

IDEAL Distance Education and Blended Learning Handbook

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IDEAL Consortium
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A Project of the EdTech Center @ World Education

Acknowledgements

IDEAL Consortium (previously Project IDEAL) was founded in 2002 by Dr. Jere Johnston as a consortium of states interested in developing distance education programs to meet the distance learning needs of adults for whom classroom options were either not available or not a good fit. Under Dr. Johnston's leadership, collaborative research and program development facilitated by Project IDEAL demonstrated that distance education was a viable option for many adult learners. As a voice for member states, the consortium has shaped distance education policy at the state and national levels and provided professional development expertise for practitioners nationwide.

In 2015, Dr. Johnston announced his retirement and with that the closing of Project IDEAL at the University of Michigan. World Education, Inc., and its EdTech Center became the new home of Project IDEAL. Since the fall of 2015, the organization has been called the *IDEAL Consortium*. It continues to support the development of effective distance education programs for adult learners across the United States through new educational technology innovations and collaborative research and practice. We engage in this work mindful of the foundation on which it rests—the collaborative leadership and expertise of Dr. Jere Johnston and the early membership of Project IDEAL.

A key initiative of Project IDEAL was the development of the Handbook of Distance Education for Adult Learners by Dr. Leslie Petty and Dr. Johnston. The Handbook went hand-in-hand with an online course, *Distance Learning 101*, designed to help adult education practitioners set up distance programming and develop the skills to support learners studying at a distance. The Handbook went through four editions, each time incorporating the lessons learned in the years following each publication. This fifth edition builds on the fourth edition with substantial additions based on experiences in the field since 2008.

We would also like to acknowledge the efforts of Steve Quann, Leah Peterson, Kaye Beall, and Ebony Vandross from the EdTech Center at World Education, Inc., for revision suggestions and editing and formatting work; Judy Mortrude from The Center for Law and Social Policy (CLASP) for guidance on the Workforce Innovation and Opportunity Act (WIOA); David Rosen for input on blended learning; and, most importantly, adult education¹ administrators and teachers from IDEAL member states (particularly Adam Kieffer from Minnesota, Christopher Bourret from Rhode Island, and Diana Satin from Massachusetts) for ideas on how to update the handbook.



¹ "The Division of Adult Education and Literacy (DAEL) promotes programs that help American adults get the basic skills they need to be productive workers, family members, and citizens. The major areas of support are Adult Basic Education, Adult Secondary Education, and English Language Acquisition. These programs emphasize basic skills such as reading, writing, math, English language competency, and problem-solving."

<http://www2.ed.gov/about/offices/list/ovae/pi/AdultEd/index.html?exp=3>

Introduction

We welcome you to this opportunity to deepen your knowledge about distance education and blended learning. We see this as an opportunity to enhance your skills as a teacher or administrator engaged in implementing distance education in an adult education agency. This guide is not only for practitioners who are new to distance education and blended learning, but also those with some experience seeking continuous improvement or rebooting existing instructional practice or programming.

The Handbook is primarily a practical guide supporting the delivery of quality distance education programming. We will get more into definitions in the next section, but for now, understand that by distance education, we include overall educational programming that includes some aspect of instruction outside of a traditional classroom experience, including blended learning. This Handbook addresses both administrative and instructional issues that are at the core of successful distance education. The Handbook is informed by current research and policy guidelines and observations of effective practice documented by IDEAL Consortium members, past and present, and affiliated state leaders. IDEAL has served as a facilitator of collaboration and sharing of effective practice since its inception in 2002. The collective wisdom of past and current members is included here as the foundation for our interpretation about how to best leverage recent technological innovations for the good of adult education learners.

Structure

This 5th edition of the Handbook is the first to be created under the auspices of the EdTech Center at World Education, Inc. Though the structure of the 5th edition mirrors that of the previous editions authored by Leslie Petty and Jere Johnston (published by Project IDEAL at the University of Michigan), the content within each chapter has been rewritten to reflect the technology and attendant pedagogical

shifts required for effective distance education today, most notably the importance of blended learning in adult education.

This Handbook is organized in chapters reflecting important programmatic considerations. The guidance provided and reflection required in each chapter support the development of practical plans for distance education implementation. The end goal for readers of the Handbook should be the crafting a distance education program planning document.

Recruitment: Identifying and Recruiting Students

- Decide who, where, and how to find learners for your distance education program

Screening: Determining Who Is Ready for Distance and Blended Learning

- Identify which learners you can successfully support

Orientation: Setting Up Learners for Success

- Design an orientation that provides students with the necessary information and skills for a successful learning experience and a plan for reaching goals

Instruction: Models and Strategies Supporting Involved Instruction and Communication

- Learn about characteristics of involved instruction and how they are represented in different distance education models (e.g., supported distance and blended learning), the teacher role, and how to provide motivating and supportive feedback on students' work
- Consider how to develop teacher-created curricula and make use of Open Educational Resources (OER)
- Deepen understanding of how to make best use of proprietary online curricula

Assessment: Student Participation and Progress

- Build awareness of the different purposes assessment serves
- Explore multiple ways to gauge learner progress, including information needed to include distance learners in the National Reporting System (NRS)

Administrative Issues: Getting Started with Distance Education

- Learn how distance education is linked to WIOA guidelines and prioritized adult education initiatives
- Examine issues faced by administrators in implementing and sustaining distance education programs as part of their agency's educational offerings
- Better understand how to monitor data and distance education program performance

Each of these chapters will follow a similar format, beginning with an overview of the topic, followed by implementation recommendations, and concluding with a reflective activity designed to help teachers and administrators plan and implement a new distance education program or improve an existing program.

These chapters serve as the foundation for the IDEAL Consortium’s introductory online course, *IDEAL 101: Foundations of Distance Education and Blended Learning*. Fully developed versions of the reflective activities referred to at the end of each chapter are available electronically in the course for IDEAL Consortium member states. The final chapter, Chapter 7, discusses issues critical for setting up distance education from the perspective of a program administrator. Together the chapters provide structure for creating or revising a distance education implementation plan for your adult education program.

Changes from 4th Edition

- Updated content including use of blended learning models, Open Educational Resources (OER), mobile devices, and badging
- New chapter on Screening
- More explicit support for practitioners working in existing distance education programs
- Dynamic online format allowing for more frequent updates
- Links to multimedia (i.e., web-based videos, reports, and resource examples)

Things to Consider

We hope that you will think about developing or improving your distance education program systematically, considering each aspect of distance education programming defined in this Handbook. Whether you are new to distance education or using these materials to reboot an existing program, the different topics reflected in the chapters provide guidance. Either way, please keep the following points in mind.

- Do consider all aspects of distance education, using a holistic approach to program development or improvement. It is not enough to buy a license to an online curriculum and hire a teacher. The experience of the learner needs to be considered from the time they express interest in distance education through the time they are assessed.
- Think about doing this work in small, managed, and highly experimental projects. Start with one targeted group of learners, choosing appropriate learning materials for those learners. Perhaps choose one core curriculum when first beginning. Teachers can then identify or create supplemental activities to fill in gaps and further address skills as they become familiar with the curriculum over time.
- Provide the requisite number of staff with the support, training, and time they need to put your plans into practice.
- Keep reinventing. Technology is a dynamic beast! Both the technological demands faced by your learners and the learning resources available are constantly changing.
- Keep looking to expand quality programming with professional development. If you have an existing distance education program, use the Handbook with new instructors and

administrators. It can help them consider the issues they need to address in order to be able to implement your distance education program.

How to Use the Handbook...

... to create new programs

If you are setting up a brand new distance education program, you are likely using this handbook as a component of *IDEAL 101*, the foundations course. If so, here are some tips to make the most of the experience and end up with a useful and implementable distance education site plan to pilot.

- Be sure there is at least one administrator and one teacher working together in *IDEAL 101*. This way both administrative and pedagogical considerations will be included in the plan.
- Read the chapters in order. The issues covered in each chapter mirror the sequence of a learner's contact with the distance education program. If you go in order, you'll be sure to see how support for the learner unfolds.
- Allow time to participate in the *IDEAL 101* online discussion *daily*. *IDEAL 101* is a community of practice. Your learning depends on the contributions of others, and vice versa. Don't wait until the last day to post a comment. Do respond to each other frequently.
- After reading and discussing online, allow time for teachers and administrators at your site to work together to complete the accompanying activities. You need not be in the same place to do this; you could save the activities in Google Drive, so that you can collaborate over the telephone as you work together to complete them.

... within existing programs

We believe that teachers or administrators new to distance or blended learning—but coming into established programs—need to understand the ways that teaching in such models differs from strictly classroom programs. They also need to understand the reasons their agency's distance or blended model program is structured as it is. And, of course, they need to develop skills for teaching.

A good first step would be to review the list of teaching and technology skills for distance teachers in Appendix A and Appendix D. The resources provide the new teacher with both a deeper understanding of what distance (and to some extent blended) teaching entails, and a chance to reflect on the skills he or she already possesses. Discussing these resources with the program administrator provides the starting point for a conversation about what skills the new distance or blended model teacher needs to develop and to generate ways to provide appropriate training and support.

The readings in this Handbook are another useful resource for new teachers. They provide insight into the major areas involved in delivering distance education to adult learners and offer concrete examples

from experienced teachers. If enrolled in *IDEAL 101*, these new teachers should follow the *existing program's* set of activities in the course. These activities require the participant to review the distance education plan developed by the original distance teachers and administrators as part of their *IDEAL 101* course and then, working with administrators (if they are new teachers), complete the activities incorporating any fresh ideas that they might bring to distance education programming. Following this process an adult education agency can continuously update its distance education implementation plan. It may also be helpful to have the experienced teachers in an agency informally mentor new distance teachers and help them make the transition from classroom to distance or blended teaching. New teachers would also benefit from becoming involved in a community of practice where teachers support each other in their efforts to build their distance and blended teaching skills.

Accept Our Invitation

We hope that as you move through the information and activities in this Handbook you do so with your learners in mind. As with all educational programming, distance education implementation varies greatly depending on learner audience, resources available, and other context-specific characteristics. The goal is for you to be able to increase options for your adult learners and remove some of the barriers that may have prevented adults from entering or persisting in traditional classroom programs. This Handbook is designed to help you address the challenges that may arise as you engage in that work. We urge you to bear in mind that implementing an effective distance education program and developing the skills to become an effective distance education and blended learning teacher are endeavors that require time and hard work. One state director involved in the early days of Project IDEAL put it best when she cautioned against wanting “instant gratification,” and instead urged those new to distance education to realize that they need to nurture the fledgling efforts and allow time for growth.

We welcome you to join us in this work and to become a champion for distance education and blended learning. Our predecessors in this work, Leslie Petty and Jere Johnston, elegantly noted in the introduction to the 4th edition:

Perhaps the most significant insight we have learned from the state experiments is that it is the people who make the difference. We hear many stories about the one teacher, program administrator, trainer or state director whose excitement and passion for providing new ways to serve students inspired others to get involved, to get “out of the box” and explore, to innovate and excel.

The words ring true today and perhaps have taken on more urgency. In a time of technological ubiquity and programmatic priority shifts due to WIOA, adult education programs must give learners opportunities to use technology for learning and for problem-solving tasks that support both their academic development and the growth of technology skills. We believe that distance education and

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blending learning make this possible and that the path to success is through systematic experimentation supported by professional development and reflection.

~ Jen Vanek and Destiny Simpson

Chapter 1

Setting the Stage

This short chapter will provide some context to establish the importance of strong Distance Education programs and of blended learning in adult education, and how IDEAL has been able to support adult education programming in the past. The first two sections will provide language you can draw upon in conversation with adult education stakeholders and funders in your state. We will then set forth some shared terminology to be used throughout the handbook and get you thinking about how to proceed.

Why Build a Distance Education Program?

In the United States, adult education programs enrolled 2,012,163 learners during program year 2010–11 (U.S. Department of Education, 2013). Yet, this is only a fraction of the estimated 36 million adults in the U.S. who have basic skill needs or lack a high school diploma (OECD, 2013). Barriers such as lack of transportation or competing responsibilities from work and family often prevent these adults from participating in traditional adult education classes. This disparity has occurred in an environment of technological ubiquity in our society. Current demands for use of online technologies in work and daily life have prompted adult education programs to integrate more technology use to provide opportunities for learners to build technology skills while simultaneously building basic academic skills (Jacobson, 2012; Newman, Rosbash, & Sarkisian, 2015), but programs still struggle to find opportunities for learners to engage with relevant use of technology. Adding blended or distance learning is a fine response to the reality described above.

WIOA and Distance Education

Indeed, distance education is a named and prioritized initiative spelled out in the Workforce Innovation and Opportunities Act (WIOA), the federal legislation defining allowable programming in federally-funded adult education (*Workforce Innovation and Opportunities Act*, 2014). The Office of Career, Technical, and Adult Education (OCTAE)² fact sheet *Integrating Technology in WIOA* (2015) shows exactly how:

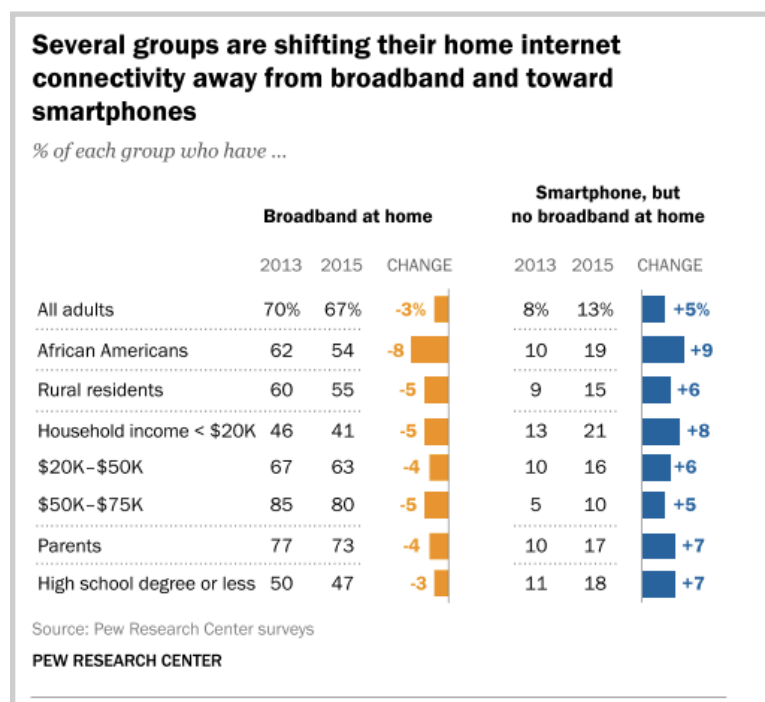
² Office of Career, Technical, and Adult Education; the federal agency housed within the US Department of Education that oversees adult education.

- States are required to provide technical assistance integrating technology into programs and allows for the following activities: “the development and implementation of technology applications, translation technologies, and distance education, including professional development to support the use of instructional technology” (p. 1).
- Recipients of AEFLA³ funding must be chosen based on, among other things, how well they “effectively use technology, services, and delivery systems, including distance education in a manner sufficient to increase the amount and quality of learning and how such technology, services, and systems lead to improved performance,” and further, that their “activities are delivered by well-trained instructors, counselors, and administrators...who have access to high quality professional development, including through electronic means” (p. 1).

Increased Access

This WIOA language is a response to a new understanding of the digital divide. No longer limited to describing access to digital technology, it is now conceptualized as gap between those who can use available technologies to access information and solve problems. Adult learners have more ready access to the Internet than ever before. A Tyton Partners study suggests “between 2.3 and 3 million students, or approximately 55% to 75% of the 4.1 million adult education students in programs today, own smartphones, based on analysis of survey data reflecting administrators’ and instructors’ views of student smartphone ownership” (Newman et al., 2015, p. 17). Further, based on past demographic data, they suggest that the number of adult education learners with smartphones will continue to rise.

Figure 1. Pew Research Center Findings on Internet Access



Pew Research Center has found that smartphone use is growing for all demographic categories, while home broadband access growth has leveled off. Even given the plateau, the research shows promising levels of Internet access for low-income families. The graph, featured in Figure 1, published by Pew Research shows the potential reach of teachers who might integrate use of mobile devices in their distance or blended instruction (Horrigan & Duggan, 2015). The full report can be read at: <http://www.pewinternet.org/files/2015/12/Broadband-adoption-full.pdf>

³Adult Education and Family Literacy Act (AEFLA) is Title II of WIOA, which deals explicitly with adult education.

This, along with unprecedented levels of Internet access in learning sites (Newman et al., 2015) suggests opportunities for equitable access to distance education and blended learning across the US.

Why Work with Other States?

Moving forward with this work, you are in good company. Data from the National Reporting System (NRS) shows the percentage of learners engaged in distance education programs across the US remaining fairly constant since data was made available in 2007 (3% of learners with at least 12 hours of distance education reported), and outcome gains similarly remained constant, 42% in 2007 and 43% in 2014. However, looking at data from several states engaged in Project IDEAL before 2015, we see improvement. For example, in Texas the number of distance learners grew from 43 in 2007 to 393 in 2014, the last year for which NRS data is available. Texas also boosted the percentage of distance learners achieving a level gain from 51% to 68% during that time. Another striking example spanning the same years is Rhode Island, which grew its distance education programming from 6 to 245 learners (with an increase in learners making a level gain from 17% to 50%).⁴ We understand that there are hidden variables that contribute to this growth, but we do believe that the collaborative nature of the IDEAL Consortium leverages the strengths found in each state for the benefit of all members.

Comments from education leaders involved in IDEAL support the numerical data shown above. One distance education leader in Minnesota stated:

Working with the IDEAL consortium has proven especially valuable in establishing relationships with distance learning practitioners in other states. Learning about various approaches has helped us in strengthening our distance learning programs in Minnesota. It has allowed us to be part of a larger community of practice.

Similarly, a leader in Arizona suggested that they have remained active in IDEAL because there is so much to learn, and one state cannot possibly test out all innovative distance education strategies in isolation.

Important Terminology

Working together means using shared terminology. We all need to know what is meant by the term “distance education” and other key terms. The previous edition of this handbook, published in 2008,

⁴ Drawn from data resulting from NRS Web tools: https://wdcrobcolp01.ed.gov/CFAPPS/OVadult_education/NRS/tables/index.cfm

suggested that it took a broad view of what constituted distance education, explicitly stating a preference for the term “non-classroom based learning”. By that we believe the authors attempted to expand a past conceptualization of distance learning as paper-based correspondence courses, stretching it to include learning at a distance through a broader range of technologies including cassette tapes, CDs, DVDs, and the Internet.

In this edition we build on this interpretation and consider the different models at play when using technology for instruction. Being explicit about such models requires a specific terminology so that we can be sure that we are referring to the same concepts when we describe the work to be done. Before we go further, let’s make sure that we have the same understanding of the terms that will be used in this handbook.

Distance Education (DE)—Most recently, distance education was defined in NRS Guidelines as follows:

Formal learning activity where students and instructors are separated by geography, time, or both for the majority of the instructional period. Distance learning materials are delivered through a variety of media including, but not limited to, print, audio recording, videotape, broadcasts, computer software, web-based programs and other online technology. Teachers support distance learners through communication via mail, telephone, e-mail or online technologies and software ([Implementation Guidelines, 2016](#)).

We use the term to refer to programming a bit more broadly. Distance education describes all aspects of programming that allows a learner to continue learning beyond the walls of a classroom. The chapters that follow are, in fact, organized by these aspects of distance education: recruitment, screening, instruction, assessment, and administration.

Distance Learning (DL)—Many programs use the term Distance Learning instead of Distance Education. However, in this Handbook we consider it to describe what *a learner is doing*; it is the student’s perspective of studying outside a classroom (Askov, Johnston, Petty, & Young, 2003) or, as suggested by the NRS guidelines, separated by time for the majority of the instructional period.

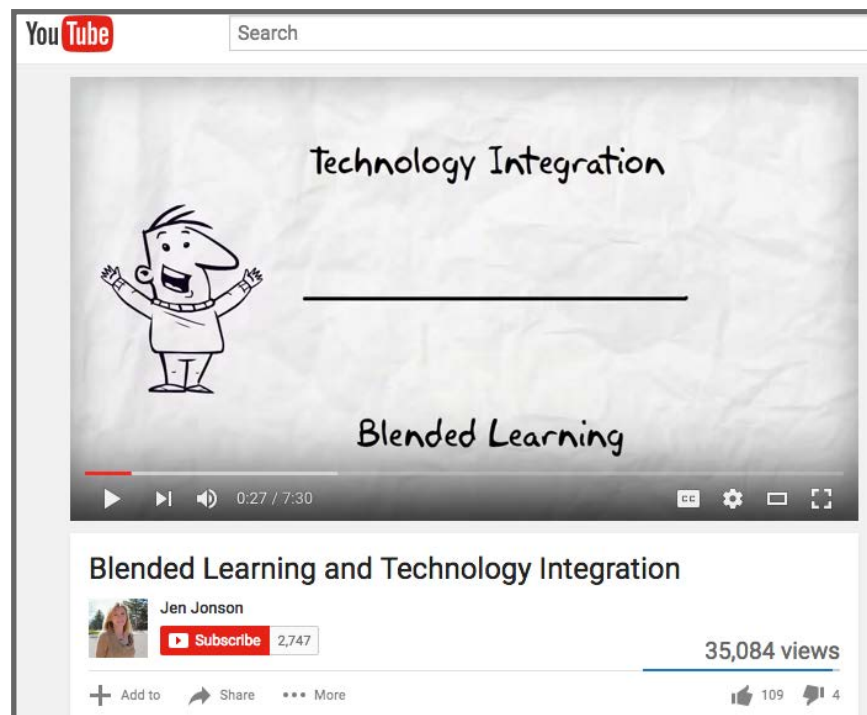
Pure Distance Education or Distance Learning—This describes educational programming that is nearly entirely delivered at a distance. In early pure distance education models, even orientation for distance education was provided at a distance (Petty, 2005). Very similar is *Supported DL*, in which a learner receives orientation in person but studies at a distance (Petty, 2005). This is definitely a more common model and is likely what people today think about when they consider distance education programming.

Blended Learning—This mode of learning occurs with a mix of instructional models. An early definition characterizes it as regular classroom instruction combined with distance learning, where distance is added to intensify or accelerate instruction (Petty, 2005; Porter & Sturm, 2006). In this model, the same teacher leverages the strengths of both online, independent learning (that likely happens offsite or in a computer lab) and in-class instruction. This combination of face-to-face and distance learning has been a

common general understanding of blended; in it the modes of instruction are complimentary. Note also that some states or adult education programs use the term “hybrid” instead of blended. The terms have been used interchangeably in research literature, with a preference for blended over hybrid.

The concept of blended learning has evolved over the past decade, informed by research done in the K–12 context (Murphy et al., 2014). Rosen & Stewart (2015) incorporate this research into their definition, describing it in a way that diminishes the importance of geographic distance and defining it as “a teaching and learning model that has a face-to-face class or tutorial component combined with an online learning component” (p. 3). A goal of this shift in definition is a priority to revolutionize schooling to make use of technological innovation to support personalized learning both in and out of the classroom.

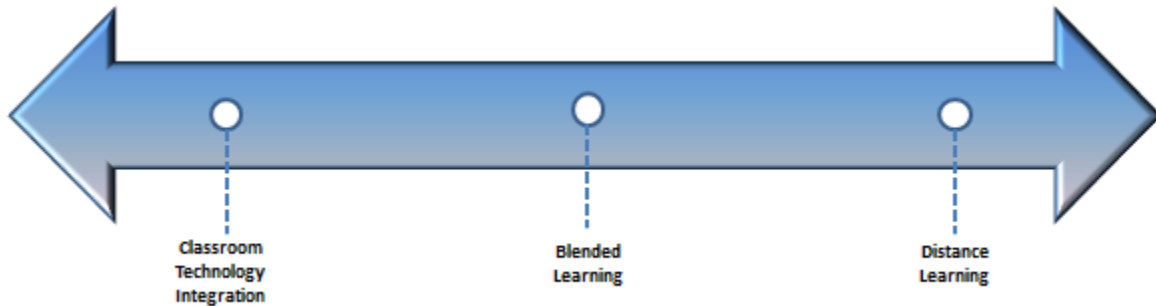
Classroom Technology Integration (CTI)—Equally important in the academic experience, but not to be confused with blended learning, is classroom technology integration. CTI helps teachers work more efficiently and provides the means by which to make learning more engaging. Professional development on CTI is critical because it can help teachers prepare learners for distance education, but we will not be covering it further in this handbook. However, it is useful to understand how it varies from blended learning, which moves the role of technology beyond that of a useful tool to support learning to being the actual place where the instruction, activities, and assessment occur. This distinction is nicely framed in this video. <https://youtu.be/KD8AUfGsCKg>



We see these models of instruction as providing a continuum of support available as learners engage with new technologies while learning. This continuum is illustrated in Figure 2. At one end of the spectrum is CTI, where teachers leverage technologies to support their in-class instruction, use class time to strengthen learners’ computer skills, or both. At the other end, under Distance Education, is Pure Distance Learning, where there is no in-person or classroom support for use of technology and very little teacher direction. In the middle ground, we have blended learning, considered here under the broader umbrella of distance education because some part of the instruction happens online and there

is a component of independent learning where the student controls what is studied, where learning occurs, and how much time is spent.⁵

Figure 2. Continuum of In-Person Support



Getting Started

Now that you have a sense of the importance of this work and understand different models and the terms we will be using to describe them, let's get started. A great first start is to consider the goals of your program, or perhaps where you situate yourself on the model presented above. Careful consideration of your resources, learners, state policies, and program goals will help you get off to a good start.

Reflect on these questions:

1. Who are your learners? What are their goals? What are their tech skills? When can they come to class?
2. What are the characteristics of your geographical location? Is your program hard to get to? Are there learners who don't come in to your program but might choose supported study at a distance?
3. What technology resources can you share with your learners? What technology resources do they have access to on their own?
4. What are the technology skills of your learners?
5. What are the technology skills of your teachers? What resources are available to strengthen them?
6. What flexibility do you have for establishing instructional content? Must you use a curriculum chosen at the state level? Are you allowed to choose your own or even create your own?

⁵ Note that the Clayton Christensen Institute has developed a very descriptive overview of blended learning that defines different blended learning models based on how these characteristics vary. You can find the models here: <http://www.christenseninstitute.org/blended-learning-definitions-and-models/>.

Answering these questions can help you narrow down your inquiry for the purposes of this professional development. Perhaps talk with other teachers or administrators at your adult education site and come up with some answers to the questions. After you do that, start to define your implementation pilot by completing the reflection in Activity 1.1.



Activity 1.1 *Getting Started*. Start thinking about how you will define your distance education pilot.

You need to start defining the focus of the site plan so that you will be ready to create one after you complete each of the chapter activities in this Handbook. Decide on the specific learner audience you will first invite to distance education programming. Also, begin to decide on the curriculum and other instructional resources you will use with them.

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

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Chapter 2

Recruitment: Identifying and Recruiting Students

This chapter guides practitioners through a process of determining *who* to recruit and *how* to reach them. When considering recruitment broadly, you need to reflect on this question: **Who are you recruiting and for what?** The answer to this question will help you decide the scope and focus of your distance education program. Will you deliver strictly distance options? Will you attempt to provide blended learning opportunities? The programming you want to create and the type of learner you suspect will persist will determine who you recruit.

What Audience Do You Hope to Serve Through Distance or Blended Options?

Agencies adding distance education or blended learning to existing educational programs need to consider when distance education and blended options will best support learners. For example, will distance courses offer new areas of instruction, or teach content parallel to classroom-based programs? Will distance courses be aimed at students already being served by the agency, or will the agency attempt to reach new audiences? These decisions should be made in the context of the agency's goals and missions, based on perceived needs of the agency's clientele, and prior to the start of the recruitment process.



Each program must determine how distance education will fit the needs of its target audience. For example, an adult education program in Minnesota working to support adult career pathways programming and college transitions worked to offer career pathways courses as blended learning opportunities. Understanding that most postsecondary institutions in Minnesota utilize online learning to some degree (Marchwick, Johnson, & Parrish, 2008), the agency wanted to help learners prepare for it by requiring online work. Thus, the first step in thinking about recruitment involves developing an understanding of the needs of the target audience.

What Skills Do Students Need to Be Successful?

You can most efficiently use program resources if you target the learner audience most likely to succeed. It is possible that you know which online curriculum you will be using or perhaps have already created or viewed supplemental materials created by others (e.g., Online Educational Resources). It is important to understand the technology and academic content demands of the chosen curriculum or learning activities before you decide who to recruit. In designing instructional content, curriculum developers and teachers make assumptions about the skills, abilities, and knowledge that learners need to be successful with their materials. Without the foundational skills and abilities associated with a certain curriculum, students are unlikely to benefit from the instruction provided in that curriculum. For example, an English language learner still working on literacy development would likely not succeed in an Adult Secondary Education-level science blended learning course, or a student who has limited prior experience using a computer will struggle with almost any online resource. While these mismatches may seem obvious, they highlight the importance of ensuring a good match between students' educational abilities and the curricula or materials the teacher is using. This match is even more important in distance education than it is in classroom learning because students learning at a distance typically receive less direct social or academic support than their classroom-based counterparts.

What Are the Appropriate Resources Available?

Knowing who to recruit and your means to support them go hand-in-hand. If choosing a core online curriculum for your distance education program, agencies should decide whether they want a product that is tailored to a particular group of students or one that serves a variety of learners with different educational needs and whether or not it is affordable. Some curricula target a particular audience. For example, [USA Learns](#) is free and designed to teach English language beginners through intermediate via videos and activities. It is also mobile friendly. An agency with very limited resources and serving primarily migrant adult learners, for instance, might choose this curriculum. [Edmentum](#), on the other hand, offers licensed products for students functioning at different educational levels with different instructional needs. Such a wide ranging suite of learning options might be suitable for an agency planning to serve whatever students self-select into its distance program or an adult education program hoping to offer blended learning in all of their program's course options or levels. Before choosing any curriculum, especially the licensed, fee-based options, it is necessary to perform a needs assessment that includes identifying the target audience and determining potential students' educational requirements, followed by an examination of the curricular products that might best meet those needs. This will ensure learners are well served.

What Characteristics Improve an Individual's Chances of Success as a Distance Student?

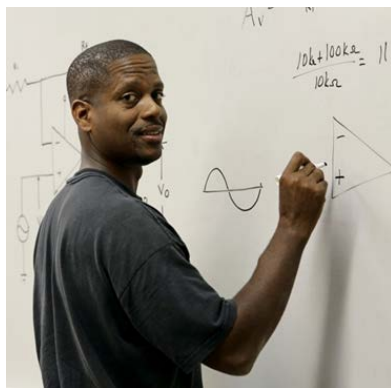
Whether you are teaching in a blended or strictly distance format, successful students are likely to be self-motivated, are able to work independently, and possess strong study and organizational skills. Some programs have suggested that the skills needed to succeed vary depending upon the model of distance education used. Students with higher academic skills, such as those studying for a high school equivalency test (e.g. GED®, HiSET, or TASC test), may be comfortable completing most of their studies

independently. Lower-level students, those who need more support, or those who are English language learners may fare better in a blended program that combines distance education with ample face-to-face interaction; however, anyone can learn online if there is balance amongst the learner's skills, the technology demands, and the support available (Silver-Paculla and Reder, 2008). Determining the type and amount of support is something that you can control.

One of the major differences between traditional classroom instruction and distance education is the amount of face-to-face contact students have with their teacher and other students. Learning is a social process, and the support of teachers and classmates can be an important element of the learning that occurs. Most teachers working in supported distance education⁶ (rather than blended learning models) may meet with their students only once or twice over an entire course, with the remainder of the communication occurring by telephone, email or through online learning communities. Additionally, these supported distance students have little or no face-to-face contact with other students taking the same course. This means distance students need to possess the characteristics (e.g., independence, self-motivation, and organization and study skills) that enable them to succeed without the extra support a classroom environment typically provides. Ways to determine whether or not these learners have these persistence characteristics will be discussed in Chapter 4, *Screening: Determining Who is Ready for Distance and Blended Learning*, but your recruitment strategies can be set to target learners who potentially possess them.

What Recruitment Strategies Are Most Likely to Reach the Target Audience?

Recruiting in Classrooms



For blended learning it is often best to start recruiting with your current students. Because they are known, teachers will have more information about whether they possess the characteristics described above. Some teachers figure out ways to involve their entire classroom, so recruitment is not necessary. However, blended learning for current students need not be offered to all students in a classroom. A key characteristic of blended learning is that it provides a means to personalize learning (Murphy et al., 2014), so it is ideal for assigning independent work to match student learning goals and needs.

Teachers can offer it as an extra learning option for students who can take on learning online and are willing to work toward completion of online activities independently.

⁶ A model of distance education where the learner comes to the distance education-delivery agency for testing, orientation, and periodic in-person instructional support.

Another approach is to recruit currently enrolled learners to participate in distance education that is not directly linked to classroom instruction. In the state of Minnesota these learners are called “dual enrolled” because the work done online intensifies learning and accelerates learner progress but is led by a designated distance education teacher, not led by the classroom teacher.

There are many creative ways to recruit current learners in distance education programming. Classroom demonstrations work well for showing students exactly what distance education learning resources or curricula look like. Announcements on electronic bulletin boards or posters can serve as a constant reminder that there are ways to intensify instruction. Additionally, agency websites or Facebook pages can be used to communicate with existing students. No matter the method, it may be useful to build in a step requiring the learner to be proactive about entering distance education. Completing an online form, sending an email to request information, coming into meet with a distance education teacher—these steps are all initial clues that a learner is self-motivated and engaged.

Using Facebook to recruit

I use a Facebook page for both advertising purposes and to try to connect with current students by posting interesting media that connects to learning. This way my students who are new to the Internet can get a sense of it as useful for getting information.

~ a teacher in Minnesota

Recruiting in the Community

In the early days of adult education distance programming, agencies conducted recruitment in the broader community using low tech approaches—flyers posted in libraries, community education centers, and restaurants frequented by English language learners. These methods are still useful, as are public service announcements or advertisements in local newspapers, public radio stations, and local cable channels. These efforts, when consistently sustained, can create name recognition of your agency in the broader community that may lead to personal referrals over time.

Many of the electronic means by which to connect with current students described above can be extended to reach out to community members with basic education learning needs. Because they will naturally reach adults who are already online, you are more likely to reach potential learners with some digital literacy skills. Consider posting information about distance education on your own agency’s website, as described above. Also consider partnerships with other institutions offering services to potential learners, for examples, libraries, employers, social service agencies that do not offer educational programming, or community based organizations who want to provide educational services but do not have the resources or expertise. Ask them if they will link to online information about your program on their websites.

Students who find you through these websites are clearly interested and have at least sufficient mastery of the technology to indicate that interest. Providing an application form on a website can serve as a way for such a learner to contact your distance education program administrator and also

demonstrates adequate digital literacy skills for online learning. Once the student has contacted the agency, an in-person meeting can be arranged, when students can be pretested (according to NRS guidelines), talk about goals, and determine whether distance education is an appropriate match for the students' educational goals and abilities. Additionally, such interagency collaboration can open doors to further collaboration.

Recruiting within Workforce Development Agencies and Partner Organizations

The Workforce Innovation and Opportunities Act (WIOA) defines allowable or required activities for federally funded adult education programs and sets forth funding for workforce development agencies and adult education programs. A critical shift from previous federal legislation is the requirement for unified state, local, and regional plans, in which states and local areas must articulate how they will collaborate in several key aspects. The first iterations of unified plans defining coordination of adult education and workforce development agencies went into effect on July 1, 2016.⁷ These plans will be required to demonstrate collaboration that could impact the way agencies view distance education programming, particularly regarding reaching potential learners in the workforce development system.

The relevance of distance education programming for workforce development agencies can be found in the Act itself. The skills required to work independently online are included in the prioritized list of Workforce Preparation Activities, defined in WIOA, Title II as

activities, programs, or services designed to help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills, including competencies in utilizing resources, using information, working with others, understanding systems, and obtaining skills necessary for successful transition into and completion of postsecondary education or training, or employment.

Additionally, WIOA requires opportunities for integrated education and training programs, defining such programming as

a service approach that provides adult education and literacy activities concurrently and contextually with workforce preparation activities and workforce training for a specific occupation or occupational cluster for the purpose of educational and career advancement.

This definition of services creates an opportunity for online basic skills development coordinated with occupational training. Consequently, distance education could be a valuable means of support interagency collaboration.

Additionally, the language of Title II (the section of WIOA that defines adult education) Sec. 223 calls for state leadership activities to support "alignment" activities, naming one-stop partners (federally-funded

⁷ Note that at the time of writing, these final plans were not yet implemented.

agencies that help adults find employment). Specifically, the act calls for provision of career pathways programming and is explicit about the need for collaboration across agencies,

(ii) the role of eligible providers as a one-stop partner to provide access to employment, education, and training services (WIOA, Title II, Sec 223 9 (A) and (C)(ii), 2014).

Because these service providers are now required to provide educational services to low-literacy adults (Required Elements Report, OMB, 2016, p. 19) and many are doing so for the first time, they will perhaps be open to participating in recruitment of distance learners within their client (they call them “customer”) lists. These workforce development agencies may be looking for the expertise of adult education practitioners, and the customers they serve would perhaps welcome information about ways to build skills and knowledge while they are also job seekers.

Finally, understanding the categorization of allowable activities and what is funded in the different sections of WIOA could help adult education programs collaborate with agencies funded under the other “Titles” of the Act. For example, Title 4, which deals with Vocational Rehabilitation Services (VRS), is a well-funded corner of the workforce development system. VRS offers job training and employment placement services to individuals with disabilities. It serves a large pool of job seekers who may not have previously been served by Title II programs but who have basic skill needs. Requirements in WIOA Title 4 include “provision of services to students and youth with disabilities to ensure that they have meaningful opportunities to receive the training and other services they need to achieve employment outcomes” (*Summary Description of Title IV of the Workforce Innovation and Opportunity Act: State Vocational Rehabilitation Program Notice of Proposed Rulemaking*, 2015). Adult education could potentially partner to provide that training, and since there is no specific dedicated funding for special needs in Title II (the part of WIOA that address adult education), partnerships with Title 4 funded programs could be fruitful for all involved.

Planning for Learner Recruitment



Activity 2.1 Characteristics Supporting Student Success. Think about what students will need to be successful in your distance or blended education program, based upon the curriculum and materials you will be using and your programmatic distance education goals.

Consider details for the distance course you will be teaching; if you will be using multiple curricula, select one to use as the basis for completing this activity. List course-specific requirements, and for each one, describe the material and technology access issues for your program, and the characteristics students need to possess to be successful. The more specific you are in detailing what you think the student will need, the more focused you can be in your recruitment.



Activity 2.2 Identifying the Target Audience. Identify the different places and the means by which you might find learners with the characteristics you identified in Activity 2.1.

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

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Chapter 3

Screening: Determining Who Is Ready for Distance and Blended Learning

Imagine this fairly common scenario for new distance education programs. You decide you want to use distance education to intensify learning for current learners. You might also decide to offer a new complimentary online component to your face-to-face classes, or provide a learning option for learners who cannot make it to regular class times or are on your program's waitlist. While all are good reasons to start using distance education, without careful coordination and marshaling of resources, the learners who start in this program are not likely to have the support they need to persist.

The impact of screening

Before we developed and implemented screening methods for our potential distance learners, we would enroll almost any learner who came to us. We quickly realized that we had to change how and in whom we invested one-to-one DL staff time because we had a 60% attrition rate; we had to aim for quality over quantity; readiness over willingness. After implementing screening measures, over the course of one school year, we lowered our attrition rate to about 25-30% within a given month. We're now able to use more precious DL staff time to focus on communication, support and persistence with our active distance learners, and less time trying to communicate with inactive learners.

~ a lead DE teacher in Minnesota

What often happens is a churn of orientation for new learners, constant follow-up to connect with learners who are not participating, and work to exit learners who have fallen off the map. Past IDEAL member states all seem to have stories about how this scenario played out and sabotaged new distance programming. Because resources in adult education are often in short supply, distance education programs have a finite amount of staff time available to support learners. Ideally this time is used in facilitating students' learning. In reality, there is sometimes a disproportionate

amount of time spent on administration and keeping track of learners. In situations like this, though it might seem counterintuitive, limiting the number of learners in a distance education program might actually strengthen the program, particularly in states that fund distance through proxy contact hour reimbursement generated by the time learners spend completing activities in distance education programs.

Implicit in this strategy is of course the priority to share distance and blended program opportunities with only learners who are ready. This readiness is characterized by learner strengths in several areas.

- academic readiness for particular content
- soft skills or habits of mind (e.g., persistence, time management, and goal setting)
- technology skills
- access to a computer and the Internet

While it may be tempting to offer distance education programming to everyone, we suggest implementing screening measures described below to be sure you have learners who can actually succeed. You can use the information learned to then prepare those students who are not yet ready.

Alignment of Learner Knowledge with Proposed Curriculum

It is important to determine if the student has the requisite skills (e.g., reading proficiency and computer competencies) needed to participate in online learning. First, this requires that instructors be familiar with the curriculum and instructional materials available for distance or blended learning. Secondly, teachers need to examine a student's academic skills and knowledge, which can be done with a formal assessment tool (e.g., TABE, CASAS, or BEST) and/or by informal means (e.g., observing the ease with which they read materials about the program and listening to their oral English skills as they talk to the teacher). Teachers working in a blended learning environment, who see learners in class, will likely have an understanding of their learners' academic readiness for online component of their course work. For students to succeed in independent online work, they must have the academic skills needed to handle

the work. Assessing students prior to instruction helps ensure the program is a good fit for students' needs and abilities.

Most agencies already have a system in place for evaluating new students, and it may be possible to expand that to assessing those students who will be required to use online resources independently. Some agencies require a particular assessment tool. However, it is important to make sure that the assessment measure is appropriate for the content being studied. For example, using a TABE test of reading ability may not be useful for students entering a distance learning program aimed at improving their oral English skills; using a test specifically designed to assess English language proficiency, such as CASAS, would be more likely to yield useful information. The more closely assessments match the curricular content, the more useful the process will be. (For more information about assessment and adult education distance learners, see the original Project IDEAL Working Paper 1, [Assessment and Accountability Issues in Distance Education for Adult Learners](#). Although published in 2002; it still has relevance today.)

How one agency assesses readiness

We use an independent study skills and a computer skills survey to assess readiness for the distance learning environment; however, these surveys are not used as the sole means for assessment. During orientation, we get a good idea how a student will fare when we work on setting goals and study schedules. The most successful students have self-knowledge concerning learning preferences and the environment in which they learn best. Most often, successful students have supportive family and friends, and work environments, which is another area discussed. Of course, students also need to be assessed for reading levels and so on.

~ a teacher in Minnesota

Assessment of Nonacademic Competencies

Learner persistence and success in distance education depends on more than students' academic skills and knowledge. Distance and blended learning require that students be able to organize their time, work independently, have good study skills, and solve problems using technology. Students who lack these skills are apt to flounder in a distance program. These noncognitive skills become very important in supported distance education⁸, where students are not enrolled in an onsite classroom-based course and teachers may meet with their students only once or twice over an entire course, with the remainder of the communication occurring by telephone, email, or through online learning features. Additionally, unless a blended approach is being used, distance students have little or no face-to-face contact with other students taking the same course. This means distance students need to possess the characteristics

⁸ As defined in Chapter 2, this is a model of DE where the learner comes to the DE delivery agency for testing, orientation, and periodic in-person instructional support.

(e.g., independence, self-motivation, and organization and study skills) that enable them to succeed without the extra support a classroom environment typically provides. Thus, early in program orientation or screening, teachers should find some way to assess such competencies. There are many ways to assess these characteristics, ranging from questionnaires to informal interviews with potential students.

Habits of Mind

Habits of Mind have been defined as the behaviors required to support learning and successful application of the knowledge that students already possess. Costa and Kallick (2000) list the following characteristics of Habits of Mind.

- Persisting
- Thinking and communicating with clarity and precision
- Managing impulsivity
- Gathering data through all senses
- Listening with understanding and empathy
- Creating, imagining, innovating
- Thinking flexibly
- Responding with wonderment and awe
- Thinking about thinking (metacognition)
- Taking responsible risks
- Striving for accuracy
- Finding humor
- Questioning and posing problems
- Thinking interdependently
- Applying past knowledge to new situations
- Remaining open to continuous learning

These habits come into play when one is faced with a challenge or needs to solve a learning problem. Such events require a learner to draw on prior knowledge creatively and not give up. [The Habits of Mind Self-Assessment Rubric](#) created by the Santa Clara County Office of Education provides a means by which to informally gauge Habits of Mind and can be used as a guide to conversation to help teachers and learners together determine readiness for independent work.

Problem-Solving Skills

Development of learner ability to solve problems that require technology (or to solve problems caused by technology!) is a current prioritized initiative in adult education because in today's world such skill is central to success in online learning. Problem Solving in Technology-Rich Environments (PS-TRE) was one of three areas assessed in the [PIAAC Survey of Adult Skills](#) in 2013. PS-TRE "involves using digital technology, communication tools and networks to acquire and evaluate information, communicate with others and perform practical tasks" (PS-TRE Conceptual Framework, p. 9). The most important thing to understand about PS-TRE is that it represents a process of problem solving that addresses the kinds of tasks that adult learners accomplish as "a consequence of the availability of new technologies," including how one sets a goal or establishes a plan to find and use information gleaned through Information Communication Technologies (p. 8). These characteristics of PS-TRE are important elements in independent learning online. PS-TRE, along with other cognitive skills can be measured through an online (though not free) assessment called [Education Skills Online](#). A forthcoming publication from the

American Institutes of Research describes how you might integrate explicit instruction and implicit practice of the problem-solving process in learning activities.

Other Assessments

In addition to the assessments described above, there are several online self-assessment surveys that help students determine whether learning independently online (in either distance or blended models) will work for them.

Sample Intake Survey—Appendix A of this handbook is a questionnaire developed by IDEAL Consortium leadership and informed by past member observations about questions required for intake. Students can take the survey alongside the facilitator in an orientation session.

OASIS Study Skills Survey—Although dated, this short online survey created by Illinois Community Colleges Online guides learners through questions about communication preferences, time management, motivation, and technical skills. It then provides a brief analysis of each response, describing how each response aligns with characteristics required for persistence in online learning.

Washington Online Readiness Survey—This self-assessment tool asks questions similar to those asked in OASIS, but instead of providing an analysis of each separate response, presents a numerical score reflecting a degree of readiness for online learning.

MNSCU Distance Learning Quiz—The Minnesota State Colleges and Universities system offers an online education readiness quiz covering motivation, learning preferences, time management, commitment, academic readiness, and technology skills/computer access.

Blended Learning Readiness Assessment—The Learning Accelerator is an organization whose stated mission is “to transform K-12 education by accelerating the implementation of high-quality blended learning in school districts across America.” They have published a stakeholder readiness assessment, a thorough systems survey that requires teachers, school leadership, and students to consider whether it is time to provide or engage in blended learning.

These questionnaires ask students about their need for teacher support, ability to work independently, ability to organize their time, and so on. Questionnaires of this type provide another method for determining the most appropriate educational plan for students. Concrete information about time usage, study skills, and the ability to organize are a valuable component of orientation for distance and blended learning students. Unfortunately, although the items in these surveys make intuitive sense, as of now, they have no research foundation. Though you could use any of the resources posted above, we encourage you to explore them, consider the requirements of your distance or blended program, and then create your own. [Google Forms](#) and [Survey Monkey](#) are both useful tools for gathering, organizing, and storing information. If your agency has Adobe Acrobat Pro, you can use that to [create forms](#) that automatically [transfer gathered information to a response file](#).

Digital Literacy Skills

Basic computer, telephone, and tablet skills (e.g., proficiency with common computer applications, Internet browsers, and use of email) are a necessity for students studying online. It is also critical that learners have a basic understanding of how websites and hyperlinking work, because conventions for print on the computer differ from conventions for print on the printed page. For example, while students know to turn the page of a book to find what comes next, they might not know that they need to scroll down on a Web page to see all of the information or follow an important hyperlink to needed information. Computer knowledge needed to study online includes such rudimentary skills as:

- Using the mouse to navigate on the screen and to click on appropriate items.
- Using a keyboard to enter text. While touch-typing is not essential, the student needs to have a level of comfort using the keyboard to enter responses and complete assignments.
- Being able to connect—and stay connected—to the Internet.
- Understanding how a Web page is set up, including using the back button.
- Managing new tabs in browser windows.

Students who are participating in a program using a mobile device may also require some additional skills such as downloading and installing apps.

Some sites have opted to observe students' computer use at an orientation as an informal assessment of their computer skills. One teacher responds to students who express interest in her distance education program with an email containing an attachment that students must open, fill out, and return to her. Students who can successfully do this, usually have the needed computer skills to take her distance course. It may be helpful to develop a quick checklist to assess students' computer skills.

The voice of experience

Students entering into a DL program with our institution are asked to spend a minimum of 8 hours in the computer lab. This allows for the student and teacher to get to know another; it allows for the student to become acquainted with the computer to be used in a supervised atmosphere; and it allows for students to understand what is expected of them, what their place is in their education and their goal attainment. In addition, since distance learning requires that students need to have good reading and organizational skills there is a questionnaire that students take to see if they will be successful in said program.

~ a DE teacher in Arizona

Some agencies participating in the IDEAL Consortium design their distance learning orientations to include an extended period of time for the student to explore the online curriculum. Several agencies have the student complete an entire online lesson during the orientation session. This allows the

teacher and students an opportunity to determine if students have the requisite skills to use the online program. It also gives students a chance to decide if they are comfortable with this educational approach, whether they possess the range of digital literacy required (both basic computer skills and higher-level skills like using technology to solve problems, and information literacy).



Many adult education programs and libraries across the country use the [Northstar Digital Literacy Assessment](#) to understand learner competency with basic computer skills, Internet, email, computer operating systems, Microsoft Office Suite software, social media, and information literacy. This popular and free digital literacy assessment was developed specifically for use with adult education learners. The standards, on which the assessment modules are based, were developed by librarians and adult education and workforce development practitioners. Each of the 10 available

assessments takes about 30 minutes to complete.

For students who need additional skills prior to beginning the distance education program, the agency may choose to provide training (for example, running a one- or two-session class on basic computer skills) or refer the student to an existing program (e.g., a regularly scheduled basic computer class). Teachers should be familiar with the resources available at their agency designed to help the students build the necessary skills to participate in the distance education program.

Computer and Internet Access

In a classroom setting, educational materials and technology are generally made available to the students (e.g., computer labs, tablets, and the Internet). Agencies are also likely to employ someone who is knowledgeable in those technologies and who can help teachers and students best utilize that technology. Students who cannot come into the agency to use these resources may not have access to the same breadth of technology and support. Though computer and Internet access among these adults is increasing at a very rapid rate, agencies must problem-solve ways to provide students with access to all of the materials and technologies they will need to get the most from their distance studies.

Some agencies have solved technology and distribution problems by providing open computer lab time where distance and blended learners can work online. Others have made arrangements with local libraries, public schools, community-based organizations, and One-Stops to allow use of their computer labs. In Rhode Island, the [RI Family Literacy Initiative \(RIFLI\)](#) lends tablets and mobile hotspots to enrolled learners who do not have home access. There are also nationwide programs that support home broadband connections. [Everyone On](#) is a nonprofit expanding access to high-speed, low-cost Internet

service and refurbished computers by partnering with local Internet service providers, municipalities, and local nonprofit organizations. A range of broadband options are available at a fraction of their usual cost to families with school-aged children who qualify for free or reduced cost lunch. Similarly, the [Federal Communication Commission's Lifeline Support for Affordable Communications](#) expanded program coverage from telephone to broadband in spring of 2016. The program provides a discount on monthly service of \$9.25 per month for eligible low-income households. Subscribers can use the benefit to purchase wired or wireless services from participating broadband providers.

Skills Training

If a student does not have all of the requisite skills, additional training may be required before allowing the student to study at a distance. You may wish to do an analysis of the online materials that are used in your distance and blended learning and then focus training on the skills required for student success and persistence. Activity 4.1, *Technology Training*, presented in the following chapter, will help you articulate exactly what those skills might be.

Defining Learner Readiness



Activity 3.1 *Screening and Learner Readiness Checklist*. Describe how you will measure a range of readiness characteristics and then how you will respond if learners require further preparation to succeed in online learning.

Consider the needs of your learners, resources available, and administrative processes at your agency and develop a list of readiness characteristics that you will use to determine who is ready to be a distance or blended learner in your program.

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

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Chapter 4

Orientation: Setting Up Learners for Success

Many distance educators assert that orientation is a key component of retention. In a longitudinal experimental study, Porter and Sturm (2006) found that learner persistence in distance education programs was connected to the quality of the orientation received prior to instruction. A key attribute of successful orientation programs was the time spent building a relationship with the instructor. A carefully planned orientation can provide an opportunity for the learner to get to know the distance education or blended learning instructor and provide time to address a wide range of issues that prepare learners for a successful and positive experience. During the orientation, students build rapport with the teacher and are introduced to the curriculum materials and to the concept of working, at least in part, independently. In addition, orientation allows the teacher to determine if a particular program is a good match for students' interests and abilities and to determine if students have the requisite skills to succeed.

Orientation can also be a time when teachers help students set goals for participating in the program and clarify expectations for course participants. Study skills, strategies for working independently, and computer skills can also be addressed. Finally, orientation provides a way for teachers to take care of “housekeeping” details, such as collecting contact information (e.g., a telephone number, email address, or Skype name). This orientation is best accomplished face-to-face. In fact, in the early years of Project IDEAL, some states initially allowed students immediate access to online distance education programs without an in-person orientation; however, they have changed their approach and now require students to attend an orientation at a local adult education agency. Face-to-face meetings are also necessary for pre- and post-testing if students are to be included in the NRS (This is discussed in more detail in the Assessment Chapter.).

Elements of a Solid Orientation

Some elements of orientation for distance learners are similar to what typically occurs for classroom programs. Teachers and students are introduced, students learn how to use the curricular materials, and course requirements are discussed. Orientation must also include activities that establish realistic expectations for distance study and provide students with a sense of how their distance learning experience will proceed. This is particularly important because, although students have an idea of what is likely to happen when they step into a classroom, they do not bring a similar history to distance education.



Duration and Structure

How long should an orientation be? This depends on what an individual agency determines it needs to include. Some agencies may decide their students will be prepared after a single four-hour orientation. Others may decide that students need a more comprehensive, multipart orientation adding up to 6 or 8 hours. A few agencies have created orientation programs lasting 12 hours (at which point the students can be officially designated as distance learners in NRS reporting). Each agency should determine how to structure its orientation to best prepare students. For examples of useful orientation materials and activities, check out the Minnesota Department of Education/Adult Basic Education website, which shares [resources for setting up effective distance education program](#).

Agencies have offered both group and individual orientations for distance students. Group orientations are more efficient for the teacher and allow the student to meet others who will be working at a distance or participating in a blended learning cohort, which provides an opportunity for students to develop social support systems for their independent work. On the other hand, individual orientations may be more comfortable for students who might need individualized support to prepare for studying online.

The rest of this chapter explores the following issues:

- Setting and monitor learner goals
- Accessing technology
- Determining the content of product-specific and technology training
- Helping students develop independent planning, organization, and study skills
- Setting expectations for study time
- Handling orientation at a distance

Identifying and Assessing Learner Goals

Orientation session example

We are trying out a 4-hour, small group orientation, where we first meet learners who filled out an online form to apply. During the meeting, we'll gather all the information we'll need to set up the spreadsheet to track all of our learners. We'll create a learning contract for each learner, going through it individually with each person. We'll also give them their Skills Tutor log-in info and have them practice right then, doing an orientation to it while they practice clicking around. Finally, we'll pass out a student schedule, showing computer lab and DL support hours. Extra instructive website links are provided in a document.

~ a DE teacher in Minnesota

Orientation is the time for learners to identify their goals for participating in distance or blended learning. Many agencies have goal setting as part of their usual intake process, and the information gained there should be given to the distance teacher. In addition to this, agencies should definitely consider additional questions about goals specific to distance education for the distance education orientation. This information is not only useful to the student, but assists the teacher in meeting the student's needs and whether a distance or blended model is a good fit for that particular student.

Educators should look carefully at ways in which they can use goal setting to help guide their instructional planning. Asking questions about goal setting means going beyond information required by the NRS (e.g., obtain a job, earn a high school equivalency diploma, and improve literacy skills). These goals are a good starting point to guide students into the appropriate type of program (e.g., English language learning, high school equivalency diploma, or career pathways). However, to use goal

setting as a basis for instructional planning, the goals need to be at a much more specific level—similar to what many educators call “objectives.”

This involves breaking up the larger goal (e.g., get a high school equivalency diploma) into smaller steps that the student can accomplish in a realistic time frame (e.g., learn the algebra required on the high school equivalency test during the next semester).

These more specific goals or objectives provide the teacher with direction in planning educational programming to meet the students' needs. They can help the teacher select the appropriate materials for students and provide a yardstick against which to monitor students' progress. Additionally, it may be helpful for the teacher to periodically revisit the goals with students. This allows the teacher and students to assess progress, adjust the instructional plan if needed, and refine the goals to reflect the students' growth. Used in this way, goal setting is not simply something required by reporting

forms, but a valuable component of students' educational plans. (See Project IDEAL Working Paper 3, [Using Assessment to Guide Instructional Planning for Distance Learners](#) for more about this topic.)

The importance of orientation

Orientation is a critical part of the distance education program. It allows students to learn more about the expectations of the program and to learn what support they will receive from their teacher. We are also adding a career awareness piece to our orientation in order to identify the goals of our students and allow them to begin to develop career pathways plans. This will help us to better support transitions to the workplace and postsecondary education.

~ a teacher in Pennsylvania

Technology Access

New students need to know how to access learning activities and how and where they can access a computer if they do not have one at home. Additionally, if they are using their own laptops, tablets, or smartphones to access course materials, they might need additional support. You should ask learners to bring these devices to the orientation to be sure learning resources can be accessed on them.

It may be helpful to provide students with a “quick reference” sheet listing pertinent information (e.g., contact information for the teacher, step-by-step instructions on accessing the online component of a curriculum, and web address of a website linking to supporting online activities) for later reference.

Curriculum-Specific Training

A well-designed orientation provides the opportunity to train students in the skills they need to be successful with the learning activities. Clearly, students need to understand the program and how and when to use various components. Some popular commercially licensed curricula make orientation materials available. For example, Edmentum offers a [student orientation for Plato](#) and Burlington English provides a [comprehensive orientation program](#) that can be used to train teachers on how to use the program and by teachers to train their students. These resources may have too much information for every learner, but illustrate well the breadth of skill required for successful engagement in learning activities. You may want to create your own help document based on the information provided. You could also cover all the required information in a PowerPoint presentation or short video that could be posted on your agency's website so that students can go back and review it again.

Setting Expectations for the Class

Orientation is the ideal time to set the expectations for the distance learning class or the online portion of a blended learning model. This ought to include what the student is expected to do and what the student should expect from the teacher. This is the time to spell out in detail the course requirements. For example, some agencies use distance learning classes as a less formal educational opportunity and choose not to impose many requirements, while others view the distance learning class as a structured (but non-classroom-based) learning experience. Whatever the expectations, they need to be communicated to the students. The questions below are designed to guide teachers in setting expectations for students.

Level of Structure

One of the first things to get established is the amount of structure that will shape the learner experience and to make sure the learner understands this too. For example, you may require a specific timeline and order or, alternatively, the student might be free to explore the material on his/her own. Make sure the answers to the following question are included in your orientation.

- Are there due dates for completing student work? Does this vary depending upon the learning resource being used?
- If there is nondigitalized student work, how and when will it be given to the teacher?

Feedback and Expectations

You need to decide what type of feedback students will receive on their work. Licensed curricula provide opportunities for feedback through auto-graded quizzes and learning activities. In addition to this feedback, distance education programs must consider what other feedback and support they will provide by answering the following questions.

- How does the teacher respond to students?
- How quickly should students expect teacher feedback on their online work?
- What should students do if they have questions?
- In a blended learning model, how much class time, if any, will teachers use to review content, answer questions, or give feedback on a learner's online work?

Marking Progress

Recognition of progress is particularly important for students working entirely or partially at a distance. Be sure your learners know how you will help them gauge their progress and share it with you.

- Are students required to take progress tests embedded in the online curriculum they might be working on? If so, how and where will this be done?
- How and when will pre- and post-testing for reporting purposes be handled?
- Will the student earn digital badges or certificates to mark incremental goals or completion at the end of the course? What are the requirements in order to receive this recognition?

Planning Communication

Regular communication, whether a learner is making progress or not, is important for supporting persistence. Be sure your learners know how you expect to communicate.

- Communicating online. Make certain that both the student and teacher have each other's email address or Skype names. Make sure the student knows how to access an email system or an online synchronous communication tool like Skype. If a learner does not have an email account, be ready with a current list of free email providers.
- Telephoning and texting. Specify the times the teacher is available for calls and the number that a learner should call. Many adult learners text, so establishing expectations about texting can be very useful. Applications like [Remind](#) make it possible to send text messages without sharing a telephone number.
- Visiting during office times. Identify when and where these will be held.
- Talking during virtual office hours. If teachers and students are comfortable with the technology, this could be a regularly scheduled time during which the teacher is available online for communication like Skype, Google chat or Facebook chat.

Formalizing Expectations

Many programs have had success with using a learning contract to make the responsibilities and expectations for both the teacher and the learner clear. Teachers might use a contract, crafted to spell out the specifics and requiring a student's signature. A contract helps keep the student focused and increases the likelihood of staying engaged. Programs using this approach may find it necessary to renegotiate the contract at various points in the distance learning process.

Another approach some programs use requires students to complete an agreement or provide a nominal deposit for borrowing learning materials. In Minnesota and Rhode Island, some adult education programs offer use of tablets and Internet hotspots for the time they are enrolled in courses, and both require user agreements. The more clearly expectations for all parties involved are presented before the start of the class, the more smoothly things will operate throughout the class period. Be as specific as possible.

Orienting Learners in Pure Distance Programming



Most of this chapter has discussed orientation from the perspective of programs that conduct face-to-face orientations for distance or blended learning. However, some states have pure distance education programs (e.g., Missouri and Pennsylvania) where the majority of instruction is delivered at a distance. The students either find these programs online, through a statewide referral service or through another referral source. These students complete intake, assessment, screening, and orientation in person at a local adult education agency. Learners may also complete additional orientation activities at a distance. This may be done synchronously

through webinars as well as asynchronously using online activities.

For example, Pennsylvania uses webinar technology to introduce students to the program, discuss distance learning expectations, and allow students to practice using the technology that will be used during the program's weekly online classes. Missouri has students complete online activities that walk students through the steps of developing a distance learning plan and exploring the curriculum. Both states' distance teachers support students through the orientation.

Although it is possible to orient students completely at a distance, past experience in the IDEAL states argues against doing this for logistical, pedagogical, and accountability reasons. States have found that students benefit from some amount of face-to-face orientation. Face-to-face orientations are consistent with the growing preference for using a blended model of distance education to serve adult learners. Pure distance learning programs may find that additional orientation activities need to be completed at a distance to fully prepare the student for distance learning. However, students should be supported as they work through these activities by a distance teacher.

NRS Requirements

Finally, orientations provided at a distance do not fit well with the NRS requirements. Standardized testing must be conducted face-to-face in a proctored setting. In order to report distance students in NRS data, a totally distance-based orientation is not an option, as they must come to the agency for testing. Some states have discussed making arrangements with local libraries to provide proctored assessments of students in locations closer to their homes and then conducting the remaining orientation activities at a distance. In addition, distance learners must have a minimum of 12 hours of contact with the program if they are to be counted in federal reporting. This can be a combination of face-to-face and virtual contact “where student and program staff can interact and through which learner identity is verifiable.” (NRS Policy Regarding Distance Learners, 2016). Thus, in order to meet NRS requirements, at least some components of intake and orientation need to be done in a face-to-face setting.

Orientation is for supporting planning

When orientation activities are completed at a distance, I strongly believe that it is important to provide support to students. The orientation should not be used to screen students for distance learning appropriateness, rather as a time to support students' planning and gaining skills that will support their distance learning success.

~ a teacher in Pennsylvania

Craft Your Orientation



Activity 4.1 Technology Training. Consider the skills needed to make use of specific curricula, communication tools, and web-based materials.

Identify the features of the curriculum or technologies for which students will need training and explain how you will provide this training during your orientation session. Please think broadly about the technology demands of the many aspects of instruction, practice, and communication that define your distance or blended program.



Activity 4.2 *Elements of an Orientation Plan.* Begin to lay out the elements of an orientation plan for your distance education or blended learning program.

List the components you want to include and describe how you will implement each of them. Your plan should be geared toward a specific curriculum you will be using. The goal of this activity is to have a plan you can put into action with your students, yet allow you to remain flexible enough to meet the needs of individual students.

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

References

Porter, P., & Sturm, M. (2006). *Crossing the great divides: Distance learning and flexible delivery in adult basic education*. Ontario: AlphaPlus Centre. Retrieved August 4, 2016, from: http://alphaplus.ca/fr/oalcf/technology-planning-roadmap/cat_view/68-all-publications-and-reports/41-crossing-the-great-divides.html

Chapter 5

Instruction: Getting Started

Online teaching in adult education, whether it happens in class or at a distance, is ever evolving. These changes are due to advances in technology and curriculum products available, but most significantly, change has been made possible by the knowledge shared by teachers working in IDEAL Consortium states in years past. The lessons learned by these teachers have shown that many of the major functions of a distance teacher mirror that of a classroom teacher, yet the tools and methods for accomplishing these teaching activities need to be different. This chapter introduces an approach to distance and blended learning instruction that encompasses both what we have learned from these teachers and the opportunities made possible by new technologies.

The most important lesson of the past is that, in distance learning, even though learners work independently with an online curriculum, teachers play a vital role in providing instruction, feedback, and support. Since many adult education learners may not have had previous distance or blended learning experiences, teachers must endeavor to guide them, assign supplemental instructional activities as needed, and provide encouragement as students work toward their goals. We call this approach *involved instruction*, where teachers are actively engaged in their students' learning.

Involved Instruction



Some of the first research on online distance learning in adult education shows that effective distance learning requires more than passing out login information to an online curriculum. Rather, it must include the following:

A continuum of instruction, ranging from high engagement in social interaction to individual independent learning opportunities that may include some minimal electronically mediated instructor to learner and one to one learner interactions" (Askov, Johnston, Petty, & Young, 2003, p. 67).

In another early and important study, Zhao et al. (2005) found that the amount of instructor involvement positively impacted the quality of the student experience: increased involvement meant increased success. They defined involvement as follows: *"extent to which instructor is involved in actual delivery of content and available for interactions with the students"* (p. 1846).

Minimally, this means a teacher assigns appropriate content and then periodically monitors learner work in an online curriculum and provides feedback or encouragement through email or the curriculum's communication features. This scenario, where a learner receives ample instruction from the curriculum itself, is useful; however, ideally, some measure of responsive teacher-student interaction should be a regular aspect of the learning experience. More teacher involvement could include periodic in-person (or telephone or Skype) meetings and the assignment of supplemental activities to support learning. Involvement and interaction could be fostered even further by creating teacher-facilitated opportunities for peer-to-peer interaction online. (See Appendix B for a list of key activities required to monitor and support learners at a distance.)

Such interaction is possible today because of improvements in technology, which allow for a great variety of instructional activities and communication tools. These technologies make both students and teachers more comfortable working online and increase student motivation and outcomes. As early as 2005, Richmond, Thacher, and Porter documented use of such interaction integrated into instruction of adult English language learners using *English for All* online. Interaction occurred in two ways: (1) writing practice completed in an online discussion and (2) face-to-face interaction in class. The interactive activities fostered the development of community, in which members supported each other with both academic content and technical aspects of the online work.

Benefits of Involved Instruction

Involved instruction is an important element for successful online instruction and learner persistence. In this approach, an instructor takes on the role of a facilitator and the online curriculum becomes a resource, not just the sole means of instruction. As a facilitator, an instructor mediates between the learner and the online content. This implies a significant level of teacher involvement is needed to support learner persistence. Essentially, because an instructor is more present, they can better provide support and learning activities that best suit a learner's needs. A student developing proficiency with online learning in this supportive approach can build the confidence and computer skills they need to succeed in online learning (Richmond, et al., 2005).

Components of Involved Instruction

What does *involved instruction* look like? In 2013, a Project IDEAL instructional strategies study group convened under the leadership of Dr. Jere Johnston to explore the state of adult education distance education instruction and to describe the practices used by teachers identified as “successful” by their state’s distance education leadership. The study group members interviewed these teachers and noticed similarities in their work that illustrate how to provide *involved instruction*. These innovative teachers had made use of the following strategies:

1. Used blended learning
2. Focused on using just one primary curriculum
3. Provided supplemental learning activities when learners required more instruction
4. Organized online learning using a digital homeroom, a website hosting links to all learning activities
5. Adopted technology tools to suit pedagogical and content needs
6. Made use of computer labs where they were teaching
7. Continued to learn themselves

The full report is called [New Models for Distance Classes in Adult Education](#). Here are tips gleaned from the study that can help you become a practitioner who provides involved instruction.

Strategy One: Use a Blended Learning Approach

Sometimes called “hybrid”, these learning opportunities blend classroom and online instruction. This model of instruction is effective because it extends the amount of time spent learning and allows teachers to intensify learning by differentiating instruction, providing differently leveled activities to suit the knowledge and skills of different learners. Additionally, learners benefit from ongoing support from the classroom teacher when learning how to learn online. With the teacher there to guide learners through



problems, misconceptions, and application of newly acquired computer skills, adult learners can move through learning material more efficiently and prepare to continue their education online if they have to withdraw from classroom learning. For learners who find they may have more time, it also may enable them to accelerate their learning by adding more study time outside of class, especially if the online component is well integrated with the face-to-face curriculum.

Peer-to-peer interaction is another benefit of blended learning. In class, conversation and support can prepare learners for online work. Face-to-face conversation and support creates opportunities for socially constructed knowledge, where classmates learn from and through interacting with each other. A blended learning teacher could extend this in-class interaction to an online space by periodically requiring learners to work in groups using cloud-based applications like Google Docs, email, or asynchronous discussion in blogs or a Facebook group, all of which are accessible on mobile devices. The impact of this interaction is not only the learning of content, but also developing the autonomy required for persistence and motivation in distance learning courses (Furnborough, 2012).

Most of the recent research defining blended learning, and examining models for its implementation, has been conducted in K-12 and postsecondary settings. However, in their book, *Blended Learning for the Adult Education Classroom*, Rosen and Stewart (2015) illustrate strategies that adult education teachers have found useful when teaching in a blended model. This guide is important reading for any adult education practitioner hoping to start using a blended learning model. Some key takeaways from the book are integrated into the tips below.

1. Know why you are using blended learning.

Decide on the overall goals for use of blended learning. Perhaps you want to move away from traditional, teacher-centered classroom instruction, moving it to videos and activities accessed online and using class time for collaboration and project work; this is a flipped classroom model of blended learning. Perhaps you want to leverage rich online resources to move to competency-based learning or support your agency's efforts to integrate development of College and Career Readiness Standards. According to Rosen and Stewart (2015) each of these goals is well-served by use of blended models, but we suggest being intentional in your work and be able to articulate the goals you have for embracing blending learning before selecting technologies.

2. Find out about student access to computers.

Explore your students' access to computers and the Internet both in and out of your agency. Rosen and Stewart (2015) provide a table that might be completed by doing an informal survey of your learners and considering your own knowledge about access to computers on site. See Table 1 (included with permission).

Table 1: Web Access at Home, Work, or Elsewhere and Web Access at your School or Program

	School or Program Web Access					
	#/% of students	1. No web access, and possibly no computer lab at program of school	2. Web accessible computer lab	3. Computers in class with web access	4. Multi-media project or in the class	5. Student portable digital devices used in class for web access
Web Access outside the program or school						
A. No web access at home; web access available only from library, at work, community computing center or from mobile device.						
B. Family Computer with web access						
C. Student has own computer with web access						
D. Student has tablet with web access						
E. Student has smartphone with web access						

(Table 1 from Rosen and Stewart, 2015, p. 32)

Rosen and Stewart also include a link to a survey on [student Internet access and computer skills](#), which can be used as is or adapted. Information gleaned from these information-gathering activities will help you make decisions about what technologies, including mobile options, you can use for your blended learning course.

3. Survey current technologies.

Acquaint yourself with the range of learning technologies that you might integrate into your blended learning course. The report from the IDEAL [instructional strategies study group](#) includes a glossary of several popular tools. Additionally, Rosen and Stewart (2015) describe useful resources in their book. (See [Blended Learning for the Adult Education Classroom](#), pp. 10–30.) Each piece not only describes resources, but provides contextualized examples showing them in use.

4. Choose a learning platform.

Often, the decision about curriculum is made for the teacher, but if not, decide whether what Rosen and Stewart call a “turnkey” online curriculum will suit your needs or whether you need to build your own online resources. In Section 4 of their book, they provide a logic model to help you determine which would be most suitable for your program. The exercise requires consideration of the following issues:

- Leeway given to teacher for making such choice (i.e., whether your state has a required online curriculum)
- Teacher preference
- Development time available, deadline
- Cost of licenses

(See [Blended Learning for the Adult Education Classroom](#), pp. 43–45, for the complete logic model.)

Whether you choose a turnkey or teacher-created environment, be sure it includes the features you require for your instruction, including structure of content, means by which to monitor learner work (e.g., teacher access to learner activities and/or reports of progress), accessibility that meets your learners needs (e.g., options for deaf or vision-impaired students), learner collaboration, and teacher communication.

5. Decide on communication strategies and tools.

Reflect on whether or not you will communicate with your learners online and how you will do so. Section 5, Teaching Tools for Students Using Blending Learning, in Rosen and Stewart (2015) describes some excellent suggestions. (See [Blended Learning for the Adult Education Classroom](#), pp. 54–60.) For example, within the first two weeks of a blended learning class, you might create a [WhatsApp](#) group, and during an in-person meeting, help students join and practice using it once a week for several weeks until they can use it without any trouble. You might also set up a process and timeline for [Skype](#) meetings, getting the learner’s Skype name and practicing connecting online.

6. Prepare students.

Allow ample class time to introduce students to any new technology and give them a chance to practice with your support. For example, don't only help students log in and navigate through features of a tool, but also make sure they can successfully get online on their own. Give them at least one opportunity to go through the process of logging in and initiating an activity to demonstrate they can complete work independently. Another idea is to show students the web page you might be using to coordinate instruction and communicate (See Use of a Digital Homeroom section below.). You might build activities into in-person meetings each week that require students to use the website, for example, to find and complete an assignment or to post to a blog. In both examples you are using in-person meetings to ensure that students can make best use of the digital communication tool that you have decided to use.


Strategy Two: Start with One Core Distance Learning Curriculum

Figure 3. Example Curriculum: USALearns

The screenshot shows a digital learning interface for a reading activity titled "Shin-Jun's Emergency — Reading Shin-Jun's Story". At the top right is an "Activity Menu" button. Below the title, a prompt says "Read about Shin-Jun. Click listen to hear the story." The main content area is split into two columns. The left column contains a photograph of three people at a construction site: a man in a blue shirt and yellow hard hat is kneeling and talking to a woman in a green shirt and yellow hard hat, who is sitting on the ground. Another man in a blue shirt is standing behind them. There are concrete blocks and debris on the ground. The right column contains the text of the story. Below the photograph is a "Listen" button with a speaker icon. At the bottom right, there is a "1 of 2" indicator and a "Next" button with a right arrow.

Shin-Jun's Emergency — Reading Shin-Jun's Story Activity Menu

Read about Shin-Jun. Click listen to hear the story.



Shin-Jun is a construction worker.

One day at work, he drops a block on his foot. He can't move his foot. He thinks it's broken.

His friend calls 911. An ambulance takes him to a hospital.

Listen

1 of 2 Next

Whether you are teaching in a blended or distance model, make use of a core online curriculum (e.g., Aztec, Burlington English, Edmentum/Plato, Learner Web, and USA Learns). Having ready-made content available in a core curriculum has several benefits:

1. Students can become familiar with the technology demands of the online environment and, through actively using it, build skills and confidence using web-based resources.

2. Teachers can become local experts on the curriculum, deepening both their knowledge of it and their skill tying it to classroom instruction in a blended model. They can then support other teachers within the agency who wish to integrate the core online curriculum into blended learning.
3. Student work within the core online curriculum provides a means by which teachers can formatively assess learners' needs for additional instruction and practice activities.

In a blended learning scenario, this online curriculum can be assigned to complement in-class instruction. For supported distance education, it may be the first means of instruction. Being an involved instructor means knowing the content your learners are accessing online, so once you know which curriculum you will be using, you need to thoroughly explore it, examining content, delivery systems, and its viability as an independent learning tool for your students. This requires an investment of time, but time spent will pay off when you are able to confidently direct your learners through the content and navigation required and assist them with basic troubleshooting. Taking on more than one core curriculum may not be possible; decide whether or not you have the time to adequately learn two curricula.

Strategy Three: Use Supplemental Learning Activities

There are times when even the most robust core online curriculum cannot cover all of the learning needs of a learner or classroom of learners, so you will need to find and evaluate supplemental resources. Why? Though most creators of online learning produce quality resources, what your agency or state purchases for use may not meet academic, language, or computer skill needs of all learners or be culturally relevant (Smith & Ayers, 2006; Hannon & D'Netto, 2007). Also, an online curriculum may not fully address the key shifts and standards outlined in the [College and Career Readiness Standards for Adult Education](#). Programs may find that students need additional practice reading complex text, citing evidence, and building knowledge. Teachers may also want to provide additional opportunities for rigorous math activities that focus with equal intensity on conceptual understanding, procedural skills, and fluency.

One way to address these issues is to integrate complementary resources using additional materials or websites. Content developed or self-selected by practitioners allows for more customization and is generally more learner-centered (Askov et al., 2003). There are plentiful resources available on the web, which are particularly useful in blended learning scenarios, where programs may lack resources to purchase licenses for online curricula relevant for a broad range of learners.

Open Educational Resources (OER)

One place to look for complementary resources is to search for Open Educational Resources (OER). An image, eBook, podcast, video, fully-developed online course (e.g. [EdReady.org](#)), or interactive learning activity could all be considered an Open Educational Resources. Officially, Open Educational Resources



are licensed very openly, through a [Creative Commons license](#); teachers can use them either as is or adapt them to better suit their learners. Because they are free and often adaptable, they are ideal supplemental resources for either blended or fully distance instruction.

You can find Open Educational Resources by doing a simple Internet search. If you use Google, access the advanced search option setting usage rights to show only resources that can be freely used or shared. More instructions for finding Open Educational Resources are included on an [OER support website funded by the US Department of Labor](#) website for programs with learners in Community and Technical College programs. Also check out [OER Commons](#), which includes links to fully developed lesson plans and learning activities. Consider the following guidance when selecting an OER.

Select standards-aligned content or content vetted by teachers. Make sure that the Open Educational Resources aligns with the standards that define your curriculum or academic program. One way to do this is to find content already vetted by teachers who understand those standards or who teach a course covering similar content.

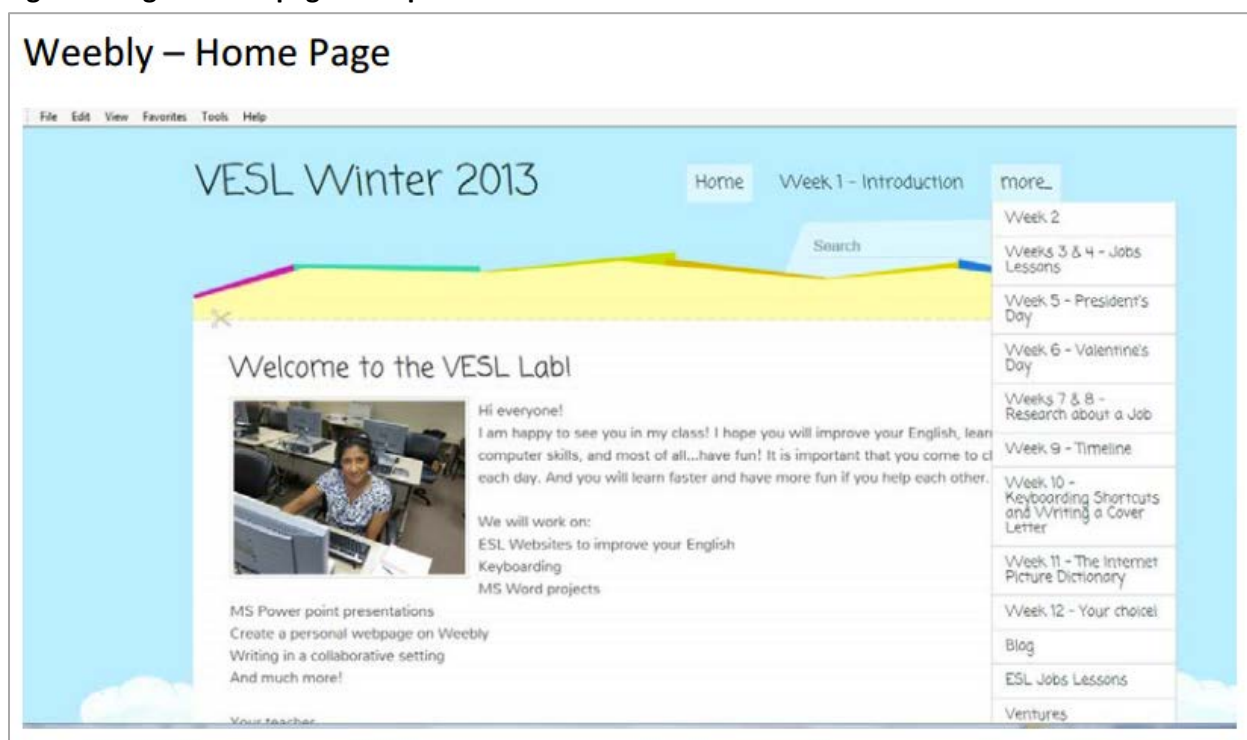
Choose a variety of resources. Not all Open Educational Resources will work for your class. Not only must you think about OER as a resource or materials that will support the learning objectives of a curriculum or even a lesson plan; you also need to consider the media or technology through which they are conveyed. Be sure that your learners have access to the technology resources and possess the computer skills to make use of them.

Ensure content is appropriate for your learners and existing system. Once you find a few that look promising, you need to evaluate how an OER will work for your learners in your particular context. [Achieve.com](#) has made available online [a rubric that teachers might use to evaluate the utility and suitability of an OER](#). You can adapt the rubric to best suit your instructional context. Because OER are plentiful, you will likely find resources that align with a wide variety of learners, learning styles, and technical requirements or limitations.

Strategy Four: Use a Digital Homeroom

Involved instruction requires active facilitation of learner progress and assignment of supplemental instruction (perhaps, the complementary resources described above) as required. Use of a digital homepage, often a simple website, used to add content and organize instruction and activities makes this easier. [Weebly](#) is a free popular website-building tool teachers might use for this purpose. See Figure 4 for an excellent example from a teacher in California who used Weebly in her blended learning vocational English as a Second Language course. [Google Sites](#) is free, too, but may have a steeper learning curve. Both are mobile friendly.

Figure 4. Digital Homepage Example⁹



If you work in a school district or college, they may already have an online platform, such as Blackboard, available for you to build a course or class website. They may even offer professional development sessions on how to do it.

Learners can make regular use of a digital homeroom to access all learning resources (e.g., links to the core online curriculum and key complementary online resources) and support documents (e.g., instructions for logging in, program information, and teacher contact info). Teachers interviewed in the Instructional Strategies study suggested that they were more likely to provide differentiated instruction to meet individual learning needs of their students when they had a website. Once a teacher had found and evaluated a resource, he or she could post it to a central location, rather than keep track of bookmarked webpages and emails to students. This strategy also puts the teacher squarely in the role of active facilitator, a critical characteristic of involved instruction.

A more sophisticated approach to a digital homeroom, a Learning Management System (LMS), allows a teacher not only to organize content but also to monitor learner progress. This is essentially a digital homeroom with reporting options and features to monitor and manage learner interaction with the content, the teacher, and other learners. Several popular LMSs are widely used in K–12 and postsecondary systems that also serve adult education: Canvas, Blackboard, Desire2Learn, Edmodo, Moodle, and Schoology. [Blackboard](#), [Edmodo](#) and [Schoology](#) offer free, limited versions to any teacher. (While Moodle is free, it requires uploading to a server and initial configuration and updating.) Other

⁹ (See more examples in the IDEAL [instructional strategies study group report](#).)

free LMSs include [Canvas](#), [Eliademy](#), and [Google Classroom](#). As more students access content via their smartphones, consider whether or not the platform is mobile friendly or provides an app.

This list is not exhaustive and will likely change each time you do a web search for LMSs. Such dynamic and constantly evolving learning technology is exciting to understand, but be careful to not go overboard! Strike a balance between looking for the next new thing and deepening your skills using just one LMS. Perhaps focus on how to use one well in your agency for an extended amount of time, and support each other as you build your own courses. This has obvious benefits for you as a teacher; you can share resources and knowledge rather than working alone. The benefit for learners is important to consider, too. As learners become used to learning in any one web environment, subsequent learning opportunities or courses in that environment will likely be easier to navigate through.

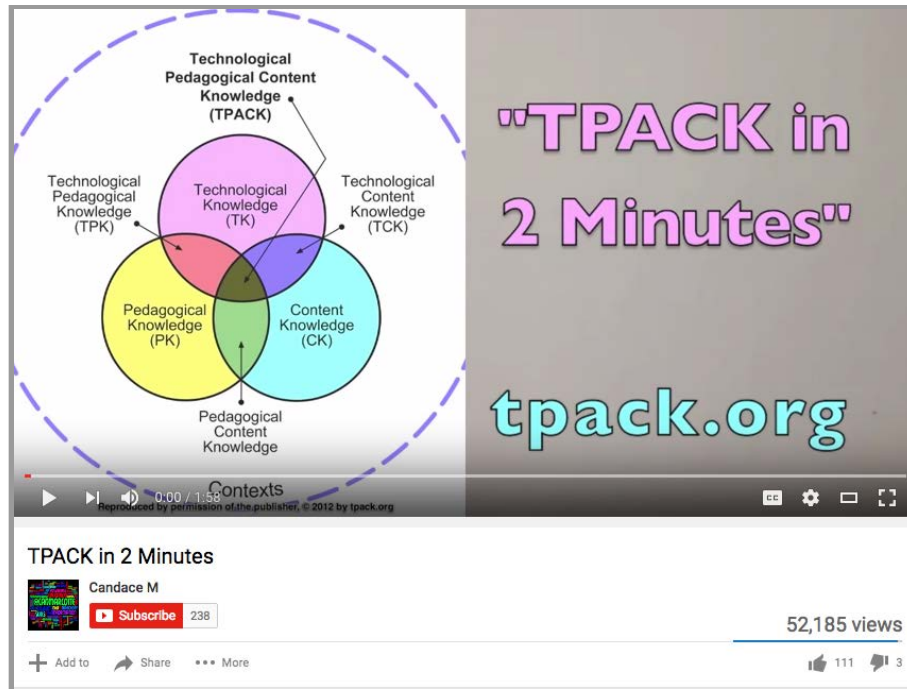
Why we chose our LMS

One of our main goals for using an LMS is for teachers to be able to share resources. I think we are coming to the conclusion that each LMS has its own pros and cons. In my agency, we choose one to use program-wide. Our decision is based on one teacher having deep knowledge of that particular tool and content already available. It is also free and we feel very friendly for low-level ESL learners.

~ an administrator in Rhode Island

Strategy Five: Adopt Technology to Suit Pedagogical and Content Needs

Successful teachers thoughtfully use technology to fit learner needs and content requirements. Rather than just leaping into new resources or technologies because they are novel, involved instructors need to balance encouraging learners to use new technology and using technology authentically to support the type of instruction and the demands of the content being taught. This is especially important in a blended learning scenario, where teachers need to decide which content is best covered in class or online. The Technology, Pedagogy, and Content Knowledge (TPACK) model can help teachers make decisions about technology use (Mishra & Koehler, 2006).



<https://www.youtube.com/watch?v=FagVSQIZELY>

TPACK pushes teachers to use their knowledge in the three areas to best provide instruction. Applying the model requires answering these questions.

- **Context.** What is my context? Who am I teaching? What are their goals? What resources are available?
- **Content.** What is the content that I need to teach?
- **Pedagogy.** What instructional strategies or activities will best suit the content?
- **Technology.** What technologies are required to effectively deliver the activities? How can technology be leveraged to make learning more interesting and engaging?

Answering these questions when planning blended and distance instruction supports a holistic approach to selecting technologies and resources that best support your instructional goals and meet learner needs.

Strategy Six: Use an Onsite Computer Lab

Many agencies provide onsite computer labs where learners can use the computers to complete online activities required in a blended learning scenario or even complete fully distance learning work. Making use of



an onsite lab allows learners to become proficient with online learning with the support of teachers or lab volunteers. The support helps learners develop computer skills while they are working on their academic content. Many agencies staff labs with volunteers from local colleges who already have the digital literacy skills and some personal experience with online learning.

Strategy Seven: Be a Lifelong Learner

The final important characteristic of effective educators is that they see themselves as lifelong learners. In the instructional strategies study group, the teachers interviewed revealed that they themselves embrace opportunities to grow as learners and are open to continuous experimentation with technology. This embrace of continuous learning not only increases your knowledge of useful instructional resources, it also helps one build the persistence and resilience needed to face whatever technological innovation comes next.

Other Considerations

Integrating Mobile Learning

While use of mobile technologies for learning was not explicitly named in the instructional strategies study, we are adding it to this list. A goal of implementing distance or blended learning into adult education programming is to extend the time and space where teaching and learning can occur. This goal suggests that success will be boosted if learners are able to access learning materials on mobile devices, particularly for learners who live in rural areas and can only access online content that can be accessed offline, through apps.

Tyton Partners (2016) research on technology in adult education found that learners lack access to home computers and the Internet but often do have access to smartphones. They estimate “55%–75% of the 4.1 million adult education students in programs today have smartphones” (p. 17). Similarly, a recent Pew Research Center report, [Home Broadband 2015](#), shows that while home

Keeping up with the pace of change

At the heart of sustainable change is developing and helping people to build up an “inner resilience” that guards them from experiencing every change that comes their way as disruptive. Instead, this resilience ensures that they learn to cope with these changes ... recognizing patterns in one situation and making sense of them and applying them in another. (Kop et al., 2011)

broadband adoption has plateaued and even declined somewhat, the number of Americans who use a smartphone to access the Internet at home is on the rise.

[Cell-Ed](#) is an example of content developed specifically for use on standard cell phones. [Cell-Ed's course catalog](#) offers a range of learning content that could be used either as a stand-alone distance class or as a complement to classroom learning in English language learning, literacy, citizenship, or Spanish literacy. [USALearns](#) is available as an app providing a full curriculum for English language learners, and applications like the vocabulary builder, [Quizlet](#), can be used to integrate mobile options into a learner's experience. For example, a teacher might use Quizlet as part of a blended learning course by uploading vocabulary images supporting a class reading to Quizlet Plus flash cards to accelerate mastery of vocabulary while out of class.



Though many major online curricula developers, like [Aztec](#), are working toward becoming more mobile friendly, you cannot assume that all websites and online resources developed for educational purposes will work on a tablet or smartphone. These curricula were initially built to work best when accessed on a laptop or desktop computer. For example, Edmodo has an app, but the quizzes are available on the version meant to be completed on a computer. Similarly, watch out for resources that were made using the software Flash, since they will not play on most mobile devices, and it is a challenge to download software that might make it possible. In addition, as you consider platforms for delivering content, be sure to search for an LMS or Course Management System (CMS) that was either developed for deployment on mobile, like [Kedzoh](#), or is at least mobile compatible (e.g., Moodle and Schoology).

In addition to finding appropriate educational mobile resources and platforms, you can use apps developed for other purposes for instructional activities in mobile learning, for example, [WhatsApp](#). This mobile messaging app does not require a student to have a telephone and texting plan. Because it works on wifi accessed in a public place, students need only have a mobile device. Teachers can create groups to coordinate cohort learning and send media-rich messages including images, video, and audio.

Ultimately, in order to take advantage of the technology literally in the palm of a learner's hand, it takes careful planning to leverage the strengths of the device and compatible resources. It may take some time and experimentation to develop an awareness of where and how to do this. Listen to the EdTech Center's webinar [Learning on the Go with Mobile Devices](#) for effective practices used by adult educators use who use cellphones (both basic and smart) and other mobile devices to provide access to education to their adult learners, improve learning in classes, and develop self-directed lifelong learners.

Documenting Progress

Whether you are engaging learners in a blended model or in supported distance learning, you will need to keep track of learner progress toward the goals they set in your orientation session. Some adult education programs rely heavily on the reports available in their core curriculum, which often report things like student progress, percentage of correct on quizzes and activities, percentage of assignments done, and time spent on tasks. The reports are a great way to measure progress with the learning activities included in the curriculum. These same reports are also available if a teacher has designed a course using an LMS like Moodle or Schoology.

There are other important markers of progress that need to be attended to that are likely not reportable in a core curriculum or LMS, such as the following:

- NRS testing dates and results
- Date and amount of time spent doing in-person instruction
- When and how communication has occurred
- Learner work in supplemental online activities
- Enrollment in classroom learning
- Proxy hours earned

Using a database to track progress

Before we started using FileMaker Pro, we had no idea how much time each teacher was spending with distance learners. Now we have several years' worth of data and better understand how to adequately staff our distance program and which support and communication strategies tend to lead to completion of activities.

~ a teacher in Minnesota

Data like this informs how much teacher time is required to support each learner and the impact of that time spent, both in terms of learner progress and in proxy hour accumulation¹⁰. IDEAL member states have different ways of accomplishing this. For smaller programs, a simple Excel spreadsheet could be used. If you work in a program with several collaborating teachers supporting distance education, you might consider using a Google spreadsheet that you work on together. Large programs tend to rely on more robust data applications, like Filemaker Pro, Microsoft Access, or custom-developed databases that link to or are a part of the state's NRS database. No matter the tool or structure of your tracking, be sure to figure out a way to make progress visible to the learner. Such awareness can support further persistence and engagement.

Digital Badges

One way to mark learner progress is through using digital badging. These online micro-credentials are a way to display and document skills learned both in and out of the classroom. Once a task is completed, a learner is awarded a digital badge,



¹⁰ Proxy contact hours are the equivalent of the time required for covering similar content if instruction had occurred in a classroom. ABE programs that rely on federal or state funding often need to report contact hours to support funding requests for subsequent years. This issue will be covered in Chapter 6, Assessment.

which can be included in a student portfolio to show mastery or a skill to employers or postsecondary education institutions.

There are several ways that distance teachers have been using digital badges.

- Online websites such as [Credly](#), [Classbadges](#), and [Bloomboard](#) allow teachers to easily design digital badges and distribute them to students. Teachers can also keep track of who has earned what badges.
- Several learning management systems (LMS) offer a built-in badge feature where teachers can set the milestones and students are then awarded a digital badge through the LMS once that goal has been achieved.

If you are not using an LMS that supports badging, but your organization has access to and the expertise available to make use of web server, you can use the Mozilla Foundation's [Open Badges](#) Infrastructure (OBI) to coordinate your badging. OBI is a system for issuing, collecting, and displaying badges earned on multiple instructional websites. Badge issuers, for example, the Northstar Digital Literacy Assessment, register a learning opportunity, linking it to the online badging system (the OBI). Once a task is completed, a learner is awarded a badge, which is then stored in his or her secure [Badge Backpack](#). ([See an example of a backpack collection for the Northstar Digital Literacy Assessment.](#)) The backpack is really a web page that serves as a transportable badge portfolio to be shared with employers or other stakeholders who need to know a learner's skills and experience.¹¹ This process will likely require the support of a software developer or systems expert to set up, but once it is set up it functions very smoothly.

Acknowledging accomplishments using digital badges

I started using digital badges as a way to reward outstanding performances by my students. I've been surprised by how much they appreciate something that takes me about 5 minutes to do! I now also use them to celebrate things like mastering fractions or reaching so many hours of study.

~ a teacher in Pennsylvania

Concluding Thoughts

This is likely the longest and most significant chapter in this handbook. We have tried to summarize some key characteristics of successful instruction in distance and blended learning. If you feel like you have more to learn, you are in good company! There are entire books on the topics covered here. In fact, in *IDEAL 102* we go further into instructional issues. To get the most from what you have read here,

¹¹ <http://openbadges.org>, <http://www.edweek.org/dd/articles/2012/06/13/03badges.h05.html>

go back and try to read some of the reports linked in the chapter. Watch the videos. Do your own research! To avoid feeling completely overwhelmed, choose the instructional characteristic that seems most doable in your teaching context and experiment. Learn by doing. Use the activities below to help you get started.

**Activity 5.1 Teaching Tasks. Reflect and document how you will structure your instruction.**

Describe your plans for achieving different teaching tasks in either or both supported distance and blended learning. Consider including the following information: activities supporting teacher involvement, learning content and technology required, and strategies for communication with your students.

**Activity 5.2 Monitoring Learning in Online Curricula. Decide how you will monitor learner progress in your chosen curricula.**

Find resources at your agency, through online search, or from the curriculum publisher to see how student progress is reported. If student data is available to you within the online curriculum, how would you use it to respond to student progress (or lack of progress)? What feedback would you provide the student? What might indicate a student's need for additional instruction?

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

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Chapter 6

Assessment: Student Participation and Progress

Assessment is an important part of both face-to-face and distance education. Adult basic educators use assessment for several reasons: to determine an appropriate placement for a student before instruction begins, to gauge learner progress in the course of an instructional sequence, and to measure how well a program of instruction is working. Determining placement and measures of program effectiveness are often accomplished using standardized tests (e.g. TABE, CASAS, and BEST Plus). Gauging learner progress can be accomplished by using a combination of formative and summative assessment strategies.

Assessment to Gauge Student Progress and Guide Instruction

Assessing student work on a regular basis provides both the teacher and the student with a sense of the student's progress, indicates strengths and areas for improvement, and helps the teacher plan appropriately to meet the student's needs. This formative assessment is part of the process of a learning sequence (Bakerson, Trottier, & Mansfield, 2016; Popham, 2011). It is valuable for students, as it provides a mechanism through which they can gauge their progress toward meeting goals. For teachers, formative assessment provides guidance for instructional planning.



Classroom teachers have a variety of formative and summative methods they can use to assess students' performance: homework and class assignments, discussions with students, the questions a student raises in class, students' body language, unit quizzes and tests, and so on. Distance teachers can also assess students' progress, but may need to use different tools and technology than a classroom teacher. Thus, one of the key tasks for distance teachers is to develop ways of obtaining the information they need to conduct assessment of student progress on a regular basis. Collecting this information is part of the learning sequence; it involves determining when, what, and how to test and making instructional choices based on results (Popham, 2011). Teachers in a blended learning class will want to include formative and summative assessments in both the face-to-face and online portions of

the class. The following section includes examples of assessment methods and how they can be used in a distance education and/or blending learning environment.

Reviewing Student Online Work

One way for teachers to assess student progress is to regularly review the work the student completes and provide feedback to the student on that work. Another option would be using tests and quizzes to assess distance students; this may make distance assessment more parallel to classroom-based assessment. These quizzes could be completed using online websites, posted in a learning management system, or emailed to the student. Since the primary focus of these quizzes is to gain information to help the teacher in instructional planning, issues about secure testing sites, which are a concern for accountability purposes, are less relevant. Teachers must assume students are acting independently to complete assessments.

The majority of curricula being used by IDEAL Consortium member states offer some form of tailored assessment (e.g., diagnostic instruments, unit quizzes or tests) designed to help teachers and students gauge student progress. Teachers can use these to gauge overall understanding of a specific topic as well as to identify specific skills where students may need additional instruction. While these product-tailored assessment measures are not accepted for accountability purposes, they can be valuable tools in monitoring student progress.

- Comparing the pre- and post-test scores generated by the curriculum products
- Requiring students to return to the agency either to have work reviewed or to take a quiz
- Online tests (either those associated with the curriculum or those created by the teacher using something like quizlet.com or by a third party site found by conducting a web search).

Culminating Activity

Teachers may also have students work on a culminating activity to show mastery of skill.

- Culminating activities may include participation in online discussion, longer writing assignments, presentations, or projects.
- Students can submit these materials via email, a learning management system, or a website.
- Presentations could also be given using online collaboration tools such as webinars or video conferencing. In a blended learning scenario with a learning cohort, use of these collaboration tools can support group or collaborative activities where it will also be possible to assess interactional skills and participation (Herr et al., 2015).

Portfolios

Students and teachers can maintain a portfolio of student work to track and demonstrate progress. Although portfolios do not meet National Reporting System requirements, they can provide additional

evaluation information to guide instruction. In a blended learning scenario, integration of portfolios can provide the means to extend classroom-based learning to out-of-class or online work.

These portfolios could include:

- Samples of student work, completed culminating activities and projects, and self-reflection tools such as inventories, checklists, or logs
- Performance-based products, such as a resume or performance in a mock interview (particularly for students studying work-based curricula)

Using a portfolio in blended learning

I teach in a blended Vocational ESL writing class and use Weebly as a digital portfolio for learners. Not only can I easily monitor progress by looking at the Weebly posts, but my learners can look back, see their improvement, and use old work to help with new activities.

~ an adult ESL teacher in California

Interaction with students

Distance teachers often meet with distance students using the telephone or online tools, like Skype or Google Hangouts, for consultations where they review work and ask students questions to assess their understanding of concepts. These meetings may also be held in person for blended students.

Progress checklists

Skills checklists can show a student's progress while in the program. Skills checklists may be part of a goal plan or a standalone tool used by teachers and students to document skills attainment.

Documenting student progress can support persistence by changing a student's beliefs about their capabilities and achievements (World Education, 2013). A visual representation of learned skills can build students' self-confidence and self-efficacy in terms of their ability to learn and be successful in education. This change in how students view their abilities can have a profound effect on their persistence in the program and achievement.

Additional Assessment Measures

In addition to the ideas presented above, IDEAL Consortium states have suggested several possibilities for ongoing or interim assessment of distance student progress, including:

- High school equivalency practice tests (HiSET, GED®, TASC)
- Passing individual sections of high school equivalency tests

Assessment to Meet the NRS Guidelines

The U.S. Department of Education’s Office of Career, Technical, and Adult Education’s (OCTAE) [2016 National Reporting System \(NRS\) Implementation Guidelines](#) state that distance learners can be included in the NRS, as long as states have an approved distance learning policy in their state's adult education plan. OCTAE first announced this option in 2007 and since then many states and local agencies have included distance learners in their NRS reports. In order to be included in the NRS, distance learners must be assessed according to the same policy that is in place for all adult learners in the state. Whether students are working completely at a distance or in a blended learning class, standardized assessments reported in the NRS must always be administered in a face-to-face, proctored setting. Your state will provide guidance on how to report distance learners. The following discussion of NRS requirements is intended only to provide some general background information; refer to the appropriate NRS and OCTAE documents for specific details.

States must include the following information about assessment in their distance learning policy:

- The test(s) that can be used to assess distance learners
- How, where and by whom tests may be administered
- The methods used to determine when to posttest distance students.

The NRS Implementation Guidelines state that distance learners “should be posttested after the same amount of instructional time as other students, according to the state’s approved NRS assessment policy” (p. 23). Assessment must be done using a standardized test identified in the state’s assessment policy and must take place in a secure, monitored setting. This does not mean, however, that the assessment must occur at the adult education center. Some adult education agencies have made arrangements with local public schools or libraries and trained staff there to administer and proctor testing for distance learning students living in those communities. A few teachers travel to remote locations to administer the assessments.

Measuring Instructional Time for Distance Learners

Contact Hours

How do you measure instructional time for distance learners? In a classroom, the most commonly used approach is to record “contact hours,” the amount of time a student is physically present in orientation, the classroom, the lab, and so on. This figure determines when a learner becomes an enrolled student

(at 12 hours) and when assessment of educational functioning level should be administered (frequently after 40 or 50 hours). Contact hours can also be counted for distance learners, but these hours extend beyond times when a student is physically present.

OCTAE's 2016 NRS Implementation Guidelines state "contact hours for distance learners can be a combination of actual (face-to-face) contact and contact through telephone, video, teleconference or online communication, where student and program staff can interact and through which learner identity is verifiable" (p. 48). This allows distance education programs to count contact hours for times when a distance teacher provides instruction using the telephone, webinars, video chat technologies, or interaction in the assigned distance learning curriculum "where student and program staff can interact and through which learner identity is verifiable" (p. 48).

Proxy Contact Hours

In addition to measuring contact hours, states have the option to report proxy contact hours for distance learners. Proxy contact hours provide an indication of how much instructional time, on average, distance students are likely to spend on specific distance learning activities. From an assessment perspective, proxy contact hours serve the same functions as contact hours: they allow adult education providers to determine when to posttest students. They also provide instructors with another way of monitoring their student's engagement with the curriculum and help instructors determine where additional support or intervention might be warranted.

Proxy contact hours are assigned using a systematic process. Your state will provide guidance on what proxy contact hours (if any) you will use for your distance learners: this is not typically a decision that individual teachers or adult education centers make. For NRS purposes, the following three models of determining proxy contact hours are acceptable:

- **Clock Time Model**—This model can be used with online or standalone software programs that track the time that a student is engaged with the curriculum and which log out students after a predetermined period of inactivity. Typically, one hour of time in the program is accepted to be one proxy contact hour.
- **Teacher Verification Model**—This model is well suited to multimedia curricula, where students receive instruction from a variety of sources, or with distance activities developed by the instructor. In this model, a fixed number of proxy contact hours are given for completion of each instructional activity in the curriculum. The assignment of hours is based on a teacher verifying that the assignment was completed.
- **Learner Mastery Model**—In this model, the degree to which learners have mastered instructional content is connected to the assignment of proxy contact hours. The Learner Mastery Model assigns a fixed number of proxy contact hours based on the learner passing a test on the content of each lesson. Students must score at a predetermined level (typically 70%–80%) to earn the credit hours attached to the material.

States are *not* required to report proxy contact hours to the NRS. However, if proxy contact hours are reported, they must be used to determine when it is appropriate to posttest students. States that do not use proxy hours must provide information in their distance learning policy that explains how they will make decisions about appropriate posttesting intervals.

Posttesting Students

Getting students to come back to the adult education center for posttesting is one the major challenges facing distance teachers. Students may find it difficult to create time in their schedule to meet this requirement, have difficulty in getting to the program, may fail to see the importance of testing, or may be unwilling to meet face-to-face when the majority of their studies occur independently at a distance. Yet posttesting is important both for monitoring student progress to guide instruction and for accountability purposes. Teachers in IDEAL Consortium states report that they have used the following approaches to encourage students to return for posttesting:

Posttesting students

Our state requires students to return to an adult education class and take a posttest in at least one subject every three months. First, we remind students to go in and take a posttest. We point out how valuable this is to us and them. Then if they do not respond or go in and take a posttest, we “block” them from the class until they go in and take a posttest. If they have a good reason for not posttesting right away, I will give them some extra time.

~ a teacher in Missouri

- **Using incentives.** Teachers have used incentives ranging from gas cards, pizza parties, and raffles to bring students back for testing. Others find that certificates or other tangible forms of recognition may motivate students to posttest.
- **Setting expectations for posttesting at orientation and reminding students of this as they study.** This may help students perceive this as an integral part of their distance education program. Some teachers also stress that this allows the teacher to more effectively focus instruction to best meet the students’ needs.
- **Explain how posttesting shows the student and teacher progress that has been made and areas of improvement.** Some teachers have found that students are more willing to take a posttest if they understand the value of the assessment. By taking the time to explain how the posttest benefits students by allowing them to quantifiably see progress and identify areas for improvement, students may be more willing to make the effort to posttest and do their best on the assessment.
- **Appealing to students’ sense of responsibility.** Some teachers explain to their students that in order for the agency to be able to continue to offer free services, they need to have information on student’s progress. They encourage students to come in for testing so that the program will be available not only for them, but also for others who might need similar services.
- **Offer posttesting in locations that are convenient for the students.** Some agencies have established with local libraries or schools located in the students’ communities to conduct

posttesting. A few teachers have reported that they will drive to the students' communities to administer posttests

- **As a last resort, block students from the distance program until they posttest.**

Considering Your Assessment Strategies



Activity 6.1 Assessment to Gauge Learner Progress and Guide Instruction. Plan how you will use the different assessment strategies described in this chapter.

Of the strategies listed above, which will you use and how will you implement them? If you are a practitioner new to distance or blended instruction but working in a program with an established program, be sure to first consider what is currently happening in your distance education program.



Activity 6.2 Assessment for NRS Reporting. Articulate how you will fulfill NRS testing and reporting requirement for your distance education program.

You will first need to review your state's distance education policy and assessment policy. Then, describe how you will handle assessment for NRS reporting of your distance and blended learning students and your plan for posttesting distance students. If you are a practitioner new to distance or blended instruction but working in a program with an established program, be sure to first consider what is currently happening in your distance education program.

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

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Chapter 7

Administrative Issues: Getting Started¹²

Experiments in IDEAL Consortium states have revealed a number of key issues related to the implementation of distance education programs for adult learners. These provide both new opportunities and new challenges for administrators at adult education agencies. In surveys administrators report that, in general, the benefits of distance education outweigh the drawbacks and challenges of implementation. This chapter discusses issues administrators should consider as they embark on adding a distance education component to their agency's continuum of services. These include:

- Distance education as a pilot activity
- Setting a vision and establishing goals for the distance education program
- Organizing the distance education program
- Creating an environment that encourages experimentation
- Identifying and supporting distance teachers
- Monitoring achievement and evaluation of the pilot distance education program
- Moving beyond the pilot and implementing distance education into program services
- Connecting distance education with Workforce Innovation and Opportunity Act (WIOA) outcomes

Distance Education as a Pilot Activity

The EdTech Center encourages states and programs to consider their first attempts at implementing distance learning programs for adult education students as a pilot activity.

¹² Based on the work of Dehra Shafer in the 4th Edition

Pilot activities are experimental in nature and allow an agency the opportunity to explore a new approach on a small scale. They leave room for trial and error and encourage people to move in new directions. Pilot activities are distinct from the more established programs offered by an agency, although if they succeed, they may become incorporated into the agency's regular course offerings. As noted earlier in this Handbook, teaching at a distance is dramatically different from teaching in a classroom. Agencies will need to experiment to learn what works best for their staff and students.

A key thing to remember is to start small. Start by figuring out how to expand services to one group of adult learners by offering a distance education program. Many programs begin by offering a blended learning option to one class. This allows the teacher and students to develop a comfort level with distance education while still meeting for face-to-face instruction.

Pilot activities should help agencies determine both *whether* distance education is a viable option for targeted learners and, if so, *how* agencies can best facilitate their distance education program. Distance education may work better for some agencies than for others, just as distance learning is better suited for some learners than for others.

Setting a Vision and Developing a Plan



Setting a vision and developing a realistic plan with timelines for the distance education program can create buy-in from program staff as well as alleviate concerns that may arise when trying something new. Many program administrators have found it helpful to develop the distance education vision and plan with a team of stakeholders. This ensures that multiple perspectives are considered and empowers program staff in the planning process. Some possible questions to consider when setting a vision and developing a plan include:

- What is the vision behind adding a distance education program? Do you want to reach new learners, increase the intensity of instruction by offering a blended model, improve students' technology skills, prevent students from dropping out from the program when they can no longer attend face-to-face instruction, improve outcomes, or a combination of these areas?
- How can the distance education program build on your program's strengths? How can it support achieving funders' expectations such as the Workforce Innovation and Opportunities Act (WIOA) performance standards?
- How can leadership for the distance education program be shared?

- What is a reasonable timeline for implementing the distance education program? Since this is a new initiative, what are the goals for the pilot? What are the expectations at the end of the pilot?

Organizing the Distance Education Program

Each state and/or agency must choose the distance learning model(s) (as described in the Setting the Stage chapter), instructional materials, and the technology to deliver distance education that will best meet the needs of its learners. In order to meet the Office of Career, Technical and Adult Education (OCTAE) guidelines and the National Reporting System (NRS) requirements for assessing students, all distance learning programs will have a face-to-face component. The amount of face-to-face interaction that is required after the initial requirements are met may vary widely. Some programs chose to offer a blended distance education program where face-to-face instruction and online learning are combined to increase the intensity of instruction for students. Other distance programs may have the majority of the instruction occurring online using asynchronous tools like online curriculum and activities and/or synchronous instruction using webinar or video chat software. The format of your program will depend on the learners and their goals and the vision and goals for your program. The EdTech Center can provide technical assistance to help states and/or programs explore what distance education model best fits the program and learners' needs.

A second decision involves selecting instructional materials. Many programs choose to use a publisher-developed curriculum when first beginning a distance program as their core instructional resource. Teachers can then identify or create supplemental activities to fill in gaps and further address skills. Your state will provide guidance on what curricular options are available for teaching at a distance. As noted earlier, in order to count distance learners in the NRS, states must submit a Distance Learning Policy to OCTAE. The acceptable curricula for distance learning must be specified in the state policy.

A third consideration involves exploring the ways technology can support the expansion of services and what type of technology to use. Technology can be used to reach more learners as well as to motivate them, provide greater instructional flexibility, and increase resources for teaching and learning. Programs should consider what technology students have access to and what technology skills they need for their future employment and postsecondary education goals. For example, smartphone ownership is becoming more prevalent for all demographics (Pew Research Center, 2015). Some students may go online only using a smartphone or tablet because they don't own a computer. There are also programs, such as EveryoneOn, that provide free or low-cost access to computers and high-speed Internet for adult learners. One of the goals of distance education is to provide easier access, so the technology selected should not itself become a barrier to access.

Once a model has been selected and instructional materials and technology decisions have been made, planning should be completed in the five areas discussed throughout this Handbook: (1) recruitment, (2) screening for appropriate learners, (3) orientation for learners, (4) teaching at a distance, and (5) assessment of distance learners. In the final activity in the EdTech Center's online course, *IDEAL 101*, each agency completes a Distance Education and Blended Learning Site Plan for its distance or blended learning pilot. It is strongly recommended that a staff team, composed of the administrator and two teachers, complete it. Developing this plan as a team has several advantages:

- All parties involved in the distance education pilot programs have the opportunity to participate in the design and development of the experimental program. This not only brings a broader range of expertise to bear on program development, it also helps all participants feel a sense of ownership for the pilot.
- Team planning provides administrators with a fuller understanding of what the teachers in their agencies will be doing and the types of supports they will need.
- Developing the plan as a team helps create a cohesive, experimental mindset.

Creating an Environment that Encourages Experimentation

Pilot programs are most effective if the participants—that is, the agencies, administrators, and teachers implementing them—perceive themselves to be innovators and experimenters. To do this, participants must be willing to try new approaches, take risks, and think creatively. For many educators, this involves developing a new mindset and acting outside the established norms of the field, which can be challenging in today's accountability driven climate. The



administrator at each agency, in conjunction with people at the state and federal levels, must create an environment in which distance educators are comfortable with the risk taking and creative thinking that accompanies all innovations. Some possible ways to create this environment include:

- Remind participants, *over and over again*, of the experimental nature of the project. This is a novel idea for many participants, and it may take time for them to accept the message.
- Stress that the goal of the project is to accumulate knowledge about both what *does* work and what *does not* work. Help participants understand that in pilot projects, as much is learned from

apparent failures as from apparent successes. Encourage participants to try new and creative ideas rather than limiting themselves to strategies they already know.

- In the initial phase of a project, do not define success in terms of serving a set number of students or other quantifiable measure. Define success as learning more about the approaches that worked as well as those that were problematic.
 - Expect that it will take time for participants to accept that an administrator is serious about the experimental nature of this project. For example, it took 3–4 months before Pennsylvania pilot sites were willing to share with others the problems they experienced and the approaches that did not work. It took time for experimenters to fully grasp that the focus was on accumulating knowledge and that their efforts to try new things were among the most highly valued components of the project.
 - Provide opportunities for teachers to interact with others to share ideas, solve problems, and support each other's efforts. This might be accomplished through regular meetings, conference calls, or webinars.
-

Identifying and Supporting Teachers

Identifying Teachers

Teaching at a distance requires teaching skills that are different from classroom teaching skills. (See Appendices D and E for resources to measure teacher readiness.) Some excellent classroom teachers make the transition well, while others are not comfortable in this new environment. Successful distance teachers are innovative, creative, and flexible. They are open to new experiences, are willing to explore multiple pathways to reach an end point, and bring new ideas of how to meet students' needs to their work. Successful distance teachers need to be technologically adept, knowledgeable about the curriculum, and able to establish rapport with their students at a distance. It also helps if teachers are excited about the opportunity for professional growth and about what distance learning can offer their students. Teachers often find themselves working with independent, individual learners and need to adopt a "learner-centered" approach to teaching—if that is not already their preferred teaching style.

Thus, just as distance learning is not for every student, distance teaching is not for every teacher. Whenever possible, teachers should be asked to volunteer or be allowed to self-select to try distance or blended teaching; this increases the likelihood that the teachers will bring the constellation of characteristics described above. A teacher with no distance experience and little interest in innovative educational practices is not likely to be successful. Because distance and classroom teaching are so different, distance teachers need additional training and openness to new educational approaches if they are to be successful.

Supporting Teachers

Administrators need to understand and be prepared to support the additional responsibilities that teachers will assume as well as prepare teachers for the new roles they will fill when teaching at a distance. Data from teacher time studies in several states indicate that, at the start of a distance education pilot program, only about half of teachers' time is spent actually teaching; the other half is devoted to the activities necessary to recruit learners, develop partnerships with other agencies, orient new distance students, and plan for new ways of interacting with and motivating learners. Many of these activities—particularly recruitment—are not typically a part of a classroom teacher's job, but they tend to fall to the distance teachers in pilot programs.



In addition, teachers in pilot programs assume a dual role: they are teachers but they are also researchers collecting data about the pilot program. Teachers are often required to complete forms, keep records, and collect data to provide insight into program implementation and effectiveness. Teachers need to understand the reasons for the data collection, feel confident using the data collection tools, and appreciate the importance of their role as experimenters. This data collection can be time

consuming and needs to be figured into teachers' time allocations. If both teachers and administrators are aware of these additional roles, it will help all participants appreciate the time demands the program places upon staff.

It is also important that teachers be knowledgeable about the technology needed to teach at a distance or in blended learning classes. Because many distance programs have an online or computer-based component, distance teachers need to be technologically savvy. They must not only understand how to use the delivery modality of their curriculum, but also be able act as a technology support person to help students resolve their technical problems. Recognizing this need, you may wish to survey teacher technology competencies and agency technology capabilities as part of the selection process for pilot sites (See Appendix D.).

Professional Development for Teachers

Good teaching is at the heart of effective distance education for adult learners, and distance teachers need a variety of support mechanisms as they make the transition from classroom teaching to distance. Providing teachers with professional development, recognition for their efforts, financial compensation, and the opportunity to interact with peers teaching at a distance are among the many ways agencies can make this transition easier for teachers. IDEAL Consortium states recommend:

- **Providing professional development opportunities for teachers preparing to teach at a distance.** This Handbook provides an introduction to the main concerns and is a good starting

point, particularly when used in conjunction with *IDEAL 101*. Some states have developed their own training protocols for distance education, and commercial resources are available as well. See the [EdTech Center website](#) for professional development opportunities, such as webinars on blended and mobile learning. Regardless of the training approach and tools used, teachers will need additional training if they are to be as effective teaching at a distance as they are in the classroom.



- **Provide mentoring groups in which experienced distance teachers can support and guide new teachers.** This provides an opportunity for teachers to work together to address challenges and creates an environment that encourages professional growth. Missouri has an extensive, formally organized mentoring program for their distance educators. Teachers learn from the experiences of their colleagues and become part of an active community of practice.
- **Recognize that making the change from classroom teaching to distance teaching is a major transition for teachers.** Create an institutional climate that supports them in making this transition. Provide supports, such as conference calls, online chats, and websites for teachers where they can ask questions to help them think through the many issues they will encounter.
- **Understand that to teach effectively, teachers must be intimately familiar with the instructional resources.** Because distance education programs may be individualized, students can enter the program at any number of points. Thus, the teacher can't simply stay "one day ahead" of his/her class and be able to meet the students' needs. Provide curriculum training and planning time for teachers.
- **Provide financial compensation and/or release time from other duties for teachers working with experimental distance education programs.** Consider providing flexible working hours for distance teachers and compensation for the nontraditional hours they are likely to work. It is unreasonable to expect teachers to assume a task of this magnitude during the normal working day or on top of a full workload and be able to flourish as distance teachers.

Monitoring Achievement and Evaluation of the Pilot Program

In distance education and blended learning pilot programs, data plays a critical role. While data regarding enrollment, hours and instruction, and outcomes may not be the primary focus of the distance education pilot, they are still important measures to track. This quantitative data along with the qualitative reflections of the pilot staff can be useful for monitoring achievement and evaluating what worked and what can be improved.

In an ideal situation, states would release agencies from their customary accountability requirements for the first phase of any new pilot program. The authors believe that distance education for adult basic learners is so different from traditional classroom programs that it is equivalent to "reinventing the

school.” It requires that agencies look for different students and find new ways to teach and interact with them. It clearly takes an extended effort as well as a period of “trial and error” to determine best practices (Askov, Johnston, Petty & Young, 2003, p. 31).

For example, in some states, such as Pennsylvania, certain pilot sites were exempted from some of their usual accountability requirements to encourage experimentation. Sites were required to provide a count of the number of students their Workplace Essential Skills distance education programs served, but they did not need to provide evidence of educational gains or progress. This was important for several reasons. It further reinforced the pilot program’s experimental nature, encouraged sites to actively try new approaches, and allowed both the sites and the state a longer period of time to deal with the unique set of issues related to assessing distance education students.

Regardless of how the accountability of distance education pilot programs is measured, data monitoring is a key component of the pilot. Programs and states will want to determine what data will be collected and how often it will be reviewed. For example, Arizona Department of Education staff met with pilot programs twice a year to review student and program data as well as to discuss successes and challenges of the program pilot.

Administrators can work with the pilot team to determine how distance learners will be assessed. Administrators need to ensure that their agency’s assessment plans are aligned with those set out in the state distance learning policy. They will need to work closely with both state- and agency-level data staff to make sure that the appropriate information about distance learners can be captured in the data systems. Administrators will also need to train teachers about the assessment and data reporting policies and requirements.

The pilot team can also determine if any other data might be helpful. Some programs have had distance students participate in focus groups or complete surveys to provide additional feedback about the program.

Moving Beyond the Pilot

Pilot programs have a limited life span and at some point are likely to be replaced by a larger scale implementation of distance and blended learning. Although the growth of the distance education program clearly depends upon state policies and support, the local programs are where the changes are typically implemented. At the local level, the goal often becomes to provide distance learning as simply one of the available options for adult learners. A good place to begin is to create agency-wide awareness of the programs and how they can serve students. Many agencies find that it is helpful to combine the recruitment, screening, assessment, and orientation of distance students with those same functions for classroom students. This not only reduces the demands on distance teachers, but also serves to

legitimize distance learning within the agency. Developing agency recruiting materials that mention distance learning as an available option, training intake staff to identify students for whom distance learning might be a good fit, and supporting the professional development of teachers interested in distance education all help to integrate distance learning into the other agency activities and services.

Changes in the delivery of education are not going to be easy or swift. A popular misconception about distance education is that it can be implemented with little change in the way education in an agency is organized, the way teachers teach, or the way learners learn (Moore, 1993). Research on K–12 curriculum innovations, for example, suggests that, even with all the right conditions in place, it may take three to four years for teachers to adopt, adapt and reinvent how they teach (Askov et al., 2003; Hall & Hord, 1987). Therefore, adding distance education to an agency’s spectrum of services should be viewed as an “organizational change” effort. First and foremost, adding distance education as a delivery mode must be based on the educational principles and issues that form the foundation of any organizational decision. Such principles and issues often involve the culture and core values of the agency. Whether and how to include distance education is a decision that program administrators must make. Basing that decision on organizational values and philosophy will ensure that the decision is rooted in the mission of the organization and therefore will help make its addition to the organization a smoother transition that is more likely to succeed.

Experience in the IDEAL Consortium states suggests that the some of the following approaches may be useful to agencies moving from an experimental to a programmatic implementation of distance education:

- Capture the lessons learned during the pilot phase and use these as a basis for future planning. Keep the practices that worked well and drop those that did not. (See Appendix E for a detailed description of how to use webinars to reflect on different phases of the pilot.)
- Write down procedures that have evolved. This helps formalize the process and ensures that all participants have a shared understanding of the agency’s approach to distance education.
- Create an action plan with strategies to help participants move from the idea stage to the implementation stage.
- Write job descriptions for the key players. This may include teachers, agency administrators, technical support people, recruiters, and others involved in making the agency’s distance project a reality. Keep in mind that the nature of distance education may require some flexibility in job roles and in assignments.
- Get involved with people at the state level interested in distance education and make policy recommendations based upon participants’ experience.

Connecting Distance Education with Workforce Innovation and Opportunity Act (WIOA) Outcomes

The Workforce Innovation and Opportunity Act (WIOA) describes the performance outcomes for adult education programs that receive funding through this federal legislation. All workforce development and adult education partners funded through WIOA share the same performance outcomes: job attainment, job retention, average earnings, secondary school and postsecondary credentials attainment, measurable skill gain, and effectiveness in serving employers. Distance education is one service that programs can use to meet these performance outcomes.

Distance education can lead to improved outcomes by:

- Increasing student persistence and preventing student stop-out
 - Increasing skill attainment necessary for work and postsecondary education
 - Modeling technology and independent work skills needed for the workplace and postsecondary education
 - Incorporating academic skills with a training program to offer an Integrated Education and Training (IET) model
 - Customizing instruction to provide sector-specific activities that prepare students for the workplace
-

Support for Distance Education and Blended Learning

The Ed Tech Center is available to provide support to you and your program staff as you pilot distance education and work to integrate it into your program services.

Administrative Considerations and Strategies



Activity 7.1 *Administrative Support for distance education and Blended Learning.*
Document the strategies you will use to build and sustain your program.

Whether you are an administrator new to running a distance program or coordinating blended instruction, or working to strengthen a current program you need to be thoughtful about your approach. Make a list of the most useful strategies listed above that you will use in your pilot.

Note that in the course, *IDEAL 101: Foundations of Distance Education and Blended Learning*, these prompts are expanded into fully developed collaborative activities for your team to complete together. You can link to them on the course website.

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Appendices

On the following pages are a number of resources to assist you in developing your plans for recruiting and teaching adults to study online.

- **Appendix A:** Learner Intake Survey: Is Online Learning for Me?
- **Appendix B:** Tips for Teaching Distance or Blended Learning
- **Appendix C:** Description of an Effective Distance Teacher
- **Appendix D:** Computer Skills Assessment for Teachers
- **Appendix E:** Using Webinars in Distance Learning Pilots

Appendix A

Sample Learner Intake Survey

Many IDEAL programs use a survey as a counseling tool when screening prospective distance learners. Since blended learning most often includes similar aspects it could be adapted for its use. A learner completes the survey in a face-to-face setting, discussing the answers with the counselor. In the following example a “c” answer favors the person doing well in distance study; the “a” answer suggests the student would do better in a classroom situation. You can use a paper copy of this survey or build it into a web-based tool like Google Forms or Survey Monkey.

1. At home, I have a quiet place where I can study for this course:
 - a. No, a quiet place is not often available
 - b. Sometimes available
 - c. Always available
2. I am someone who:
 - a. Waits until the last minute
 - b. Needs reminding to get things done on time
 - c. Often gets things done ahead of time
3. When I think about all the things I do in a typical week (e.g., work, family, and social activities), the amount of time I have each week for online learning is:
 - a. Less than 5 hours
 - b. 5–9 hours
 - c. 10 hours or more
4. In my daily life, there is a lot of routine (for example, getting kids to school, going to work, and taking part in community or church activities):
 - a. Not at all true
 - b. Sometimes true
 - c. Very true
5. I have access to the technology (computer, tablet, smartphone, etc.) I will need for this course:
 - a. I'm not sure where I will find the technology I need for the course
 - b. Easily available, but not at my home
 - c. At my home
6. When I am asked to use a computer:
 - a. I wait to use it until later.
 - b. I feel a little nervous, but use it anyway or find someone to show me how to use it.
 - c. I look forward to using it.
7. Feeling that I am part of a class is:
 - a. Very important to me
 - b. Somewhat important to me
 - c. Not particularly important to me

8. Discussions in a class are:
 - a. Very useful to me. I almost always participate in class discussions.
 - b. Somewhat useful to me. I sometimes participate in class discussions.
 - c. Not very useful to me. I don't usually participate in class discussions.
9. When an instructor gives directions for an assignment, I prefer to:
 - a. Have the directions explained to me
 - b. Try to follow the directions on my own, then ask for help when I need it
 - c. Figure out the instructions myself
10. When I have a reading assignment for class or for work, I think of my reading skills as:
 - a. Lower than average. I usually need help to understand the text.
 - b. Average. I sometimes need help to understand the text.
 - c. Good. I usually understand the text without help.
11. When I have a writing assignment for class or work, I think of my writing skills as:
 - a. Weak. I find it hard to express myself in writing.
 - b. Average. I can express myself fairly well in writing, but sometimes have difficulty.
 - c. Good. I am comfortable expressing myself in writing.
12. Face-to-face interaction with my instructors and other students is:
 - a. A very important part of my educational experience
 - b. A somewhat important part of my educational experience
 - c. Not important to my educational experience

Appendix B

Tips for Teaching at a Distance

Below are some tips for distance teaching with adult learners.

1. **Be prepared.**

- Know your materials.
- Study the online procedures as a student. Register and learn!
- Prepare a method of recording information.

2. **Be patient, firm, and forgiving.**

Students will need to learn the following things, all at once, all online!

Typing	History	Reading	Organization	Email
Math	Communicating	Testing	Internet	Science
Spelling	Navigating	Websites	Grammar	Self-motivation

3. **Try to really understand the reasons why the learner is studying online.**

4. **Don't judge a person by his/her writing in an email or text message.**

5. **Develop an online persona.**

- Personality: Match their speed, expectations and rhythm.
- Sense of humor: Remember humor can be difficult to interpret without seeing facial expression, body language, and knowing the person well.
- Sixth sense: What do they mean by that?
- Educational presence: You get what you pay for.

6. **Respond quickly and frequently.**

- Response time: What can students expect from you? 1 or 2 business days? Consider texting students for quick check-ins or to schedule a meeting time.
- Form letters and emails: Use BCC to send updates to multiple students at once.
- Form answers or an FAQ page for frequent questions, site problems, and so on.

7. **Respond appropriately.**

- Watch terms and expressions.
- Never promise something you cannot deliver.
- Protect anonymity.
- Don't take it personally.
- Keep responses nonpolitical, nonreligious, and nonjudgmental.

8. Collect Necessary Information.

- Send a warm welcome email or video introduction immediately, asking about their current situation, educational background, goals, email address, and computer experience.
- Send Friday Progress Reports that they can just check and email back.
- Use multiple-recipient emails with discretion. Students prefer their anonymity. Send each email separately or use BCC unless they know they are part of a class.
- Keep a file of individual email correspondence for quick reference.

9. Motivate and encourage.

- Offer certificates for completed sections.
- Send praise, ecards, congratulations, digital badges.
- Ask opinions.
- Ask for help.
- Stay on top of regional happenings to mention in your correspondence.

10. Handle duplicate responses.

- Create a website, community, or Word/email document for posting and sending resources, references, duplicate questions, and problems on website affecting everyone

11. Set educational expectations.

- Response Time: Set expectations for teachers and student responses.
- Work in grammar and spelling gradually.
- Continually challenge.
- Use Open Educational Resources (OER).
- Ask about classes in their area, and offer to find an agency near them.
- Remind them often why they are doing this.

12. Keep yourself motivated, energized and enthused!

Appendix C



Outline of Suggested Skills for Minnesota ABE Distance Learning Teachers

General

- Highly digitally literate/competent, including confidence troubleshooting distance learning platforms, and preferably computer issues
- Data-minded and detail oriented; knowledge of or willingness to learn spreadsheet or basic database skills
- Experience/comfort with a diverse range of adult learners and English language learners
- Able to prioritize tasks
- Willingness to create, learn, and constantly adapt and improve systems
- Organizational skills

Specific to Distance Learning

- Understanding of basic premises informing distance learning in adult education (types of delivery models, best practices, etc.)
- Familiarity and compliance with state distance learning policy
- Understanding of basic digital literacy instruction and use by learners
- Understanding the type of learner for whom distance learning is appropriate and useful
- Working knowledge of distance learning in the following areas: Recruitment, Screening/Orientation, Instruction and Tools to Support Instruction, and Assessment and Reporting
- Ability to effectively address issues related to learner persistence and overcoming barriers
- Familiarity with distance learning platform(s) used
- Following distance learning naming conventions and data reporting requirements
- Developing (or using a previously developed) distance learning implementation plan
- Participation in distance learning professional development, ongoing

Highly Recommended: Completion of *IDEAL 101*

Appendix D

Technology Skills Assessment for Teachers¹³

This self-rating form is comprehensive and suitable for use to help teachers determine their own technology competencies. You may want to use the items here as a guide to develop your own checklist that focuses on the skills required by the particular distance education program you are offering.

1. Do you have a computer at your local program?
2. Does the computer at your program have Internet access?
3. Do you have access to other technology needed for the distance education program (smartphone, tablet, software, applications)?
4. Please indicate your knowledge level of each of the technology skills/tasks listed below. If additional training is needed, indicate that as well.

Technology Skill	Self Sufficient	Limited Knowledge	No Knowledge	Need Training
Start up and shut down a computer				
Open and close Windows (minimize and maximize)				
Work with the Taskbar				
Save a file to disk				
Create new folders				
Keyboarding skills				
Basic mouse navigation (clicking, right clicking and dragging, etc.)				
Cut/copy and paste				
Create an account that requires a username and password				
Log into websites that require a username and password				
Use Microsoft Word				
Insert media (video, screencasts, audio files)				
Create tables and graphs				
Create or format a document				
Create a spreadsheet				
Create a PowerPoint presentation				
Send and receive email messages				
Use Electronic list/Mailing list				
Download items from the Internet				

¹³ Updated from a previous version created by Kimberly McCoy (former Technology Projects Coordinator, Ohio Literacy Resource Center, Kent State University).

Technology Skill	Self Sufficient	Limited Knowledge	No Knowledge	Need Training
Attach documents to an email message				
Create an email address book				
Manage Bookmarks and/or Favorites				
Create a podcast				
Create a website/page				
Search the web				
Use chat features on a website				
Use different browsers for navigation on the Internet				
Use cloud-based collaboration apps: Google Drive or Dropbox				
Update software when prompted (Java, Adobe, etc.)				
Send and receive text messages				
Download and install apps on a mobile telephone				
Record audio and/or video on a mobile telephone				
Use video chat or webinar software				
Use social media to send messages and post media				
Complete assignments in a Learning Management System				
Participate in online discussion boards				

Appendix E

Using Webinars to Monitor Progress of Distance Learning Pilots

Conducting regular webinars with each of the distance learning sites in your state is a valuable component of distance learning experiments. These webinars can fill a variety of roles including:

- Provide ongoing updates about the process of implementing the distance education programs, including recruiting and orienting students, teaching, and working with the various curricula.
- Provide a forum in which teachers and administrators at the sites can share information and provide support for each other's efforts.
- Explore larger issues related to the goal of integrating distance education into a wider choice of adult education offerings.

There are a number of free webinar tools that you can use to run your meeting. If everyone involved has a Google account, you can use [Google Hangout](#). [Zoom](#) is very easy to use and allows you to very easily transfer presentation and screen sharing to other participants. You could also check with the agency that runs technical support or professional development for adult education in your state. They might have a license for Adobe Connect, WebEx or GoToMeeting, or other paid web conferencing software.

For webinars to serve these functions effectively, they need to be carefully planned and moderated. Structuring the webinars allows the moderator to keep the group “on task” and allows the participants to address all issues of concern. Two things are useful in this regard. One is to send an email a week ahead of the webinar asking for some information to help establish the agenda. The second is to circulate the agenda two days in advance of the webinar. The first email requesting information serves several purposes:

- It allows the moderator to be informed about the status of the sites and their concerns before the webinar. This allows the moderator to adjust the agenda, if needed, and guides the moderator in thinking about how to structure the webinar.
- It encourages sites to reflect on their progress and the issues they face in implementing and maintaining their distance learning projects.
- It provides the foundation for a brief, opening statement from each site on the webinar.

The template for information should be short, simple, and reflect the issues to be covered in a particular webinar. There is likely to be a considerable amount of repetition in the templates used over time (for example, most templates will ask sites to report on the number of students served, and many topics, such as recruitment methods, may be covered in multiple webinars). Examples of some templates requesting information are provided below.

Examples of Webinar Agenda

The following conference agenda templates were used for a series of four, monthly webinars conducted for a group of sites just beginning their distance program.

Site Summaries

A week before the webinar, each site was sent an email with a template to complete and return to the person who would be moderating the webinar.

Month 1: As of (date) we had ___ students in the program. To orient students to the curriculum and to being a distance learning student we.... The major strategies we are using to provide regular support to these learners are.... We would characterize our overall progress as.... We are trying to figure out how to solve the following problems...

Month 2: As of (date), we had ___ students in the program. The major strategies we are using to provide regular support to these learners are.... We would characterize student retention in the program as.... We are defining “dropouts” as students who.... The biggest issues for our site are....

Month 3: As of (date), we had ___ students enrolled in the program. We consider ___ to be active distance students. The major strategies we are using to provide regular support to these learners are... The two most difficult problems we are trying to solve are....

Month 4: In the final webinar of this phase of the project, we will look back at the project thus far. To help get the process started, please respond briefly to the following questions before the webinar:

- In what ways did this program work well for your target population?
- What changes would you make for next year’s project, and why?

Sample Moderator Guides for Conference Webinars

For each phase of the pilot there should be a webinar. For example, in month one you will focus on the first aspect of the pilot or site plan, recruitment. If you are moderating the webinar and read through each agency’s site plan, you may recall one agency who made a remarkable contribution to the way that recruitment could occur. Consider inviting such an agency to do a short presentation on the innovation during the webinar.

Month 1 Webinar

- Welcome, introductions of all on the webinar.
- Set out topics for discussion: recruitment (likely primary focus of first webinar), orientation, student access to Internet, distributing print materials to students. Any others important to participants?
- Recruitment
 - Ask each person to give a brief (1 min.) overview of what their site is doing to recruit students
 - Short presentation from an agency doing remarkable work
 - Look for common threads/concerns
 - How are you working with other agencies?
 - Talk about successes: what seems to be working in terms of recruiting?
 - Brainstorming on how to handle problems (if any) encountered at sites
- Other concerns raised by participants.
- Reminder of next scheduled webinar

Month 2 Webinar

- Set out topics for discussion: orientation, materials distribution, student support and feedback, what is and is not working for programs.
 - One person from each site gives a **brief** (1 min.) overview of the current status of their site (# of students enrolled, method of orientation, method of student support, overall sense of progress). Look for common threads/concerns.
- Screening and Orientation:
 - What are sites doing to make sure they have distance learning-ready students?
 - What are sites doing to orient students to both the online component and the idea of independent learning?
 - Does what you're doing differ from what you anticipated? If so, what prompted you to make changes?
 - How are you doing orientation for blended learning classes?
 - Short presentation from an agency doing remarkable work
- Share ideas about how sites are getting Internet access to students.
- Other concerns raised by participants
- Reminder of next scheduled webinar

Month 3 Webinar

- Set out topics for discussion: student support and feedback, retention, definition of “dropout,” issues sites are trying to resolve.
 - One person from each site gives a **brief** (1 min.) overview of the current status of their site (# of students enrolled, method(s) of student support, concerns about retention, overall sense of progress). Look for common threads/concerns.
- Involved Instruction: Describe what this looks like at your site.

- Complementary/supplemental instruction materials: What are you using? Are you using a learning management system (LMS) or class website to organize and distribute? How is it working?
- Student support and feedback:
 - How are you providing feedback and support to students? Does this differ from what you anticipated? If so, why were the changes necessary? What methods, if any, are more effective, and why? Does this differ for different students?
- Student retention:
 - How would you characterize retention of students? Does this differ from your other programs? If so, how? What are you doing to increase student retention? What do you see as the biggest obstacles to retaining students in the program?
- “Dropouts”
 - How is your site defining a “dropout?” How does this differ from your other programs? Do you have any recommendations on dealing with this issue?
- Major issues sites are addressing
- Other concerns raised by participants

Month 4 Webinar

- Set out topics for discussion.
 - One person from each site gives a **brief** (1 min.) overview of the current status of their site (# of students enrolled/active, method(s) of student support, concerns about retention, overall sense of progress). Look for common threads/concerns.
- Student attrition:
 - Have any of your students “dropped” from the program? How do you define a “dropout”? Although your program has only been running for 1–2 months, can you say how the dropout rate compares with your classroom-based programs? In the next month you will need to contact your “dropouts” to find out why they didn’t stay with the program. Will it be easy to contact them?
- Assessment: How are you measuring learner progress? Which of the assessment strategies laid out in the Handbook are you using?
- Planning your final report. How would you rewrite your agency plan in light of this experience?

Month 5 Webinar

The final webinar might be for wrapping up the pilot and looking ahead for future program improvement. Here is some suggested text for the invitation and webinar facilitation:

This webinar will give us an opportunity to explore two major issues as a group:

1. How well each of the pilot projects, as they were implemented, worked for your populations?
2. What changes you think should be implemented to make the programs more successful in the next iteration?

We are not hoping to come to conclusions in this webinar, but rather, our goal will be to point the way for future projects to learn from your experiences. To help get the process started, please respond to the following questions and email them to me before the webinar.

1. In what ways did this program work well for your target population?
2. What changes would you make for the next project, and why?



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