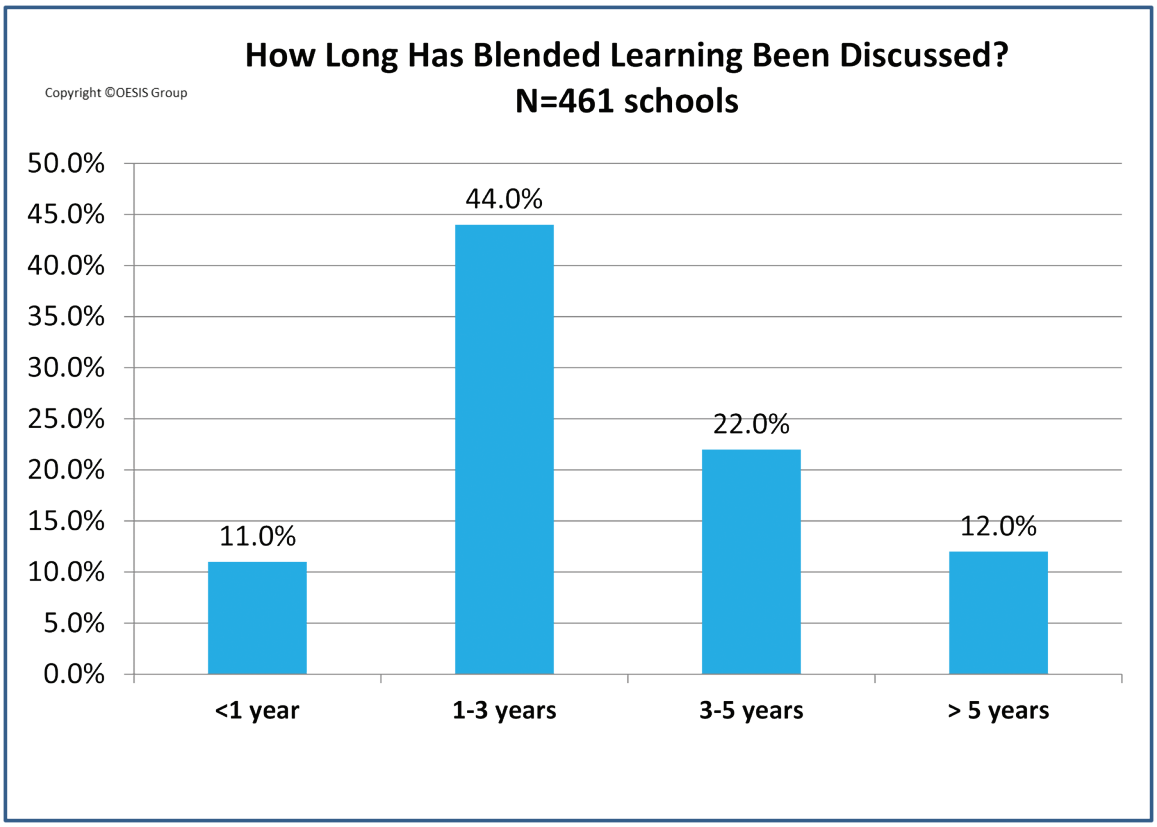
Differences

One thing was clear as we embarked on this endeavor. It is important to recognize the possible differences in innovation trajectories and interests from the public school world and also within the independent school world. Here are some key independent school differentiators:

- Independent schools have no standard curriculum, although college preparedness requires commonality in certain areas. Independent schools generally focus on a more advanced academic set of offerings expected than the "career and college readiness" yardsticks across the very diverse public school world.
- Although academic scaffolding, remediation and credit recovery pervade all segments of education, independent schools generally gravitate to populations that are more selective academically. Competencies represent in the independent school world a low bar that must soon be breached into high order critical thinking and creative learning paradigms.
- Independent schools place a high touch instructional environment as key to their success and their attractiveness for their clients, characterized to date by the concept of small class sizes.
- Teachers tend to gravitate toward independent schools because a much higher degree of independence is afforded to them in curriculum and instructional design and practice.
- The cost per student of independent schools at the low end equates with public schools ($10-$12k), but at the high end can be five times the price.

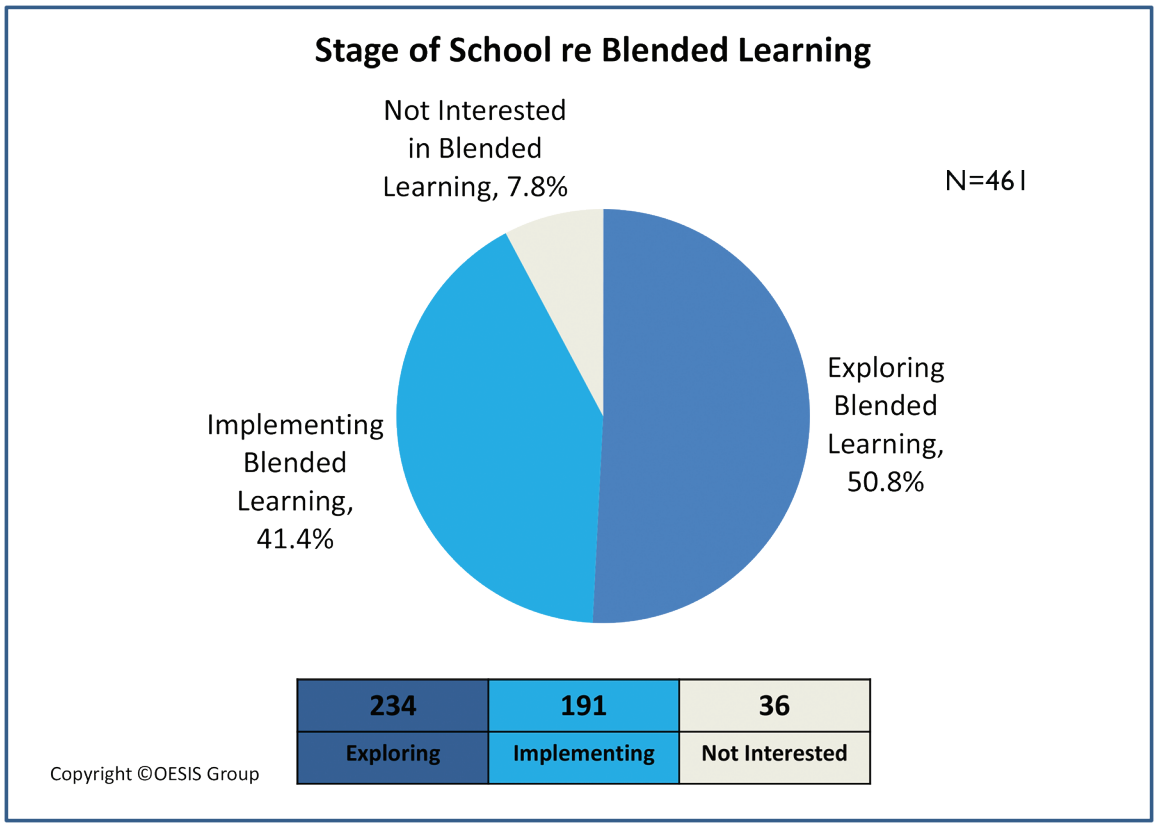
1. How mainstream is the conversation about technology-enabled learning models such as Blended Learning?

Conclusion. With 41% of independent schools implementing some form of Blended Learning, and 51% exploring it, the opportunities and conversations over the last five years have moved squarely into the mainstream. An advanced group of 18.2% of schools has made a true and early commitment to Blended Learning of which 12% actually have more than 75% of their teachers blending their classes.



The majority of schools have joined the conversation only in the last three years and the results remain statistically the same at tuition levels both above and below $20,000. Our experience at OESIS, albeit representing a smaller sample of the independent school world weighted towards NAIS and TABS schools, confirms this picture. Early adopters that are blazing a trail come from both ends of the tuition scale. They also appear to come from boarding schools as much as day schools.

The technology conversation in independent schools has changed over the last five years. The focus on smart boards and technology assets such as laptops no longer represents anything close to innovation in schools. The smart board represented an easily acceptable level of buy-in to technology as it essentially reinforced the position of the teacher at the front of the class delivering learning in much the same way as before. The move toward truly new learning models including online learning and Blended Learning has only come into the forefront in the last five years.



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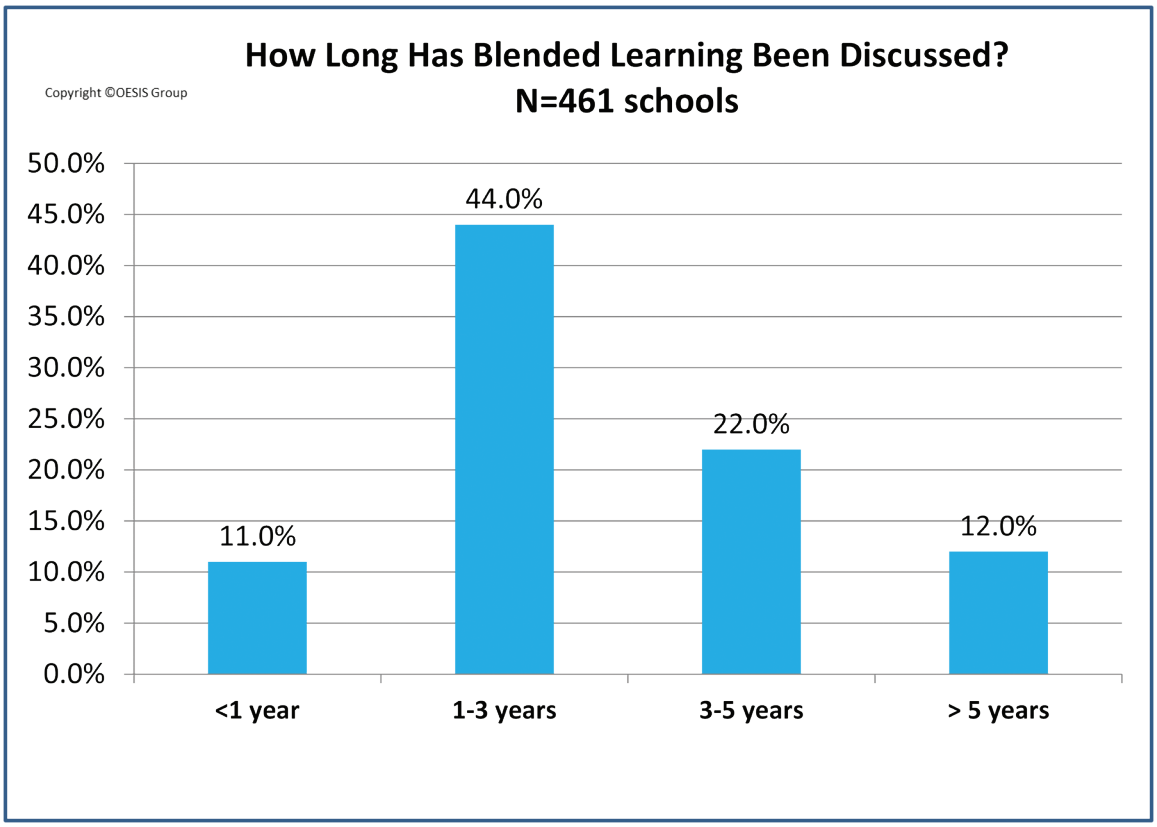

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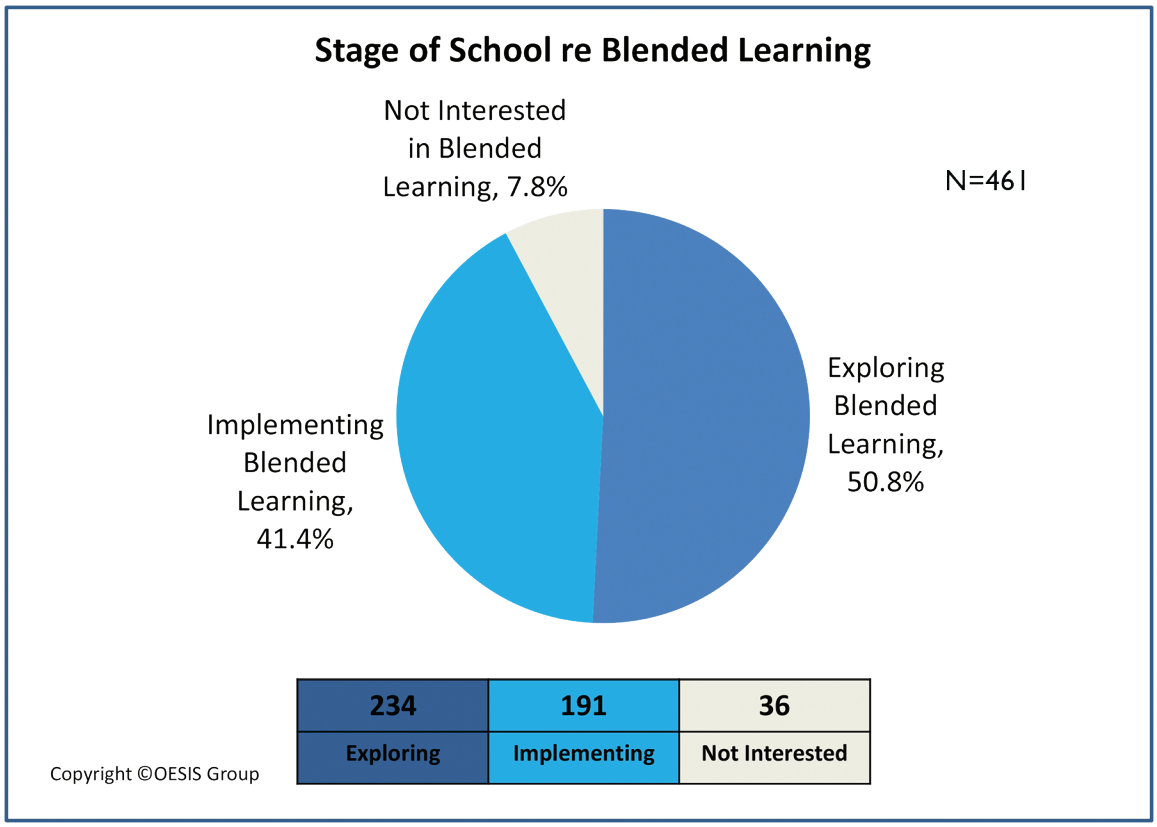


2.2 New Independent School Consortia

Conclusion. Over the past two to three years, a number of new independent school organizations have appeared on the scene, providing another level of innovation scaffolding to the sector, and more are set to appear regionally and nationally as in the public school world.

- The first and largest new consortium and one with international ambitions is the **Hybrid Learning Consortium.** Headquartered out of the Midwest, it has developed both synchronous and asynchronous models of online learning by partnering with secondary schools. It was founded and is spearheaded by the Barstow School (MO).
- The second largest consortium is the **Malone Schools Online Network**, which is comprised of 15 schools that have received large endowment gifts in the past from the Malone Family Foundation together with the Stanford Online High School, which was also funded by the Malone Family Foundation. This national consortium is focused on the seminar-based "synchronous" model of online and Blended Learning pioneered by Stanford Online High School.
- On the West Coast, the **Bay Area Blend-Ed Consortium** offers courses from a group of schools including Urban School of San Francisco, College Prep, Marin Academy, Lick Wilmerding and the Athenian School.
- The well-known **8 Schools' Association** of elite New England private schools has also begun offering courses together to its constituent schools in New England.
- Associations too are beginning to set up consortia efforts such as **VizNet** in the Southeast and **MSAISnet** in the mid-South.

3. What are the key motivational drivers for Blended Education in U.S. independent schools?

3.1 Personalizing Learning and/or Creating Instructional Space

Conclusion. At this stage in the innovation cycle, it is our conclusion that independent schools are primarily leaning toward opportunities for personalization by blending their classes. This is being done not so much to give students control over the elements of their course in terms of time and pace, but more so around the time they can recover for extra instruction in the classroom known as the Flipped Classroom model. Blended Learning is therefore not coming from the primary goal of enhancing student agency per se, but from the goal of reinforcing the quality offered by independent schools of more close instruction. This is a classic case of technology being used to amplify existing strengths. Some of the other learning models for personalization like the Flex Model and Rotational Models that have taken hold in public school blending environments marry student agency or pacing with an emphasis on learning data. We can see from the responses to questions on the data we posed, that this is clearly not the independent school context at this time.

Survey Question: **What benefits of Blended Learning do you feel resonate (a) most with faculty at your school (b) with you as a teacher?**

Creating time to personalize student instruction	Schools	Teachers
	N=461	N=523
A Lot	28%	**32%**
A Fair Amount	**37%**	**35%**
A Little	29%	29%
Not At All	6%	4%

The important question that arises from the identified desire to personalize learning is how this can be accomplished. With the Flipped Classroom, it is through more quality time to intervene with students. Much of this is done by the same homework problems or assignments being done in class now rather than at home. Personalization is therefore based on the same assessment rubric, albeit done in a place where intervention is more dynamically available.

Blended Learning models do exist that go beyond this switch employed in Flipped Classrooms. They entail deploying more formative assessments and using data coming out of student work to construct adaptive pathways for teachers to personalize the learning journey. The Flex Model, for example, relies on the student pacing themselves through units of competency for a particular content standard or skill in an online curriculum. Through the learning management system, the teacher can see how the student is performing in real-time, where he/she has gotten stuck or where he/she has flown through the tasks. This data then gives the teacher vital information to personalize a student's path. Returning to our tailor model, this is like having an alarm sound from the fitting room when one of the standard sizes isn't quite fitting right. The responses profiled in the next two tables will be of no surprise to most independent school practitioners who are aware that a learning data culture does not pervade the independent school world. The survey data indicates little buy-in for utilizing Blended Learning at this point for enabling more formative assessments and even less support for using data for intervention.

It is too early to conclude beyond what independent school practitioners and associations know about the lack of a data culture on why these responses exist. Two further areas that might shed light below on this issue are the conclusions we come to under Question 4: Barriers to Blended Learning Adoption (around time for course redesign and professional development) and Question 7 on Technology Use (around formal learning environments).

Survey Question: **What benefits of Blended Learning do you feel resonate (a) most with faculty at your school (b) with you as a teacher?**

Enabling more formative assessments	Schools	Teachers
	N=461	N=523
A Lot	12%	22%
A Fair Amount	**37%**	**37%**
A Little	**38%**	**30%**
Not At All	13%	11%

The use of data-driven instructional approaches have for a long time been anathema to independent schools for the following reasons: data is too closely associated with standardized testing, data represents treating students as numbers, and data represents a sense of accountability that compromises faculty independence.

Survey Question: What benefits of Blended Learning do you feel resonate (a) most with faculty at your school (b) with you as a teacher?

Getting more data for intervention	Schools	Teachers
	N=461	N=523
A Lot	8%	18%
A Fair Amount	25%	**30%**
A Little	**47%**	**38%**
Not At All	20%	14%

If Blended Learning is not being introduced for the purpose of allowing for more formative assessments, or to garner using more data coming out of the transformed experience, then blending is likely being used in a Flipped Classroom model to allow access to better content and to create more intervention time using the same assessments and data. The chart below on the benefit of accessing better content, which showed the strongest benefit profile in terms of responses, reinforces that conclusion. Schools and teachers believe that good external content can replicate a part of the instruction they provide and create time for other harder to deliver areas of teaching.

Survey Question: What benefits of Blended Learning do you feel resonate (a) most with faculty at your school (b) with you as a teacher?

Accessing better content beyond standard textbook sources	Schools	Teachers
	N=461	N=523
A Lot	**36%**	**43%**
A Fair Amount	**41%**	**37%**
A Little	19%	15%
Not At All	4%	5%

3.2 Project Based Learning & Student Collaboration

Conclusion. The opportunities for higher order thinking and deeper engagement through student collaboration and hands-on project activities is seen as the next most popular set of benefits that could be achieved by Blended Learning in the independent school world.

It is too early to speculate with complete confidence why this would be one of the areas of greatest perceived benefit; however, two reasons do spring to mind from what we are hearing also at OESIS.

First, when combining Blended Learning with Project-Based Learning ("PBL") or Design Thinking, the extra time created by blending affords teachers an opportunity to remedy a historical issue with PBL; namely, this extra time provides teachers with pathways to address the need for preserving course content breadth for these classes that are compromised by the consumption needs of the projects.

Second, higher order thinking corresponds closely with the college-prep focus of most independent schools. In such a context, it is interesting to see the responses to the two benefits offered of Blended Learning as **"enabling Project-Based Learning"** and **"enabling student collaboration."** They represent the most popular responses to benefits after *"accessing better content."*

Survey Question: **What benefits of Blended Learning do you feel resonate**
(a) most with faculty at your school
(b) with you as a teacher?

Enabling Project-Based Learning	Schools	Teachers
	N=461	N=523
A Lot	17%	29%
A Fair Amount	**48%**	**39%**
A Little	**30%**	26%
Not At All	5%	6%

Evidence of collaborative student-centered learning can be found in many areas of the independent school world. A few examples that can be cited include the "maker movement," the creation of 21st century spaces around the country, the adoption of Design Thinking pedagogy in many classes, the significant use of Google docs, wikis and blogs, and the integration of internal social networks.

Encouraging student collaboration	Schools	Teachers
	N=461	N=523
A Lot	13%	**37%**
A Fair Amount	**45%**	**39%**
A Little	**31%**	20%
Not At All	11%	4%

3.3 Course Choice and Scheduling

Conclusion. From an administrator's perspective, it is clear that using Blended Learning to offer course choice that would otherwise not be possible due to insufficient student demand or teacher availability, is a key driver.

Close to 70% of schools responding considered the ability to offer courses otherwise difficult to justify as a fair or significant benefit of Blended Learning.

The ability to offer courses and options otherwise difficult to justify	Schools
	N=461
A Lot	**35%**
A Fair Amount	**35%**
A Little	20%
Not At All	9%

The existence of a number of consortia in the independent school world from the Bay Area Blend-Ed Consortium, the Virtual High School, the Global Online Academy and the Online School for Girls to name a few, reinforces the importance of this opportunity to expand programmatic offerings at independent schools. Many courses offered are supplemental courses through such endeavors, although the OESIS L.A. Classes of the Future symposium with its many core academic blended and online classes show a sector moving into the mainstream.

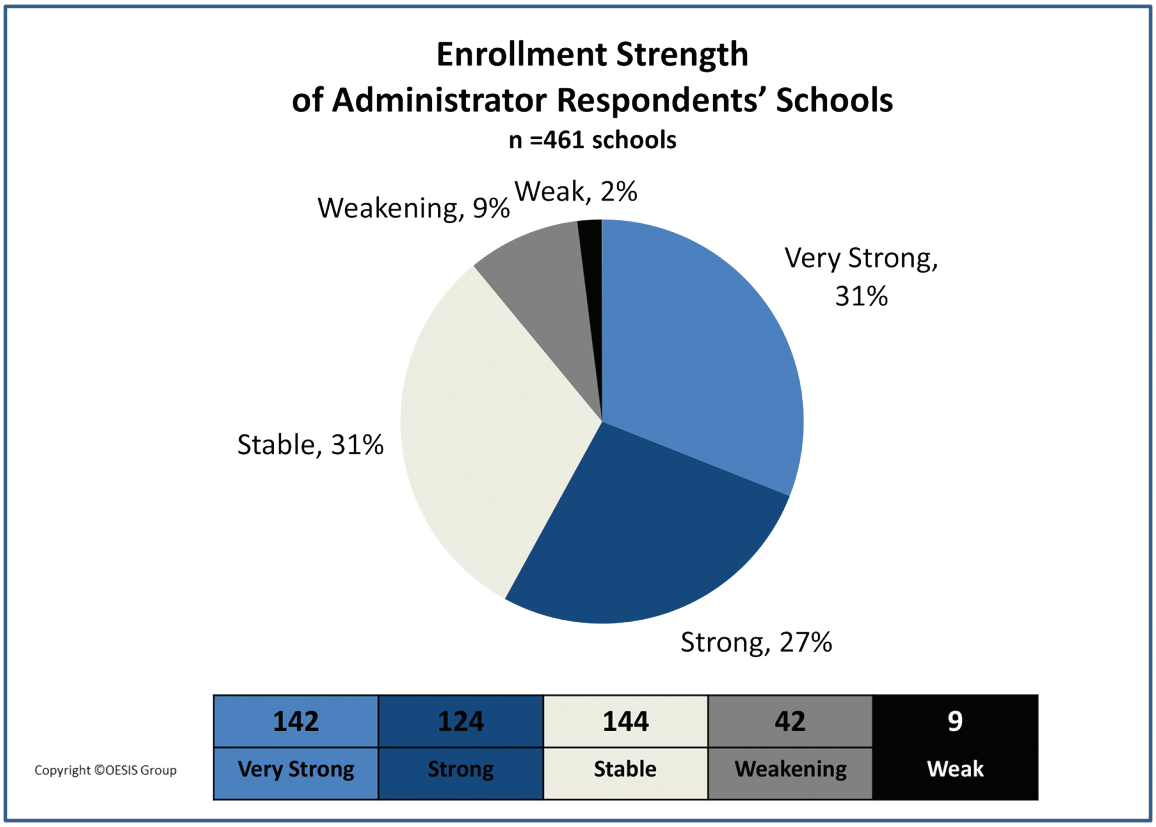
A few schools such as Shattuck-St Mary's in Minnesota have embraced the scheduling opportunity in an expansive way. Begun in 2010, their program has now grown to the point where 95% of Juniors and Seniors have at least one blended class, and 30% of Juniors and Seniors have four or more classes in this model. Schools such as Orange Lutheran in California have taken the scheduling opportunity to an even more strategic level to accommodate their admissions wait lists by offering different kinds of tuition options such as an on-campus tuition, a fully online tuition, and a blended tuition with some classes on campus. The school has been offering this choice for close to six years. Orange Lutheran had 827 blended student class enrollments last year. Another California independent school, Oaks Christian, has an online school extension to its on-campus program with over 500 of the on-campus students taking online courses. Although WASC, UC and NCAA approved, it too is seeking accreditation with an independent school commission outside of its region.

3.4 Fear or Opportunity

Conclusion. We conclude that innovation is coming from a place of current strength and learning opportunity. Schools are being very deliberate and cautious about exploring this area. Fear, when considered as dictating a necessary and pressing imperative, such as loss of competitiveness, does **not** enter the equation at this point; however, there is a sense that a lost opportunity in the longer term should be investigated now.

One might be tempted to think that educational change in the independent school sector can be influenced by policy to the same degree it is in other spheres like the public school world. The frustrating experience of leading associations in the U.S. to require a culture and mindset of "data use" in their constituency schools over the last decade is an indicator of how limited that power really is. There is really no stronger force on independent school change than the market itself. When the market demands it, schools that are slow to react suffer in enrollment and giving. We asked a question about enrollment strength so we could compare the various responses with other questions to see if any trends emerged. The first thing to note was that enrollment appears to be strong across the board.

Interestingly as an aside, enrollment responses at 91 western schools were even stronger than at 166 New England schools.



With 41% of schools implementing Blended Learning and another 51% exploring it, there were no differences by enrollment strength. Over 56% of administrator respondents considered a fair/significant benefit of adopting Blended Learning so that they would not be left behind their peer schools, but again there was no difference among schools with weak or stable enrollments compared to the schools with strong or very strong enrollments.

Survey Question: **What benefits of Blended Learning do you feel resonate most WITH ADMINISTRATION at your school?**

Not wanting to be left behind	All Schools	Schools with Stable or Weak Enrollment
	N=461	N=195
A Lot	22%	22%
A Fair Amount	**34%**	**37%**
A Little	29%	**30%**
Not At All	15%	11%

4. What are the forces that represent barriers to Blended Learning adoption?

Conclusion. From a faculty perspective, schools and teachers agree that creating time for teachers to transform courses during a busy school year is the number one barrier with 65% of school respondents and 66% of teachers considering it a fair or significant barrier. Sufficient time or money for teachers would provide the necessary incentives for them to transform their courses from digital pastiches of their original classes to coherent, integrated and adaptable sequences of digital learning. The other significant obstacle identified at least by school administrators is a lack of professional development funds allocated in the budget.

With many competing demands on school budgets, the expenses of a pedagogical and curricular redesign of this nature is no small undertaking. It is clear that some schools simply cannot afford such a commitment within an operating budget, or are merely hoping that change will take place incrementally over time. Many of the schools leading adoption have paid teachers to transform their courses with a stipend of some kind. Where there is a resistance to providing financial or reduced time support for the development of Blended Learning courses or the redesign of existing courses, we are told that teachers see this as a lack of support for the model by the administration.

Having insufficient time to transform courses	**All Schools**	**Teachers**
	N=461	N=482
A Lot	24%	**34%**
A Fair Amount	**41%**	**32%**
A Little	27%	24%
Not At All	8%	10%

Blended Learning in its various forms often represents a significant pedagogical departure, so professional development internally and externally becomes paramount. New avenues of professional development have emerged over the last five years. In particular, many consortia including the Virtual High School, Global Online Academy, the Hybrid Learning Consortium and the Online School for Girls offer professional development online and in person. The OESIS symposia also offer something new and different: cross-fertilization of innovation on a national scale, but in a close setting of 250-300 people per event, where schools can bring teams of educators to collaborate in formats not easily replicated in gatherings multiple times the size.

Insufficient professional development funds available	All Schools	Teachers
	N=461	N=482
A Lot	16%	17%
A Fair Amount	**37%**	24%
A Little	**35%**	**30%**
Not At All	12%	29%

Interestingly, the need to learn new digital tools and content is not identified by respondents as a significant barrier. This provides an indicator potentially that technology use generally is paving the way for a natural acceptance of the opportunities.

Learning new digital tools and content	All Schools	Teachers
	N=461	N=482
A Lot	6%	14%
A Fair Amount	26%	**30%**
A Little	**52%**	**33%**
Not At All	16%	23%

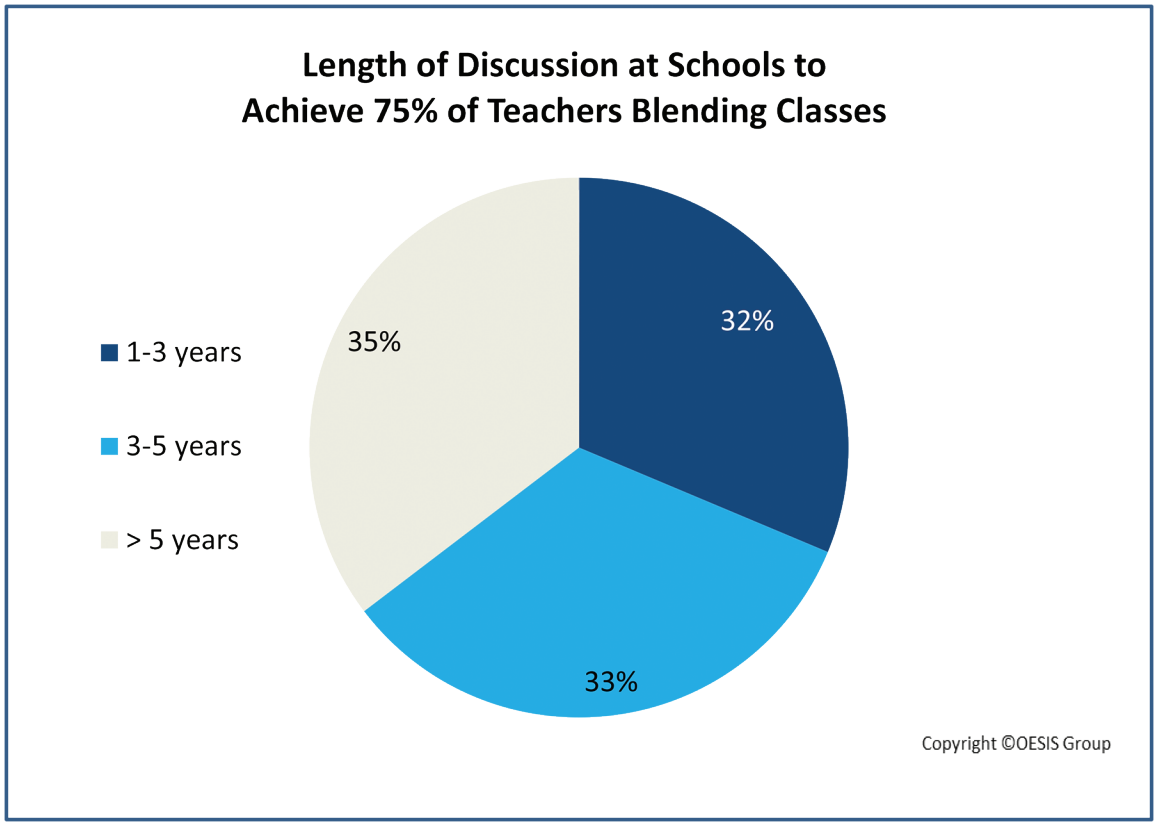
Other possible barriers presented to respondents show no real evidence of any further significant issues that need to be raised at this time.

5. What can we learn from schools who were the early adopters?

Conclusion. These conclusions are based on schools that now have more than 75% of their teachers in blended environments. As with our overall conclusions above on drivers, these schools show an even more pronounced emphasis on Project-Based Learning and student collaboration. They also indicate the same emphasis on personalization and accessing better content, but with **more** of an emphasis on data or formative assessment opportunities. The timeline of transforming classes into a blended format shows a range among these schools. This leads us to conclude that with an aggressive approach such a goal could be achieved within three years, although it seems more likely that it will take three to five years.

We looked at the 55 schools, albeit a small sample size, that have managed to get more than 75% of their teachers to blend their classes.

Benefits of Blended Learning	A lot	A Fair amount	A Little	Not at All
• Creating time for personalization	**40%**	**42%**	18%	0%
• Enabling Project-Based Learning	**31%**	**49%**	18%	2%
• Encouraging student collaboration	29%	**45%**	24%	2%
• Enabling formative assessments	24%	**45%**	29%	2%
• Getting more data for intervention	16%	**38%**	**40%**	6%



In the chart above we analyzed how long these schools had been discussing Blended Learning. The data is evenly split by the time segments and we can only conclude that speed is really a function of commitment and resources.

6. Can we see trends identified by schools in the attitudes of constituencies such as academic departments, students and parents towards Blended Learning?

Conclusion. It would appear that students are the most positive constituency according to the schools surveyed with 70% having very positive or positive attitudes in their student body toward Blended Learning. The math and science departments show strong support with 61% of math departments and 66% of science departments positive or very positive. There do not appear to be areas of significant negativity among other constituencies such as parents, trustees or other departments.

Survey Question: **What are the overall attitudes of other constituencies to Blended Learning at your school?**

n=461 Schools **Attitudes of**	**Very Positive**	**Positive**	**Neutral**	**Negative**	**Don't Know**
Students	29%	**41%**	18%	3%	9%
Trustees	20%	**36%**	20%	2%	22%
Parents	15%	**35%**	29%	5%	16%

Survey Question: **What are the overall attitudes of each department toward Blended Learning at your school?**

n=461 Schools **Attitudes of**	**Very Positive**	**Positive**	**Neutral**	**Negative**	**Don't Know**
Math	25%	**36%**	22%	6%	11%
Science	**30%**	**36%**	19%	5%	10%
English	18%	**34%**	24%	12%	12%
World Languages	24%	**32%**	22%	7%	15%
History/Social Sciences	25%	**32%**	26%	6%	11%
Performing Arts	12%	16%	**30%**	10%	**32%**
Visual Arts	17%	25%	25%	8%	25%
Athletics	4%	12%	**32%**	11%	41%

7. What kind of adoption is already apparent in broad categories of technology?

Conclusion. By categorizing technology, we tried to get a sense of whether or not informal or formal learning environments (or both) were being targeted by schools' technology initiatives. It is our conclusion that greater emphasis has been on enabling student-centered, outward-facing informal opportunities for learning such as social networking, external content capturing areas like wikis and blogs, or communication technology such as forums and Web conferencing. This has led the charge at schools to date. With only 53% of schools currently using a Learning Management System and lesser use of teacher enabling tools like Lecture Capture, it is clear that significant infrastructure spend in the sector is likely going forward as the pace of Blended Learning adoption and implementation increases.

n=461 Schools **Attitudes of**	**Currently in Use**	**Planning to use**	**Interested**	**Not Planning**	**Not Familiar**
Learning Management Systems	**53%**	13%	13%	8%	13%
Adaptive Learning Systems like Aleks and Knewton	15%	9%	21%	18%	**37%**
Student Response Systems like iClicker	**44%**	11%	19%	17%	9%
Plagiarism Detection Software like Turnitin.com	**50%**	6%	14%	23%	7%
Social Networking internal or external	**63%**	6%	10%	18%	3%
External Content Capture like blogs and wikis.	**73%**	8%	12%	5%	2%
Internal Content Capture for Lecture Capture	**37%**	11%	22%	11%	19%
Communication Technology like chat and Web/video conferencing	**63%**	14%	15%	6%	2%

8. What kinds of ONLINE channels are being utilized for professional development?

Conclusion. The only conclusion that can really be drawn from these responses is that there seems to be limited buy-in to using online channels for professional development and actual outright hostility toward using Twitter.

This was not a required question and garnered 80% of the 523 teachers that responded to the other questions. Webinars achieved some level of popularity as a channel, probably because of the face-to-face element. Twitter is not that much of a surprise as similar lack of buy-in characterizes the public school world at large; we hear the common complaints of a lack of authentic disagreement and a chat environment on Twitter that is simply too frenzied or limited in word space.

Survey Question: Which of the following online channels do you use or plan to use for your own professional development?

n=418 Teachers **Attitudes of Teachers**	**A lot**	**A Fair Amount**	**A little**	**Plan to explore**	**Never**
Twitter	10%	10%	20%	12%	**48%**
Subscriptions to online journals	17%	25%	28%	15%	15%
Public Social Professional Networks like Google+	21%	23%	28%	9%	19%
Members only Professional Networks like association list serves.	17%	21%	28%	12%	22%
Webinars	13%	26%	**38%**	12%	11%
A credit carrying online course	12%	16%	18%	25%	29%

Looking Ahead

With the input of our Classes of the Future teachers at OESIS Los Angeles we plan to do this survey every year and expand on some of the elements that are emerging in the independent school world, but also in the wider landscape of educational technology innovation. Here are a few themes and questions we intend to keep an eye on both in future surveys and the emphases of our conferences going forward:

- **What are the frameworks that schools are using to capture the type of learning that is taking place in informal learning environments?**
- **Are we seeing greater movement towards curriculum and assessment redesign to accommodate personalization, Project-Based Learning and new learning models?**
- **What trends are taking place in human resources management to accommodate learning innovation?**
- **What are the trends in infrastructure spending in regard to learning management systems and adaptive learning pathways and systems?**
- **Is innovation still focused on amplifying traditional strengths or in exploring non-traditional opportunities, particularly in scheduling and data use?**

If there are other areas that you consider important for us to explore, we would be glad to hear from you. Thank you for reading our report.

About the Author

Sanje Ratnavale is the President and Co-Founder of the OESIS Group that runs the various OESIS initiatives from symposia to research. He has held senior administrative positions at independent schools including Associate Head of School at a K-12 school for seven years and High School Principal for three years. Sanje has taught Latin and History at the High and Middle School levels: his educational career spans both British (Windlesham House School) and American (Marlborough School and Sierra Canyon School) independent schools, schools that are boarding, single-sex and co-ed institutions respectively. He was one of three founding administrators of a brand new greenfield independent school built on the outskirts of Los Angeles into a K-12 institution with 850 students, a 35-acre campus and $80 million in assets during his seven-year tenure. Prior to making a switch to education, Sanje spent 15 years in venture capital, investment banking and senior C-level management. He was educated at Oxford University (B.A. and M.A. in Law) and the British independent school system (Harrow School). Sanje is based out of Los Angeles.

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