

Kelley Executive Partners

Spring 2017: Adult Education Program Interview

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### **Abstract**

The purpose of this paper is to examine the program planning process from an adult education organization perspective. There are many different areas of adult education but the focus of this discussion leans towards professional education and development. This type of adult education program will have goals of increased proficiency and effectiveness in specific areas related to workplace performance. One organization in particular, Kelley Executive Partners (KEP), specializes in delivering custom programs for companies and organizations. These custom programs are considered a major investment for each company because the company, typically, pays to send their employees to these programs; thus, creating an importance to have measurable desired outcomes and constant program assessment. To develop a better understanding the complete process of program planning from a local organization, a meeting was held with the Executive Director and materials were examined.

## Organization

Within the past year, Kelley Executive Partners (KEP) welcomed a new Executive Director and with him came restructuring (both personnel and procedures). This was a beneficial move because it addressed some inefficiencies that were present. Of course, because of this transition in leadership the organization's website does not reflect the updated mission and goals of the organization. To fully access the organization, a meeting was held with Ron Thomas, Executive Director of KEP. Mr. Thomas was able to provide additional insight into how the organization functions, a detailed example of the planning of one of the programs from the ground up, and additional materials he developed alongside other colleagues. Since these materials are not published or available online, Mr. Thomas reviewed the documents during the meeting and provided hard copies via email after the meeting. These materials will be included as appendices.

KEP serves as the "executive arm of the Kelley School of Business;" however, it is a "separate, not-for-profit organization affiliated with Indiana University" (Appendix A). Acting as a separate entity from the Kelley School and Indiana University, KEP has more flexibility to serve both university departments and a variety of domestic and international businesses. Even though KEP handles logistics for various academic departments, in which the students will receive program credit, it does not offer degree programs. In these instances, KEP provides a program planning (logistics) service. One of KEP's updated goals is to increase the number of its, custom, non-credit, adult educational programs for various companies and organizations. These programs can be delivered in-person, on-line, or a combination of both. Regardless of the delivery method, each program begins with a needs analysis so KEP can build a custom program

based on the needs of the company and its employees. With its flexibility in planning and delivering programs, KEP is considered a “full-service, management/leadership education provider” (Appendix A) that offers “strategic leadership development services in four primary modes” (Appendix B). These modes are “custom program development and delivery, consortium programs and services, open enrollment and certificate courses, and executive coaching” (Appendix B).

KEP serves companies with a wide range of business dealings so the nature of the organization must remain flexible. This flexibility allows KEP to work off a belief that every “company and organization has a unique set of environmental variables and organizational characteristics” (Appendix A). With so many variables affecting the program planning process, it is important for KEP to remain grounded to a core principle to ensure the programs that they design are successful. This core principle maintains that, within the field of management and executive development, “an educational strategy must be tied to organizational reality” (Appendix A). This core principle can be translated across a variety of different fields because, regardless of the program, the subject matter must be practical and applicable to the participants and their careers.

### **Adult Education Program**

KEP tailors adult education programs based on the needs of an individual company so it is difficult to evaluate all of their programs. One program, in particular, was designed to address multiple business related topics and the design allowed for employees from different companies to participate within the same program. This design allows companies to send smaller numbers of employees, divide some of the general costs, and it allows participants to learn from peers in

different fields. Even though the program was not, specifically, custom build for each individual company, the structure allowed for specific company interests to be addressed.

The Kelley Partnership for Leadership Development (KPLD) was a consortium designed to transition high potential leaders to the next level of leadership. KEP worked with senior leadership, talent development staff, and executive coaches to create this program. Based on an understanding of what skills a higher-level leader would need, KEP selected 15-20 skills that had behavioral anchors. Each company selected three to five people they identified as high-potential leaders and enrolled them in the program.

In order to account for proficiencies and areas for improvement, each participant had to complete a 360 evaluation. The participant completes the evaluation and then has other people complete the evaluation based on how he/she thinks the participant performs in certain areas. So, at the end of the initial evaluation, the participant, his/her peers, his/her subordinates, and his/her supervisors all completed an evaluation. This information is used in multiple ways. First of all, the information is used to help determine the curriculum for the program. For example, if 18 out of 20 people excel in the area of strategic thinking then it does not make sense to develop a program that involves a heavy focus on strategic thinking. If the evaluation results showed that a majority of the group had growth potential in the area of leading effective teams, that would become a focus of the program. Based on the cohort's evaluation results, six to eight competencies are selected as the driving force behind the curriculum.

Multiple companies sent employees so it was important to make sure that each company's interests were considered. A steering committee was formed to guide the design of the program and the curriculum. The steering committee consisted of a talent development staff person from each company. Each representative, in addition to making sure his/her company's

interests were represented, was responsible for providing a company specific problem/issue for their employees to work on during the program. This provided a built-in practicum in which the participant could immediately apply what he/she learns to a real-life situation. Having a company specific problem to solve also allows companies to see an immediate return on investment because the participants will be able to implement their new skills and improve the company.

The program design incorporated multiple levels of learning. The program utilized a flipped classroom approach. This method has the participants do a bulk of their learning new material prior to or outside of the classroom. The time in the classroom is reserved for practicing what they have learned through group discussions and work. Since the program is designed for working professionals, the cohort had three, three-day modules where they all came together for face-to-face learning. The time together with the group and faculty members was limited so it was important to use that time efficiently. There were, roughly, about four to six weeks in between each residential module. During the time in between residential modules, the participants continued to work on their company projects. This would include incorporating practices learned, research, data collection, making observations, etc. KEP recognizes the importance of connecting “learning for knowledge, knowledge for performance, and performance for impact” (Appendix C) and this is a driving force behind working on specific company problem. So the combination of self-directed learning, group interactions, and career applications stresses the importance of the core principle that “educational strategy must be tied to organizational reality” (Appendix A). At the end of the program, each participant would create a presentation to deliver to senior management that included an analysis of the company problem and the participant’s recommendation on how to approach or solve the problem.

## Evaluation

As mentioned earlier, each participant participated in a 360 evaluation prior to the start of the program. This initial evaluation was multipurposed. The 360 evaluation provided guidance on the curriculum to be addressed in a specific cohort. In addition to guiding the curriculum, the initial 360 evaluation provides a starting measurement that can be used to see how successful the program was. Two months after the completion of the program, each participant was asked to complete the 360 evaluation again. These results were then compared to the initial evaluation. A personalized report was created for each participant and his/her executive coach met with them to discuss the results.

In addition to the initial and final evaluation, the program was structured to receive feedback at multiple times during the program. After each three-day residential module, one participant from each company was selected to serve on a participant committee. This feedback session was organized as a round-table discussion where the steering committee and KEP staff would get immediate feedback from the students. Topics of discussion covered issues such as the room temperature, curriculum, program design, faculty, food, audiovisual preferences, etc. The benefit to having the roundtable feedback discussions immediate after a residential module was that the steering committee could work on adjusting the program before the next residential module. This is a very important component of the design process because it allows the program designers the opportunity to assess things that worked and things that did not prior to the end of the program. Rather than running an unsuccessful program, the planners can make necessary adjustments so the participants can participate successfully.

Other traditional forms of evaluation were incorporated into the program. For instance, a traditional questionnaire was given to the participants upon completion of the program. KEP

also attempted to include the steering committee members and/or senior leadership in the actual delivery of the program. If a member of senior leadership was available, they would be invited to the classroom to co-instruct, participate on a panel, or to sit in the class and provide contextual examples. Since they were involved in multiple levels of the program, KEP was able to get feedback directly from the company's senior leadership.

### **Director Analysis**

Mr. Thomas was very proud of this program. It provided multiple levels of participant interaction. Participants could engage in self-directed learning, group work with other professionals, one-on-one professional counseling sessions with an executive leadership coach, and real-time application of knowledge gained. Mr. Thomas admitted that the designing and delivering the program was a lot of work because it required the coordination of many different pieces. He mentioned it as particularly hard trying to coordinate the senior leadership schedules. Mr. Thomas noted that there was one thing that he could have done differently. He thought there was room for one more form of evaluation that addressed business acumen but it was not as critical as the other forms of evaluation that were already incorporated. Overall, he reported that all three groups of stakeholders (senior leadership, steering committee members, and participants) had positive experiences with the program.



## Appendix A



### **Overview of Kelley Executive Partners (KEP) Indiana University Kelley School of Business**

Kelley Executive Partners (KEP) is the executive education arm of the Kelley School of Business at Indiana University. We have been ranked among the top twenty providers of custom designed executive education programs in the world by *BusinessWeek*. We have over forty years of experience in the design, development, and deployment of custom executive education programs. Our clients include Fortune 500 firms, multinational corporations, and midsize companies, such as: 3M, Anthem Blue Cross and Blue Shield, Ashland, BAA, BAT, Caterpillar Financial, Cisco, Cook Medical, Diebold, Dow AgroSciences, Dow Chemical, EDS, Eli Lilly & CO., FedEx, General Motors, IBM, Indiana CPA Society, Ingersoll-Rand, John Deere Co., Milestone, Old National Bancorp, Rolls Royce, and United Technologies.

Kelley Executive Partners is a full service management/leadership education provider offering:

- Corporate and Public Online degree programs
- Online and residential certificate programs
- Blended and Residential general management & leadership consortia programs
- Online, blended and residential custom designed programs for individual firms and associations
- Leadership, Communication, and Team Coaching

KEP is chartered as a separate not-for-profit organization affiliated with Indiana University. This allows us greater organizational flexibility than a traditional university department, which means we can rapidly structure and deliver unique, cost-effective educational solutions to address the business knowledge and leadership development needs of our clients.

#### **Approach**

KEP is a leader in the field of management and executive development. The central lesson of our experience is the core principle of our approach – an educational strategy must be tied to organizational reality.

Our approach to the design, development, and delivery of executive education programs begins with contextual analysis. Every company and organization has a unique set of environmental variables and organizational characteristics. Consequently, efforts to link education to business performance must be true to the reality individuals face within their respective divisions, business units, or departments. Our analytic approach helps to identify the basic operating assumptions of a firm that filter new knowledge, and therefore, condition individual and organizational behaviors.

We are sensitive to the learning context of individuals within corporations. The most powerful learning is transformational; what individuals discover about themselves and their organization. This form of student-centered learning occurs by integrating the relevant work experience of program participants into the design of each course. We build bridges between structured learning experiences and the corporate operating environment of our clients.

### **Customization Process Overview**

Create a Project Team:

Kelley Executive Partners – 2-3 individuals (including faculty from the  
Kelley School of Business)

Client Firm – 1-2 individuals

Perform a Needs Assessment:

- Client Firm's original business case for the program is evaluated.
- Additional questions are surfaced in discussions among the project team.
- A follow-up assessment is performed, as required, via interviews and/or focus groups.

Curriculum Proposal Developed:

- Kelley team takes the lead in developing the first draft.
- The curriculum is reviewed and modified, as necessary, by the project team.
- Presentation to a final approving authority - individual(s) within Client Firm/Organization.
- Modifications, as required, and sign-off by final approving authority.

Curriculum Development:

- Subject matter experts identified within Client Firm/Organization will work with faculty in course development, depending on the degree of customization required.
- If a teaching case were to be developed, a Kelley case writing team would work with the appropriate individual(s) within Client Firm/Organization to both research and write the case.
- Online course syllabus with attached readings, exercises, and projects would be the final output.

## **Custom Program Prototype:**

An example of our custom education process is illustrated in the program we designed, developed, and delivered with a large service firm. The program was well attended, highly rated, and embraced by the headquarters.

A program is successfully designed when the end user specifications are defined and the company's performance objectives for those groups are imbedded within the educational curriculum. The design process is accelerated when these objectives are defined early, eliminating revisions due to misplaced assumptions or expectations. Another critical element to the overall success of a program is faculty knowledge of the corporation, which develops through regular communication with the client firm.

The leadership development program we delivered received the highest rating for a first run program ever offered by an outside vendor. Overall, participants rated the program in the top 10% of all programs.

### ***Process Overview***

- Our client did a thorough internal assessment, including a survey of employee professional development needs that was bundled with individual performance data to determine competency gaps.
- An internal team was chartered to address the results and to build a case for an educational intervention. An RFP process followed, and a university partner was selected.
- A new team was chartered composed of the client firm and the educational partner (Kelley Executive Partners). Roles were clarified; expectations were set, and an action plan was devised.
- Focus groups were held with potential participants, and a series of individual meetings were held with senior members in the firm and program faculty.
- A program design document was finalized. Materials for the program were then developed in parallel with the development and deployment of an internal communications plan to market the program.

### ***Material Development***

- Subject matter experts (SME) at our client's firm were identified to work with the program faculty.
- Client firm coordinated internal resource identification and scheduling meetings with program faculty to ensure timely completion of all teaching materials.
- Client firm SMEs provided program faculty with firm specific examples and data to enrich program topics.

### ***Internal Communication Plan***

The internal communication plan built awareness and reinforced corporate support of the program.

- A briefing document was written about the program. It outlined the process used for determining the need for the program, how the university partner was selected, and

- defined the program objectives and desired outputs. The document was intended to create senior leadership buy-in.
- An internal brochure was printed that outlined the objectives of the program and was distributed to all potential program participants.
  - Postcards profiling and quoting faculty members were sent to the participant pool.
  - A letter was sent to potential participants from a senior leader in support of the program. The senior leader described the program's purpose and the importance of participating.

### ***Participant Selection Process***

The client firm was purposeful in its selection process. The client firm gave participants the opportunity to list their preference of attendance by program dates and then finalized a list of participants for each class to insure a diverse group.

### ***Program duration***

The program was one week with 30-38 participants per program. It was repeated six times over the course of 18 months. The program was then converted from a field-sponsored to a corporate sponsored program.

## Appendix B

Kelley Executive Partners (KEP) currently provides its clients an integrated suite of strategic leadership development services in four primary modes: custom program development and delivery, consortium programs and services, open enrollment and certificate courses, and executive coaching. Individually and collectively, these four practices advance the mission, values, economic objectives, and communal good of our client organizations – helping them emerge and actualize through their inherent ability to create unlimited possibilities from finite resources.

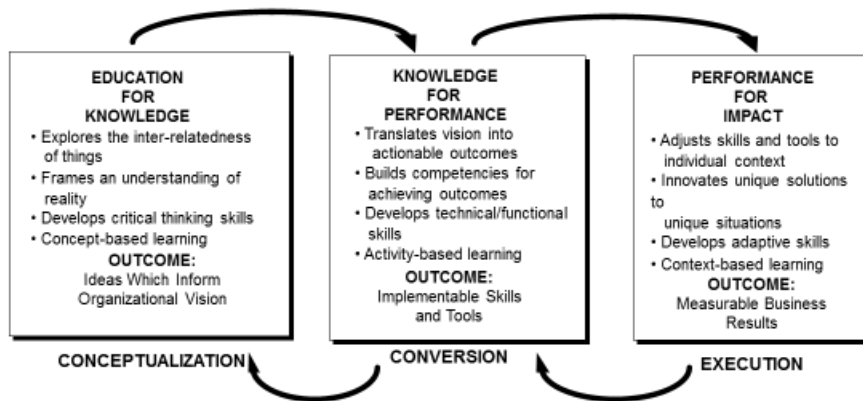
KEP believes that sustainable growth and change occur most naturally when strategic imperatives, economic objectives, work processes, and people development systems are synched up and integrated into a single, driving, organizational mission. We acknowledge that every client scenario presents unique possibilities for achieving this unifying imperative, and that no single solution or approach will be universally effective. Accordingly, we begin each of client relationships by obtaining a deep understanding of our client’s situation. We then work collaboratively with our client to develop strategies and tactics that are relevant and timely, and that truly fit their needs. Rather than simply delivering formula-driven programs, we work with our clients to provide, create, and shape context – leading us to an increasingly clearer appreciation of their present situation and an imaginative view of potential future states.

Our team has amassed a wealth of experience and expertise, and a substantial client list, through years of client centered work that has resulted in significant improvements for many organizations. We frequently work with groups that are dealing with significant organizational change, planning transition, or building performance after restructuring. Our work routinely involves constructing innovative learning environments and facilitating both large and small scale organizational change projects. We also work with clients on targeted initiatives such as assessing and developing leadership capacity, developing effective teams, enhancing organizational communication and cross-functional collaboration, transforming support services into customer-centered business units, and devising and deploying coaching systems.

### Representative List of Past and Current Business Partnerships

AT&T	Dow AgroSciences	IBM
BAA	Dow Chemical	Kimball International
BAT plc	EDS	MISO
Bayer	Eli Lilly	Roche Diagnostics
Berry Plastics	Fed Ex	Rolls-Royce plc
Cinergy	France Telecom	Whirlpool
Cook Medical	General Motors	Xerox

## Appendix C



Education can serve several purposes from (1) perspective building via the presentation of new concepts to (2) skill development via application of acquired knowledge to (3) behavioral change via use of acquired knowledge in different contexts. Each of these columns represents functions that historically have been isolated from each other. Column A is the traditional university role, column B is the corporate training and development role, and column C is the on-the-job coaching and mentoring that has been the role of supervisors. In today's business environment, we contend that these activities cannot be isolated from one another if education is to have a significant impact.