IDEAL Distance and Digital Education Handbook

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IDEAL Distance and Digital Education Handbook, 9th Edition

EdTech Center @ World Education

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The 9th Edition of the IDEAL Distance and Digital Education Handbook provides guidance on setting up distance and digital education opportunities in adult foundational education programs. The organization of the Handbook chapters reflects important programmatic considerations, including: recruitment, screening, orientation, instruction, and assessment. The guidance provided and reflection required in each chapter support the development of practical plans for distance and digital education including pure distance, hybrid, blended, HyFlex, and remote live instruction implementation. The end goal for readers of the Handbook is crafting a distance digital education program planning document. This edition builds on lessons learned from innovations developed in response to COVID-19 school closures and decisions programs made to sustain innovations after the pandemic, adds information about HyFlex course creation and implementation and Generative Artificial Intelligence integration, and includes insights about attending to equity in distance and digital education programming.

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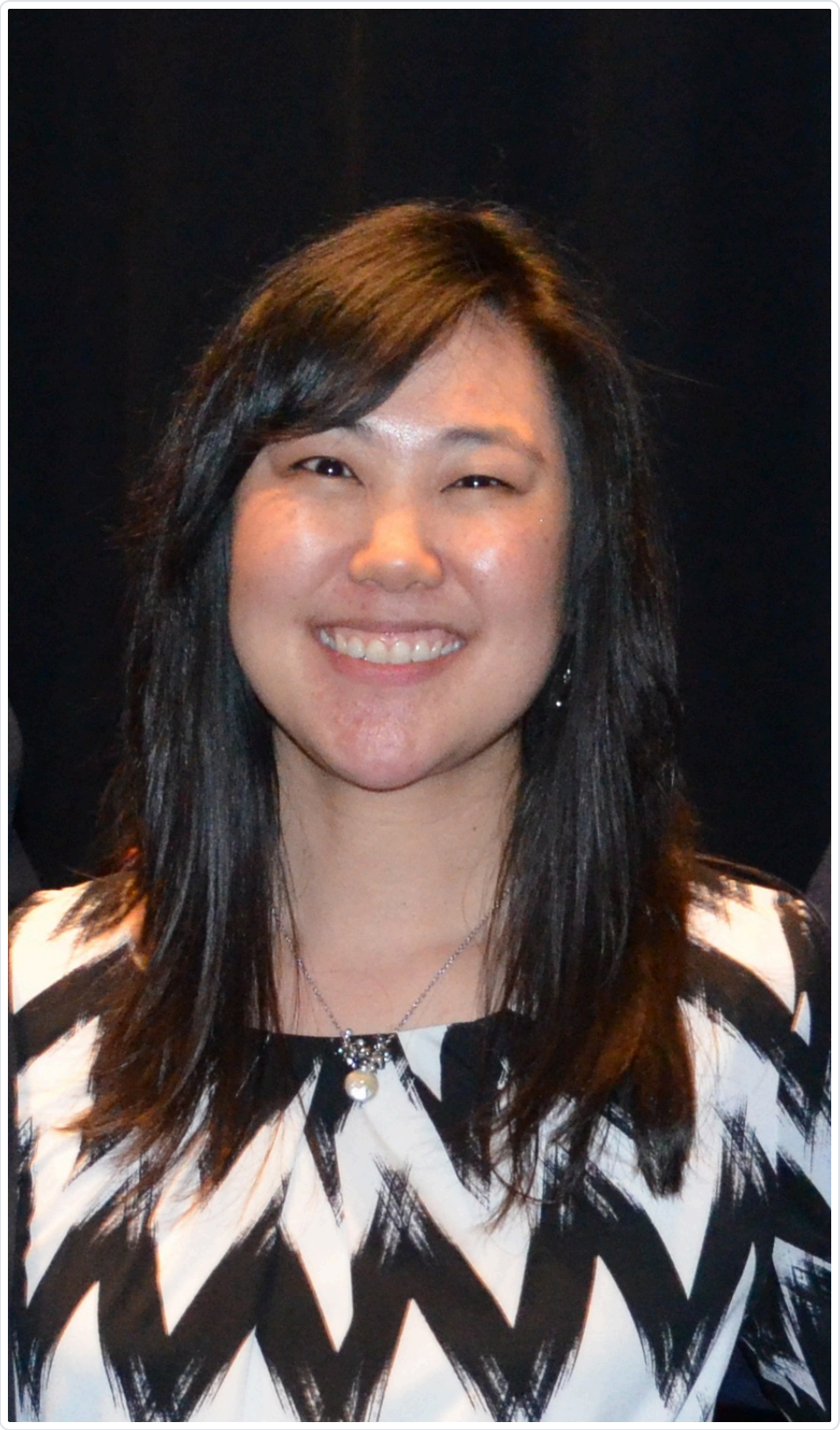

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Destiny Simpson has worked in the adult education field for almost two decades. She started as a volunteer tutor and then became a teacher, program manager, and professional developer. In her role as a consultant for the EdTech Center@World Education, she helps to develop and facilitate courses, plan the annual IDEAL Consortium Summer Institute, and create resources for adult education organizations to use as they plan and implement distance education programs. She has a Master's Degree in Adult Education and Communications Technology.

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Since 2020, the variety of formats and technologies being used to deliver distance and digital education have rapidly accelerated. The COVID-19 pandemic and the resulting immersion in distance education showed the potential benefits of using flexible instructional modalities that leverage technology to personalize, enhance, and expand learning. We also observed that, for that potential to be equitably realized, program administrators and teachers need to attend to learner needs and technology access, devote time to plan for and deliver contextualized digital skills instruction, and continuously build their own capacity to learn about and then integrate ever-changing digital technologies like Generative Artificial Intelligence (GenAI). IDEAL Consortium member state leaders have responded to these challenges and have continuously shared their expertise; they are frequently presenters at national adult education conferences and other professional development events addressing topics like the use of open and free education resources, using GenAI to plan instruction, or implementing digital navigation programs. As such, the collaboration fostered through IDEAL has proven a rich incubator for exploring ideas, sharing useful strategies, and collectively solving problems of policy and practice that has spilled out to positively shape innovative adult distance and digital education programming across the United States. This edition acknowledges that generosity, which characterizes the IDEAL Consortium. As conveners of the IDEAL Consortium and providers of technical assistance to adult education programs across the country, we at the EdTech Center @ World Education have been in a unique position to watch, document, and amplify innovation. We have updated this edition to honor and share the IDEAL Consortium's evolving work in distance and digital education. Special thanks also to our colleagues Cynthia Peters, Justine Schade, and Eloise Teisberg at World Education, who supported the quality of this edition through copy editing and layout in EdTech Books.

Our History

IDEAL Consortium was founded as Project IDEAL in 2002 by Dr. Jere Johnston as a consortium of states interested in developing distance education programs. Under Dr. Johnston's leadership, collaborative research and program development facilitated by

Project IDEAL demonstrated that distance education was a viable option to meet the needs of adults for whom classroom options were either not available or not a good fit. As a voice for member states, IDEAL has shaped distance education policy at the state and national levels and has provided professional development expertise for practitioners nationwide since those early years.

Since 2015, The EdTech Center @ World Education has convened what we now call the IDEAL Consortium. Initially led by Dr. Jen Vanek, our current leadership is shared among World Education's Jamie Harris, Destiny Simpson from Tuscarora Intermediate Unit 11/Open Doors Learning and Design, and a team of nationally-recognized edtech adult education leaders. 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 members of Project IDEAL. Under Dr. Johnston's stewardship, the Handbook evolved through several editions, each time incorporating the lessons learned since the previous publication.

After the transition of the IDEAL Consortium to World Education, the fifth edition, published in 2015, added substantial updates based on experiences in the field since 2008, particularly the expansion of blended learning programs and program changes required by the Workforce Innovation and Opportunity Act (WIOA). The sixth edition (2018) provided key updates gathered over two years of watching the Handbook in use. The seventh edition (2020) included updates deemed necessary after practitioners across the U.S. were faced with rapid scaling of distance education during the early days of the COVID-19 pandemic. The eighth edition published in 2022 shared the lessons learned as the field moved from the emergency transition in 2020 to remote instruction to the now more sustainable distance education programming. The edition also more intentionally addressed the critical role of equity in distance education for adult foundational learners and included much needed guidance on the use of open and free resources.

This ninth edition includes global updates that reflect the innovative strategies and resources we have observed across the consortium in the past two years and includes new information about integrating GenAI into instructional planning and delivery. There is a universal shift that bears introduction here. We have retitled the publication IDEAL Distance and Digital Education Handbook. The previous title used for the fifth through eighth editions, The Distance Education and Blended Learning Handbook, no longer sufficiently encompasses the range of instructional modalities in place in IDEAL member states, including live remote instruction, hybrid-flexible (HyFlex) options, and seamlessly integrating blended learning into instructional practice. We hope this new edition inspires growth for the IDEAL Consortium membership, which enriches our community of practice by bringing new ideas and collaboration. Our shared goal is to collaborate in support of providing quality distance and digital education to adult learners. For information about the IDEAL Consortium Community of Practice, visit our information site: https://edtech.worlded.org/ideal-consortium.

Suggested Resources for Further Exploration

EdTech Center @ World Education – The EdTech Center @ World Education advances digital equity to enable everyone to thrive as learners, workers, family members, and community members in today's increasingly tech-enabled world by supporting organizations and communities to use technology to increase the reach and impact of education and other humanitarian initiatives.

IDEAL Consortium Community of Practice – The Innovating Digital Education in Adult Learning (IDEAL) Consortium, a project of the EdTech Center @ World Education, works to support quality technology-enriched instruction in adult education and literacy programs across the United States. For over 15 years, the IDEAL Consortium, previously Project IDEAL, has provided technical assistance, web-based tools, and publications to member states to help them design distance, blended, and HyFlex learning options.

Introduction

The content in this updated edition of the *IDEAL Distance and Digital Education Handbook* shares strategies and resources to help programs implement a range of instructional modalities supported by digital technologies, including: distance education, blended or hybrid learning, live remote instruction, and hybrid-flexible (HyFlex) instruction. Whether you have years of experience teaching learners at a distance and using edtech in your instruction, only came to it because of the COVID-19 pandemic, or are entirely new to it, this guide is for you! Through it, you can enhance your skills in providing distance and digital education, especially modalities that are useful when you are helping learners who are not in your physical classroom. The information we share is based on reports from programs across the United States about how they built on their pre-pandemic distance education, pandemic-era innovations, and the thoughtful practices that have remained in use since.

We have never had a deeper or wider pool of informants contributing to our understanding of promising strategies and resources. Data from the National Reporting System for Adult Education (NRS) make it clear that the slow progress the field was making in expansion of quality distance education prior to the pandemic surged in 2020–2022. From 2016–2019, only about 4% of total learners were reported on NRS Table 4C, the optional table available to report distance learners' engagement and progress. NRS data also show that, during those years, distance learners performed as well or better than non-distance learners. Since 2020, implementation and reporting of distance education has grown. 2019–2020 NRS data show that programs reported serving 16% (172,220 learners) of all reported learners through distance education (National Reporting System for Adult Education, n.d.-a; Vanek, 2022). NRS data for program year 2020–2021 show an even larger increase; 45% of the reported 709,004 learners engaged in distance learning (National Reporting System for Adult Education, n.d.-a). The most recent data from 2022–2023 show 238,929 of a total of 1,092,427 reported as distance learners (National Reporting System for Adult Education, n.d.-b). The pandemic-era surge appeared in the 2020–2021 data; what is notable about 2022–2023 is that the percentage of reported distance learners is higher than in 2019–2020 —and represents a larger number of learners who achieved measurable skill gain, 39% compared to 36% of learners not reported as distance learners. Table 4C is optional, so the engagement is likely under-reported.

This Handbook, the attendant course (IDEAL 101), and the development of the implementation plan that is part of the course provide the opportunity to develop proactive strategies to enhance learning and expand capacity in a sustainable way. This Handbook

addresses both administrative and instructional issues that are at the core of successful distance and digital education. The Handbook is informed by current and prior research, policy guidelines and observations of effective practice documented by IDEAL Consortium members, past and present, and affiliated state leaders. The collective wisdom of past and current members is included here as the foundation for our interpretation of how to best leverage recent technological innovations to support quality instruction at a distance.

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I "Table 4C likely under-reports actual engagement in distance education because 1) not all states report distance education time, 2) states use it to report participation only for learners engaged in distance education as a majority of their time…" (Vanek, 2022).

Structure

This ninth edition of the Handbook is the fifth to be authored under the stewardship of the EdTech Center @ World Education. Though its structure mirrors that of the previous editions written 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 new technologies and attendant instructional shifts that support maximizing flexibility and personalization of learning, with a particular focus on equity.

The Handbook is a digital resource, with embedded links to external resources like videos, sample instructional materials, and policy and practice publications. As such it is intended to be accessed online. It is organized around important programmatic considerations for setting up distance and digital education or expanding options for other modalities like blended/hybrid learning or Hybrid-Flexible (HyFlex) instruction. Each chapter guides you to develop practical plans for such instruction. The end goal for readers is to craft a planning document to support implementation of distance or other forms of digital education like blended, hybrid, remote live, or HyFlex. The remaining chapters are as follows.

Chapter 1 | Setting the Stage

- Presents the data regarding the need for adult education services, digital skill instruction, and distance and digital education opportunities.
- Defines terminology related to distance and digital education.

Chapter 2 | Recruitment: Identifying and Recruiting Students

- Decide who to recruit, where to find them, and how to attract their attention.

Chapter 3 | Assessing Readiness: Determining What Supports Students Need

to Succeed in Distance and Other Forms of Digital Education

- Identify learners' skills and technology access gaps so that you know the support they need to succeed.
- Strive for equitable access to adult education services and technology.
- Provide completely remote options for intake activities.

Chapter 4 | 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.
- Teach digital literacy skills and build learners' digital resilience.
- Provide completely remote options for orientation.

Chapter 5 | Instruction: Getting Started

- Learn about characteristics of instruction featuring ample teacher involvement and how these characteristics are represented in different education models (e.g., fully distance, blended learning, HyFlex), the teacher role, and how to provide motivating and supportive feedback on students' work.
- Consider how to develop teacher-created curricula that are standards-aligned and make use of Open Educational Resources (OERs) and crowdsourcing.
- Deepen understanding of how to make best use of proprietary online curricula and other educational and communications technologies, including selecting appropriate tools based on instructional goals and context.

Chapter 6 | Assessment: Student Participation and Progress

- Explore the different purposes of assessment.
- Explore multiple ways to gauge learner progress, including how to include distance learners in the National Reporting System (NRS).

Chapter 7 | Administrative Issues: Getting Started

- Learn how a pilot approach and creating a culture of experimentation encourage innovation.
- Examine issues that administrators face in implementing and sustaining distance education programs as part of their organization's educational offerings.
- Explore organizing distance and digital education programs through the lens of a theoretical framework to create a more impactful and efficient experience for all stakeholders.

- Better understand how to monitor data and distance education program performance. Learn how distance education is linked to WIOA guidelines and prioritized adult education initiatives.

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 and suggested resources for further exploration designed to help teachers and administrators plan and implement a new distance education program or improve an existing program. A complete list of suggested resources for further exploration is available in Appendix A.

These chapters serve as the basis for the IDEAL Consortium's introductory online course IDEAL 101: Foundations of Distance and Digital Education. Digital versions of the reflection activities at the end of each chapter are available in the course for IDEAL Consortium member states. The final chapter, Chapter 7, discusses issues critical for setting up distance and/or digital education programming from the perspective of a program administrator.

Together, the chapters provide structure for creating or revising a distance and/or digital education implementation plan for your adult education program. Now is the time to reflect on your past work in this area and then, based on lessons learned, build strategies for even more effective programming.

Using the Handbook as a Springboard for Change

We hope that you will think about developing or improving your distance and digital education program systematically, considering each aspect of programming defined in this Handbook. As you read, please keep the following points in mind.

- **Consider learners first.** Approach this using a holistic approach to program development or improvement that takes into account all aspects of educational programming. Don't lead with technology procurement. It is not enough to buy a license for an online curriculum and hire a teacher. The experience of the learner needs to be considered from the time they express interest in learning through supporting successful program exit.
- **Start small.** As you get started, 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 and choosing technologies and processes that you will use to organize, deliver, and communicate about learning content. After you've selected your targeted group of learners, perhaps start with one core curriculum. 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. Consider using one primary communication tool (e.g., WhatsApp, Remind, email) and one venue for organizing and delivering content (e.g., Google Classroom, Canvas, Moodle).

Example of how this might look in practice:

Think about a targeted group of learners	Choose appropriate learning materials, identifying or creating supplemental activities as needed	Choosing technologies and processes to organize, deliver and communicate about learning content
My morning class - ESOL Level 3	I'll start off using USA Learns as my core curriculum. Then as my learners and I become more familiar with it, I will identify or create additional instructional materials to fill in any gaps and further address skills.	I'll use Google Classroom as the place where my in-person and online learners can access important course information and learning activities. I'll also try using WhatsApp to send important reminders in addition to Google Classroom announcements.

- **Provide adequate training and support for teachers.** Provide staff with the support, training, and time they need to put your plans into practice. Continue to expand quality programming with professional development that is relevant and sustained (Gulamhussein, 2013). If you have an existing distance and/or digital education program, use the Handbook with new instructors and administrators. It can help them consider the issues they need to address in order to implement your program.
- **Keep reassessing.** Technology is a dynamic beast! Both the technological demands and the learning resources are constantly changing. This doesn't mean your programmatic design needs to change at every technological whim, but it does mean you should try to stay aware of innovative resources that are available and have a strategic approach for evaluating and implementing them for continuous improvement.
- **Focus on equity from the beginning of your planning.** Every adult learner deserves equitable access to the skills and technologies required to participate in flexible and personalized learning. Focus on how you can make this happen in your state. There are many useful strategies described in the chapters that follow.

How to Use This Handbook...

...to create new programs

If you are setting up a brand new distance and/or digital education program, you are likely using this Handbook as a component of IDEAL 101. If so, here are some tips to make the most of the experience and create a useful and implementable distance and/or digital education site plan to pilot.

- Be sure at least one administrator and one teacher are working together in IDEAL 101. This way, both administrative and instructional considerations will be included in the plan.
- Administrators, consider reading Chapter 7 first. The information there will help you support your team through this learning and the resulting pilot.
- Read the chapters in order (unless you're an administrator). The issues covered in each chapter mirror the sequence of a learner's contact with the distance and/or digital education program. If you go in order, you will see how support for the learner unfolds.
- Allow time for daily participation in the IDEAL 101 online discussion. 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. For example, you could meet once a week synchronously using Zoom and work asynchronously in Google Drive so that you can collaborate and see each other's work at times that work best with your schedule.

… within existing programs

We believe that teachers or administrators new to implementing distance or other forms of digital education like blended learning or HyFlex—but coming into established programs—need to understand the ways that teaching in such models differs from strictly in-person classroom programs. Furthermore, all participants can benefit from reflection on how to leverage technology to provide more flexible and personalized learning experiences. Teachers working in programs with robust distance, blended, or HyFlex programming need to understand the reasons their organization's programming is structured as it is. They need to develop skills for teaching in a learning environment that includes digital technologies to support learners who might be at a distance from the physical classroom.

A good first step is to review the list of teaching and technology skills for distance teachers in Appendix B and Appendix C. The appendices provide the new teacher with both a deeper understanding of what distance and digital teaching entails and a chance to reflect on the skills they already possess. Discussing these resources with the program administrator provides the starting point for a conversation about what skills the teacher needs to develop and 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 and digital education to adult learners and offer concrete examples from experienced teachers. If enrolled in IDEAL 101, these new teachers should follow the set of activities in the course for existing programs. These activities require the participant to review the distance and digital education plan developed by the original teachers and administrators who participated in the IDEAL 101 course and then, working with administrators (if they are new teachers), complete the activities by incorporating any fresh ideas they might bring to distance and digital education programming.

Following this process, an adult education organization can continuously update its distance and digital education implementation plan. It may be helpful to have the experienced teachers in an organization informally mentor new teachers and help them make the transition from classroom to distance, blended, or HyFlex instruction. New and experienced teachers would benefit from becoming involved in a community of practice where teachers support each other in their efforts to build and expand their distance, blended, and HyFlex 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, technology-supported distance and digital educational programming varies greatly depending on the learner, 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 barriers that may have prevented them 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 and digital education program and developing the skills to become an effective distance education, blended learning, or HyFlex 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 fledgling efforts and allow time for growth.

We welcome you to join us in this work and to become a champion for distance and digital education. Our predecessors in this work, Leslie Petty and Jere Johnston, elegantly noted in the introduction to the fourth edition in 2008:

> *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 (Petty & Johnston, 2008)*

The words ring true today and, in fact, have taken on more urgency. At a time when programs are working hard to make the most of lessons learned during the pandemic and pandemic recovery, they rely more than ever on the energy and creativity of teachers and others committed to sustaining innovations. We believe that a thoughtful approach to building distance education, blended, and HyFlex programming make this possible and that the path to success is through systematic experimentation supported by professional development and reflection.

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Chapter 1

Setting the Stage

Introduction

This chapter will provide context to establish the importance of strong distance education programs and blended learning in adult education, and how the IDEAL Consortium has been able to support adult education programming. The first two sections will provide language you can use 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 and/or digital education program?

In the United States, adult education programs enrolled 1,092,427 learners during program year 2022–2023 (National Reporting System for Adult Education, n.d.). Yet this is only a fraction of the estimated 39 million adults in the United States who have foundational literacy needs and/or lack a high school diploma (National Association of State Directors of Adult Education, 2024)). Traditional barriers—such as lack of transportation or competing responsibilities from work and family—have prevented these adults from participating in adult education classes. The pandemic exacerbated these issues and added more challenges.

In 2020, the sudden onset of the COVID-19 pandemic and the rapid pivot that programs had to accomplish to provide Emergency Remote Instruction (see Moore & Hodges, 2023) highlighted the need for equitable access to flexible, technology-rich adult education

programming. Programs with some expertise and resources in place prior to the pandemic were able to keep more learners engaged in learning than those that had not set up distance education. Those with lending initiatives in place were able to ensure that at least some learners had access to laptops and hotspots, and if they had integrated digital literacy instruction into their academic skills development were able to leverage learners' skills and comfort to keep them engaged in academic learning (Belzer et al., 2020).

Additionally, the COVID-19 pandemic made clear that distance and/or digital learning would be a permanent feature of adult education. Recent research on instructional shifts during the pandemic suggests that among both teachers and learners, many expressed a preference for more flexible distance options once they grew comfortable with the technologies employed (World Education, 2020). Similarly, Moe and Rajendra (2020) note that blended models with the flexibility to adjust for future surges in the pandemic would be the new norm.

This heightened demand to provide technology-rich instruction creates opportunities for learners to build technology skills while simultaneously building foundational academic skills, a strategy proven to support learning (Jacobson, 2012; Rosin et al., 2017). Technological advancements and the proliferation of augmented reality, gamification techniques, and GenAI, introduce a new urgency to this demand. Implementing a quality distance and/or digital education plan is an appropriate response to the reality described above.

WIOA and Distance and Digital Education

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

- States are required to provide technical assistance for integrating technology into programs, and federal policy 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 Adult Education and Family Literacy Act (AEFLA) 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 furthermore, 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).

Access

Historically, concerns over the digital divide and the inherent equity issues it creates have prevented many organizations from embracing distance education and investing the necessary time and resources to establish formal programming. The term *digital divide* is

not limited to describing access to digital technology; it is also conceptualized as a gap between those who have affordable access, skills, and support to effectively engage online and those who do not (National Digital Inclusion Alliance, n.d.). There are certainly equity issues regarding access to the devices and internet. The Pew Research Center (2024) reports that only 57% of adults in households earning less than $30,000 a year and 65% of adults with educational attainment of high school or less have home broadband. To put this in perspective, according to recent American Community Survey (U.S. Census Bureau, 2022) data, this represents about 7% and 26% of all U.S. adults, respectively.

Furthermore, the Pew Research Center (2024) has found that smartphone dependency among all U.S. adults—that is, individuals with phones serving as the primary source of internet—is 15% but increases to 24% among those with a high school diploma or less. The Pew Research Center (2024) also reports there is a wide gap between the percentage of U.S. adults who do not have broadband at home but own smartphones when looking at both income and race, with those who make less than $30,000 a year and people of color being much more likely to rely on a smartphone for online access than other demographics. These findings, as a whole, suggest that there are adult learners who have access to the internet and devices, but that programs need to make sure they offer access options for those who do not, and that any technology-enabled instruction needs to be mobile-friendly.

Necessary Digital Skills

Learners need digital skills in order to meet the demands in their everyday life as a family member and citizen, as well as their academic and career goals. An analysis of the U.S. labor market found that 92% of jobs required digital skills (National Skills Coalition, 2024). Including instruction to build digital skills not only helps learners meet their skills while participating in your adult education program, it also provides valuable transferable skills that learners will use in many aspects of their lives.

Important Terminology

Teams need to choose an instructional approach that will serve as the foundation for your work as you plan. The approach needs to align with the goals you have for offering technology-rich and flexible programming. Are you trying to address limitations in the content that you currently teach (i.e., extend, remediate, or fill in gaps for what is being taught)? Or, are you trying to address who is taught (i.e., attempting to retain existing learners or reach a new group of learners)? Different approaches suit different goals.

It helps to have a shared language to describe the work ahead, so we have provided definitions for different approaches. Although most of the definitions were constructed in the years before the pandemic, using them as a starting point can make your current plans and ideas more concrete. Consider these definitions with flexibility, so that you can make connections to what you are currently offering in your program.

Distance and Digital Education Definitions

Digital Education

Digital education is the use of digital tools and technologies to enhance teaching and learning. For the purposes of this Handbook we include the different instructional modalities known to be offered in adult education settings and defined below.

Distance Education (DE)

Distance education is defined in the National Reporting System (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 by mail, telephone, e-mail, or online technologies and software. (National Reporting System for Adult Education, 2024, p. 48).*

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

Distance Learning (DL)

Many programs use the term distance learning instead of distance education. However, in this Handbook, we consider distance learning as the term to describe what a learner is doing. It is the learner's perspective; what they are doing, not what the program is offering (Askov et al., 2003), to support learning when they are separated by time for the majority of the instructional period (according to NRS guidance).

Blended, Hybrid, HyFlex and Supplemental Modes of Learning

These approaches integrate a mix of instructional models. Murphy et al. (2017) arrived at useful definitions based on their study of digital learning in adult education programs across the country. They explored the use of different online learning curricula in 13 programs by 105 instructors with 1,579 adult learners. Based on their observations on the use of the curricula, they came up with the following:

Blended Models

Blended models are characterized by "tight integration" of the instruction delivered online and that which happens in a class (Murphy et al., 2017, p. ES-5). Instructors

consider both in-class and online instruction as part of a collective whole, making adjustments to their in class teaching based on what they see as they monitor learner work online and altering online assignments based on what they observe in class. The Clayton Christensen Institute further defines this approach as one that allows learners to control time, place/space, and pace of learning. Using this approach, practitioners carefully design and sequence instruction to incorporate multiple options for learner content engagement: independently with content, with each other, and with the instructor (Christensen Institute, 2016). To visualize this model, you can think of a kitchen blender where ingredients come together into one. In the blended model, online and in-class learning blend together into a cohesive experience).

Hybrid Models

Hybrid models employ both an online curriculum product and in-class teaching. Though the teacher is monitoring it, the assigned work that learners complete online may not be directly aligned with what happens in the classroom. Note that in some states, hybrid also refers to programs that offer a period of in-class instruction followed by a period of online learning and some states use the terms blended and hybrid interchangeably (Cherewka et al., 2024).

HyFlex Model

As a result of the pandemic, a number of adult education agencies adopted the HyFlex model (Rosen et al., 2022). Beatty (2019) defines HyFlex as an instructional model that offers learners the opportunity to choose between in-person synchronous class, online synchronous class, and asynchronous online learning activities. Beatty (2019) proposes that learners need to shift among these options at any time, with each mode of instruction always being available, except when classes must be canceled. The EdTech Center @ World Education developed the *Guide for Design and Implementation of Hybrid–Flexible (HyFlex) Models in Adult Education* and video series since this is an emerging instructional model for adult education agencies.

Remote Instruction

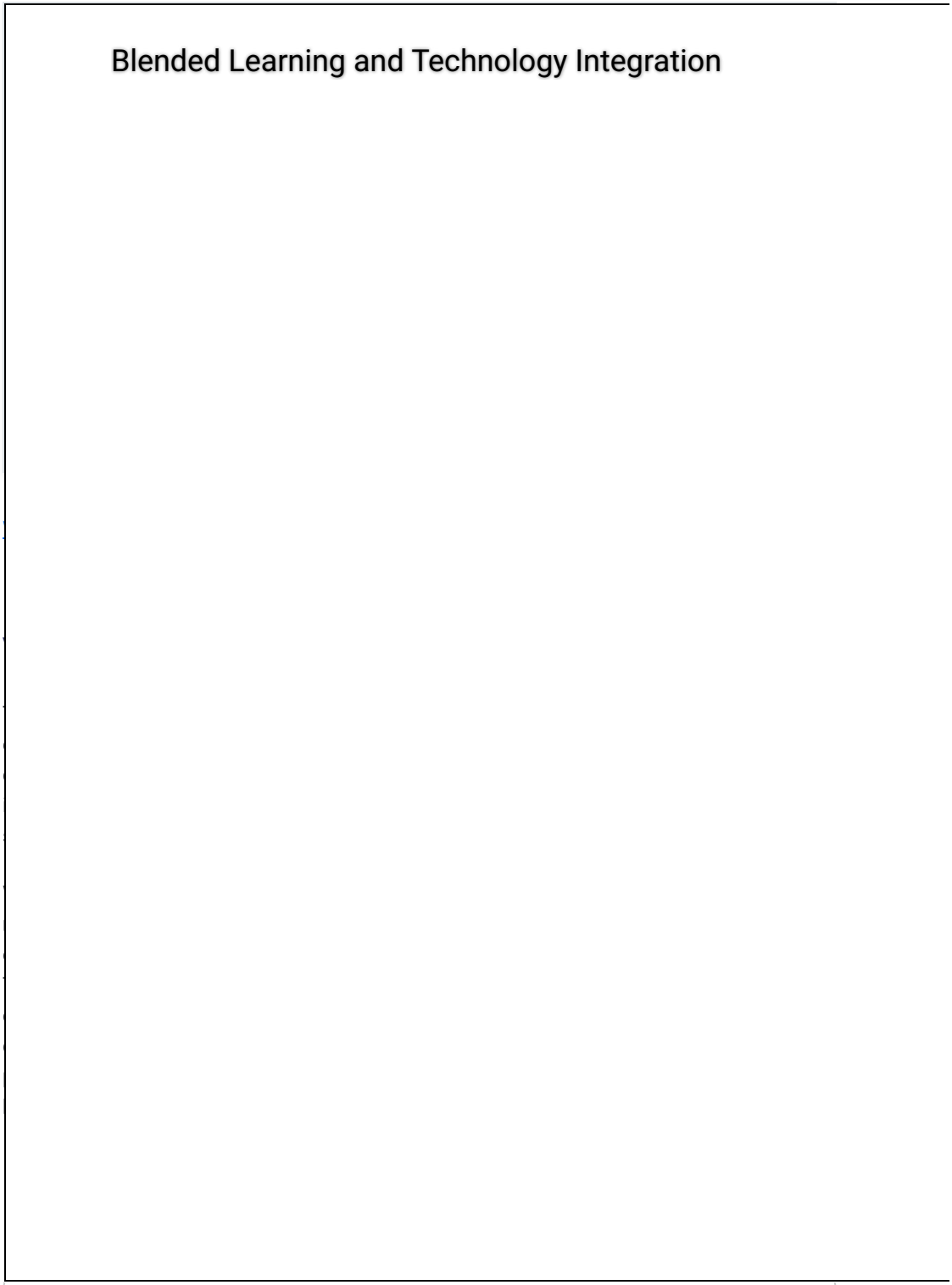
This instructional model gained popularity as programs rapidly shifted their in-person, in-class instruction to an online format during the COVID-19 pandemic. Some programs refer to this type of instruction as virtual instruction. The programs that are fortunate enough to have learners with access to the internet and devices can choose to continue providing online instruction by using videoconferencing tools such as Zoom, Google Hangouts, or Skype. Whole groups of learners might choose to meet with a teacher at the same time and, if the conferencing tools allow it, might even break out into small groups during the course of the online video class.

Supplemental Models

Supplemental models make use of optional online curricula outside regular class time. The teacher does not require the learner to do the work and may not even check it. This is extra work that is aligned to the goals of a course but does not require much extra effort on the part of the instructor.

Classroom Technology Integration (CTI)

Equally important in the academic experience, but not to be confused with blended learning, is classroom technology integration (CTI). CTI helps teachers work more efficiently and provides the means to make learning more engaging. For example, a teacher might make a vocabulary study set or quiz for the classroom using Quizlet or Kahoot. It may be useful to understand that CTI differs from blended learning, which moves the role of technology beyond that of just being a useful tool to support learning in the classroom. In blended learning, technology is an actual mode for instruction or collaborative learning; for example, if you take a Quizlet vocabulary set and ask learners to work together on Zoom or via a Google Doc to write sentences using that vocabulary, you are transitioning from CTI to blended learning. This distinction is nicely framed in this video:



Activity 1.1 Survey of Needs and Capacity

Start thinking about how you will define your distance education pilot.

Now that you have a sense of the importance of this work and understand different approaches and the terms we use to describe them, let's get started. A great first step is to consider the goals of your program, your resources, learners, state policies, and program goals. You can do so by answering these questions.

1. Who are your learners? What are their goals?
2. When can they come to online and/or in-person class?
3. What are the characteristics of your geographical location? Is your program hard to get to? Are there learners whose participation in your program is limited or inconsistent who might participate more regularly if offered supported study at a distance? Are you able to meet in person?
4. What technology resources can you share with your learners?
5. What technology resources do they have access to on their own?
6. What technology resources do teachers have access to for teaching?
7. What are the technology skill levels of your learners? What skills would be required?
8. What are the technology skill levels of your teachers? What would be required? What resources are available to support them to strengthen their digital skills and technology integration?
9. What flexibility do you have for establishing instructional content? Are you required to use a curriculum chosen at the state level? Are you allowed to choose your own or even create your own?
10. After reading the definitions provided above, how would you describe the distance and digital education models that you (will) provide? Are there other key terms your state or program uses that might differ from this handbook's terminology?

Activity 1.2 Your Initial Plans

Start defining your distance education pilot.

The big goal that you have as you work your way through this Handbook is to create a site implementation plan that will define a pilot. You will have much more success if you narrow the focus of this pilot as you complete the activities at the end of each chapter in this Handbook. Which modality will you choose to explore and then describe in your implementation plan? What are the characteristics of learners you think will participate? What is your goal for offering this modality? What do you hope your learners gain from it? How will it benefit your teachers and program more broadly? What resources can you draw on for instruction?

Administrators reading this might want to skip ahead and read Chapter 7, Administrative Issues: Getting Started. The content of that chapter outlines key considerations for implementing an experimental program or pilot. Though these considerations will be critical for you to reflect on closer to the start of your pilot, having an awareness about them now can inform your reading, discussion, and activity completion in the earlier chapters and modules.

Note that in the course, IDEAL 101: Foundations of Distance and Digital Education, these prompts are expanded into fully developed collaborative activities for your team to complete together.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Chapter 2

Recruitment

Identifying and Recruiting Students

Introduction

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: *Whom 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? Are you recruiting for remote live instruction? The programming you want to create and the type of learner you suspect will persist will determine whom you recruit.

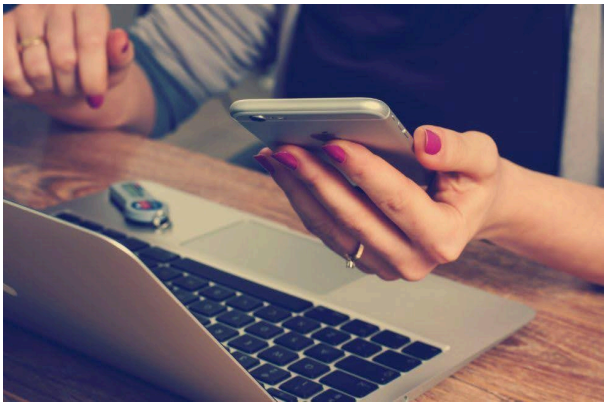
What Audience Do You Hope to Serve Through Distance, Blended, Blended, Hybrid, or Remote Live Instruction Options?

Early research on distance learning in adult education in the United States illustrated the importance of finding the “right” learners and setting them up correctly if programs were to succeed in offering distance education (Askov et al., 2003). Today, when so many programs are leaning heavily on remote options, a more equitable and effective approach would be to

ask whether your programming offers the “right fit” to meet the needs of the learners who show up.

Nonetheless, it is prudent to locate students whose needs you are confident you can meet. Outreach, marketing, and communications are all components of publicizing and promoting opportunities outside of your organization. Effective recruitment communication reaches people at the right time and place. Setting a strategy before you begin is essential. The first step is to consider your goals and target audiences—who do you want to reach? What groups of learners are in your community, but are not yet well-served by your organization?? Make decisions about what to communicate and to whom by answering these questions:

- Who needs to know about the learning opportunity?
- What do they need to know?
- When do they need to know?
- What actions do we want them to take?
- What are the best ways to reach them?



Think about what you are offering. Are you adding distance education or another form of digital education like hybrid, HyFlex, or blended learning to existing educational programming? If so, you need to consider how these will best support learners. For example, will new distance and digital education options offer new areas of instruction, or teach content parallel to classroom-based programs, but by being online offer more flexibility? Will they be aimed at learners already being served by the organization, or will the organization attempt to reach new audiences? These decisions should be made in the context of the organization’s goals and missions, based on perceived needs of the organization’s clientele, and on early thinking documented in the previous chapter. This planning for recruitment is a starting point and may evolve as you move through the next stages of planning.

What Skills Do Students Need to Be Successful? What Supports Will Help Them?

You can most efficiently use your organization’s resources if you target the learner audience you know you can help succeed. That is, you need to understand the technology and academic content demands of the learning resources and activities you plan to offer balanced against the support you know you can provide. Keeping this tension in mind as you craft your recruitment message will help you decide whom to focus on for recruitment and how.

For example, an English language learner still working on literacy development would likely not succeed using learning resources developed for learners reading at an Adult Secondary Education level. If you know you will be relying on curated resources or a licensed curriculum

that best serves that level, your distance and digital education recruitment messaging should make that clear. What about a learner who has limited prior experience using a computer? They might struggle with online resources, so, if you recruit them for distance and digital education options, you need to make sure you have processes and resources in place to support them, even if you are working completely remotely. If support and those resources are scarce, you may need to consider recruitment strategies that are likely to attract more tech-savvy learners. Being thoughtful about recruitment is important because learners learning at a distance can receive less direct social or academic support than their classroom-based counterparts.

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

Whether you are teaching in a blended, hybrid, HyFlex, or other distance format, successful learners are likely to be self-motivated, able to work independently, and possess strong study and organizational skills. Some programs have suggested that the skills needed to succeed vary depending on the model of distance education used. Learners with higher academic skills, such as those studying for a high school equivalency test (e.g., GED®, HiSET), may be able to read more independently. However, reading skills do not equate to digital literacy skills. Learners with emerging academic skills, those who need more support, or those who are English language learners may fare better in a blended program that combines some independent online learning with ample in person interaction; however, anyone can learn online if there is balance among the learner's skills, the technology demands, and the support available (Silver-Pacuilla & Reder, 2008). That is, when the demands are high, either there is more support, or the learner has the skills and proficiencies to meet the challenge.

One of the major differences between traditional classroom instruction and distance education is the amount of in-person contact learners have with their teacher and other learners. Seminal educational research showed that learning is a social process (Bandura, 1986), and the support of teachers and classmates can be an important element of the learning that occurs. Most teachers working in distance education (rather than blended learning models) may meet with their learners only once or twice over an entire course, with the remainder of the communication occurring by telephone, by email, or through online learning communities.

Additionally, distance learners may have little or no face-to-face contact with other learners taking the same course. This means distance learners 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 (Wang et al., 2008; Wright, 2015). Ways to determine whether or not learners have these persistence characteristics will be discussed in Chapter 3, but your recruitment strategies can be set to target learners who potentially possess them.

Using Journey Mapping for Improving or Expanding Your Recruitment Efforts

One way to examine your current recruitment efforts and plan additional efforts is through mapping your potential learners' engagement from the first touchpoint with your program and throughout their time with you. The National Reporting System for Adult Education (2022) developed a learner recruitment training and resource to support adult education programs' closer examination of their recruitment and intake processes. Mapping the touch points learners experience in your recruitment and intake process allows programs to more closely examine opportunities for effectively engaging with learners and identifying pain points as a way to strengthen recruitment efforts.

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

Recruiting Known Learners

For hybrid, HyFlex, and blended learning, it is often best to start recruiting with your current learners. 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, these digital education options for current learners need not be offered to all learners in a classroom. They offer a means to personalize learning (Murphy et al., 2017), and can support differentiated learning activities as a feature of your instruction. Teachers can also offer distance options to learners in their class who want to increase their pace of learning and are willing to work toward completion of online activities independently.

Another approach is to recruit currently enrolled learners to participate in distance education that is not directly linked to classroom instruction. According to the Murphy et al. (2017) study, this would be a supplemental model of use for an online curriculum. In 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 by the classroom teacher.

There are many creative ways to recruit current learners to supplemental distance education. Classroom demonstrations work well for showing learners exactly what distance education resources or curricula look like. Announcements on electronic bulletin boards or posters can serve as a constant reminder that there are ways to intensify learning. Additionally, an organization's websites or social media accounts can be used to communicate with existing learners. 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, meeting 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, organizations conducted recruitment in the broader community using low-tech approaches—flyers posted in libraries, community education centers, and restaurants frequented by English language learners. For example, a program administrator in northwest Michigan convinced local fast food restaurants to use tray liners featuring information about her program. These methods are still useful, as are public service announcements or advertisements in local newspapers, on public radio stations, and on local cable channels, or a scrolling digital message at the Department of Motor Vehicles or other public facilities where people need to wait. Programs may want to consider making these materials in multiple languages. All of these efforts, when consistently sustained, can create name recognition of your organization in the broader community that may lead to personal referrals over time.

Be sure to use clear language in recruitment communications so that your audience will understand your messages and experience fewer barriers to accessing your program. “A communication is in plain language if its wording, structure, and design are so clear that the intended readers can easily find what they need, understand what they find, and use that information” (International Plain Language Federation, 2019). This plain language guide was developed to support adult serving organizations in communicating clearly with participants.

Tools like Hemingway Editor give helpful feedback on the readability of your writing, letting you know what grade level your draft is written at and highlighting sentences where you can make suggestions. Hemingway’s “Rewrite” feature and similar applications like ChatGPT, Claude, Google’s Gemini, and Microsoft’s Copilot use GenAI to support a range of language-related tasks including brainstorming, editing, translating, and even making suggestions to optimize your writing for social media posts. You might find these tools helpful in developing recruitment content.

Many of the same electronic strategies you use to connect with current learners can also be used to reach out to the larger community. 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 organization’s website. Make sure your website is attractive, easy to navigate, and frequently updated with essential information, such as how to enroll or get support. Make sure it has these characteristics (MissionBox staff, 2020):

- Has a clear and obvious purpose

- Covers key logistics
- Makes taking action easy
- Provides links to social media
- Is mobile friendly
- Lists up-to-date content and processes
- Is clearly laid out and easy to navigate
- Appeals to human emotion
- Allows for analytics for ongoing improvement

Also, consider partnerships with other institutions offering services to potential learners, such as libraries, employers, social service agencies that do not offer educational programming, or community-based organizations that want to provide educational services but do not have the resources or expertise. Ask them if they will link to your program from their websites. This type of organizational partnership supports an equitable digital ecosystem, which can open doors to further collaboration that benefits your learners and program (Digital US, 2024).

Learners who find you through these websites are clearly interested and have at least sufficient mastery of the technology to find your program. Adding online engagement tasks to your website allows learners to signal their interest in learning more (e.g., using scheduling tools such as Calendly) or to start a registration process (e.g., using tools such as Google Forms) while also demonstrating digital skills needed for online learning. Once the learner has contacted the organization, an in-person meeting can be arranged, at which time the learner can be pre-tested (according to National Reporting System guidelines), talk about goals, and determine whether distance education is an appropriate match for the learner's educational goals and abilities.

Recruiting within Workforce Development Agencies and Partner Organizations

The Workforce Innovation and Opportunity Act (WIOA) (2014) 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 to 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, 2015. These plans are 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 way to enact inter-organizational collaboration.

Additionally, the language of Title II (the component of WIOA that defines adult education) Sec. 223 calls for state leadership activities to support "alignment" activities, naming one-stop partners (federally funded organizations that help adults find employment). Specifically, the act calls for provision of career pathways programming and is explicit about the need for collaboration across organizations.

Collaboration between an adult education provider and American Job Centers in Northwest Michigan has grown beyond recruitment to an on-site blended learning program supported by braided funding. An ABE teacher works regularly at the American Job Center and, because job counselors there know the teacher is onsite, there is a steady stream of new ABE participants.

Because these agencies are now required to provide educational services to low-literacy adults (Bird et al., 2014)) and many are doing so for the first time, they will perhaps be open to participating in recruitment of distance learners within their client (also called "customer") lists. These workforce development agencies may be looking for the expertise of adult education practitioners, and the customers they serve might welcome information about ways to build skills and knowledge while they are also seeking employment.

Finally, understanding the categorization of allowable activities and what is funded in the different sections of WIOA could help adult education programs collaborate with organizations funded under the other "Titles" of the act. For example, Title IV, 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 IV 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" (LEAD Center, 2015). Adult education could potentially partner to provide that training. For example, the limited time a learner is available to be somewhere in person could be focused on the technical skills part of a job training program, whereas the academic supports needed for things such as high school equivalency completion could be managed and delivered by adult education via distance education. Since there is no specific dedicated funding for special needs in Title II (the part of WIOA that addresses adult education), partnerships with Title IV funded programs could be fruitful for all involved.

This has worked well in northwest Michigan. The WIOA Title II adult education provider is housed inside an American Job Center, alongside all other titled funding sources. Sharing a location together has supported much collaboration. For example, to support a learner having difficulty passing a GED® test without accommodations, the education provider partners with the Title IV provider who pays for the costly identification screening. In another example, a high school graduate who has basic skills needs participates with the support of both Title II and IV programs to build skills education and get job counseling and training needed to obtain employment. In this case, Michigan Rehabilitation Services conducts on-the-job training, while the adult education provider concurrently provides the basic skills training specifically targeting skills needed in the chosen job.

Planning for Learner Recruitment

Activity 2.1 Characteristics Supporting Student Success

Think about what skills, experience, and dispositions learners will need to be successful in your distance or digital education programming, based on the curriculum and materials you will be using and your programmatic goals for distance and digital education goals.

To get started, think about how you will handle the tension between finding new learners who are likely to succeed given the resources and activities you offer and the need to support "all comers." Consider the details for a new distance or digital opportunity you will be offering. List course-specific requirements, and for each one, describe the material and technology learners need to possess to be

successful. The more specific you are in detailing what you think the learner will need, the more focused you can be in your recruitment for this course.

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 and Digital Education, these prompts are expanded into fully developed collaborative activities for your team to complete together.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Chapter 3

Assessing Readiness

Determining What Supports Students Need to Succeed in Distance and Digital Education

Introduction

There are several reasons for starting to offer a range of new distance and digital education programs. You might want to use a hybrid approach to intensify learning for current learners. You might also decide to offer a new complementary online component to your in-person class for blended learning, or create a HyFlex class to provide a learning option for learners who cannot make it to regular class times. While all are good reasons to start using distance and digital education, without careful coordination and proactive planning for providing support, you may not have the resources to provide all learners the support they need to persist.

What can happen is a churn of orientation for new learners, constant follow-up to connect with learners who are not participating, and, if it's a distance education course, extra work to exit learners who have not been regularly participating. Past IDEAL member states all seem to have stories about how this scenario played out and eventually impacted 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 to facilitate learners' learning. In reality, there is sometimes a disproportionate amount of time spent on administration and keeping track of learners. To mitigate this, programs need to be sure they understand the level and types of support that each learner needs and the plans to provide it. Implicit in this strategy is the need to understand the readiness of potential future learners. This readiness is characterized by learner strengths in several areas, including:

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

While the work adult education agencies did to provide emergency remote instruction during the COVID-19 pandemic showed us that learners of all levels can participate in distance and digital learning, it is worthwhile to determine which learners are best served by the difference distance and digital education models offered at your organization, what skills and access learners need in order to participate, and how you can set these learners up for success. It is helpful to learn from past and current practices your organization uses to assess learner readiness and expand upon them to help you determine which learning modalities and materials best align with learners' competencies and needs. Then you are better equipped to provide the supports necessary for learners at all levels to boost persistence in educational opportunities.

The Importance of Assessing Readiness

"Once we had to move all of our services online, we quickly realized the importance of assessing our learners' readiness for online learning. Staff helped learners to determine what access they had to technology and enrolled learners in our device loaning program if they didn't have access to technology at their home. We also assessed their digital literacy skills and made sure that learners left knowing how to use the technology we were providing. We also covered soft skills needed for online learning during our 'Digital Boot Camp.' This helped to set learners up for success with online learning."

– An adult education teacher in California

Alignment of Learner Knowledge with Proposed Curriculum

It is important to determine the skills a learner brings to the learning experience (e.g., reading proficiency, digital skills, positive experiences with technology use). First, this requires that instructors be familiar with the objectives of a course and the skills and competencies needed to engage with the curriculum and instructional materials. Second, teachers need to examine a learner's academic skills and knowledge, which can be done with a formal assessment tool (e.g., TABE, CASAS, BEST), customized placement assessments, 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). Seminole State College has created this oral assessment to help with determining placement and learning needs for their ESOL learners.

Teachers who deliver instruction for blended, HyFlex, or hybrid learning and see learners in class, will likely have an understanding of their learners' academic readiness for the online activities needed to do coursework. Teachers supporting learners working completely remotely and independently need to be sure learners have the academic skills needed to handle the work. Assessing learners prior to instruction helps ensure the program is a good fit for learners' needs and abilities.

Aligning to Your Learners

"We created academic placement tests based on the objectives of our program curricula. We do the whole thing using the telephone, WhatsApp, and Zoom. Starting with an intake survey, we then move to an oral placement. If they are at a high enough level of English language proficiency, they also get a reading placement. The same staff person does all of the assessment."

– Carlos Rosario International Public Charter School in Washington, DC explains how they assess learner competencies at a distance

Most organizations already have a system in place for assessing new learners, but current assessments should be expanded to measure a learner's capacity to use technologies—either in class or in online independent work. Some organizations require a particular assessment tool. The more closely placement assessments match the curricular content and skills required to access learning, the more useful the process will be. (For more information about assessment and adult education distance learners, see the original Project IDEAL Working Paper No. 1: *Assessment and Accountability Issues in Distance Education for Adult Learners* (Young et al., 2002). Although published over 20 years ago, it still has relevance today.)

Assessment of Nonacademic Competencies

Learner persistence and success in distance and digital education depends on more than learners' academic skills and knowledge. Distance, blended, hybrid, and HyFlex learning require that learners are able to organize their time, work independently, have good study skills, and solve problems using technology. These nonacademic skills become very important in distance education, 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 via telephone, email, online learning features, or videoconference.

Additionally, depending on the distance and digital education modality used, distance students may have little or no in person contact with other students taking the same course. This means distance students need to possess the characteristics (e.g., independence, self-motivation, organization and study skills) that enable them to succeed without the extra support a classroom environment typically provides. Thus, early in program orientation or the assessment process, 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 and Skills That Matter

Habits of Mind have been defined as the behaviors required to support learning and successful application of the knowledge that students already possess. Costa (2008) lists 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

The Habits of Mind Self-Assessment Rubric created by the Institute for Habits of Mind (n.d.) provides a means to informally gauge these soft skills and can be used as a guide to help teachers and learners together determine readiness for independent work.

These habits come into play when a learner faces a challenge or needs to solve a problem. Such events require a learner to creatively draw on prior knowledge and not give up. Many of these habits are encompassed in the Teaching Skills That Matter in Adult Education, a project of the U.S. Department of Education, Office of Career, Technical, and Adult Education (OCTAE). These are the transferable skills required for success in daily life, work, and school.

- Adaptability and willingness to learn
- Communication
- Critical thinking
- Interpersonal skills
- Navigating systems
- Problem solving
- Processing and analyzing information
- Respecting differences and diversity
- Self-awareness

The free application SkillBlox offers digital playlists of resources that are tagged with these skills. Teachers can use SkillBlox to locate resources to bring into their instruction, or create a "Blox" and assign it directly to students. World Education's Personal & Workplace Success Skills Library offers a wealth of information about teaching and assessing such skills. The library is a collection of resources to guide the integration of personal and workplace success skills into curriculum and instruction, advising and coaching, assessment, and program design. These resources were selected for adult education, higher education, workforce development, and career and technical education programs serving adult and older youth learners and workers, including English language learners.

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 D 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.

YWCA National Capital Area Learner Readiness Survey: This short survey was developed in Google Forms specifically for intake in adult basic skills programs. It covers a range of readiness areas, including study environment, time available for distance learning, access to devices and the internet, and how students problem-solve.

YWCA National Capital Area Motivation Inventory: This short survey may help you understand a learner's current motivation and commitment to working independently. You could use the survey results as the basis for a conversation during an intake session.

Penn State Self-Assessment: This brief quiz asks questions about time management, study skills, personal organization, and technical skills. The quiz offers feedback that teachers can use as the basis of a conversation about readiness.

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 is a valuable component of orientation for distance and blended learning students. We encourage you to explore the resources above, 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 organization has Adobe Acrobat Pro, you can use that to create forms that automatically transfer gathered information to a response file.

Digital Literacy Skills

Foundational computer and mobile device 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. 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 essential information. Digital skills needed to study online include:

- Using a mouse or touchpad 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
- Using their smartphones to access websites, download applications, and use phones to read or complete assignments
- Being able to connect—and stay connected—to the internet
- Navigating web pages, including using the back button and managing new tabs in browser windows
- Composing and replying to texts and emails
- Logging in to programs
- Retrieving passwords
- Uploading files

Assessing Digital Skills

Some sort of digital skills assessment is useful to help teachers understand a student's digital skills gaps—not to screen them out of digital education but to understand what tasks they are ready for and what skills they need to build. Some sites have opted to observe students' computer use at an orientation as an informal assessment of their computer skills. It may be helpful to develop a quick checklist to assess learners" computer skills. The EdTech Center @ World Education created a digital literacy self-assessment tool that can be adapted to meet the needs of your learners. This digital skills and access survey created by an IDEAL adult educator can also be customized to be updated to better align with the skills and devices you know you would like your learners to possess. Briya Public Charter School in Washington, DC, created another excellent example. Educators there went through a comprehensive process of identifying the skills that learners needed in order to effectively participate in remote instruction based on the technologies that had been put in place for delivering instruction and developed this checklist to support educators and learners in tracking skills to ensure learner readiness.

Such checklists could be used to support an informal assessment as learners are using an online curriculum in person. This allows the teacher and learners an opportunity to determine if learners have the necessary digital skills to use the online program. It also gives learners a chance to decide if they are comfortable with this educational approach and 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).

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 one 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 have good reading and organizational skills, there is a questionnaire that students take to see if they will be successful in said program."

– A distance education teacher in Arizona

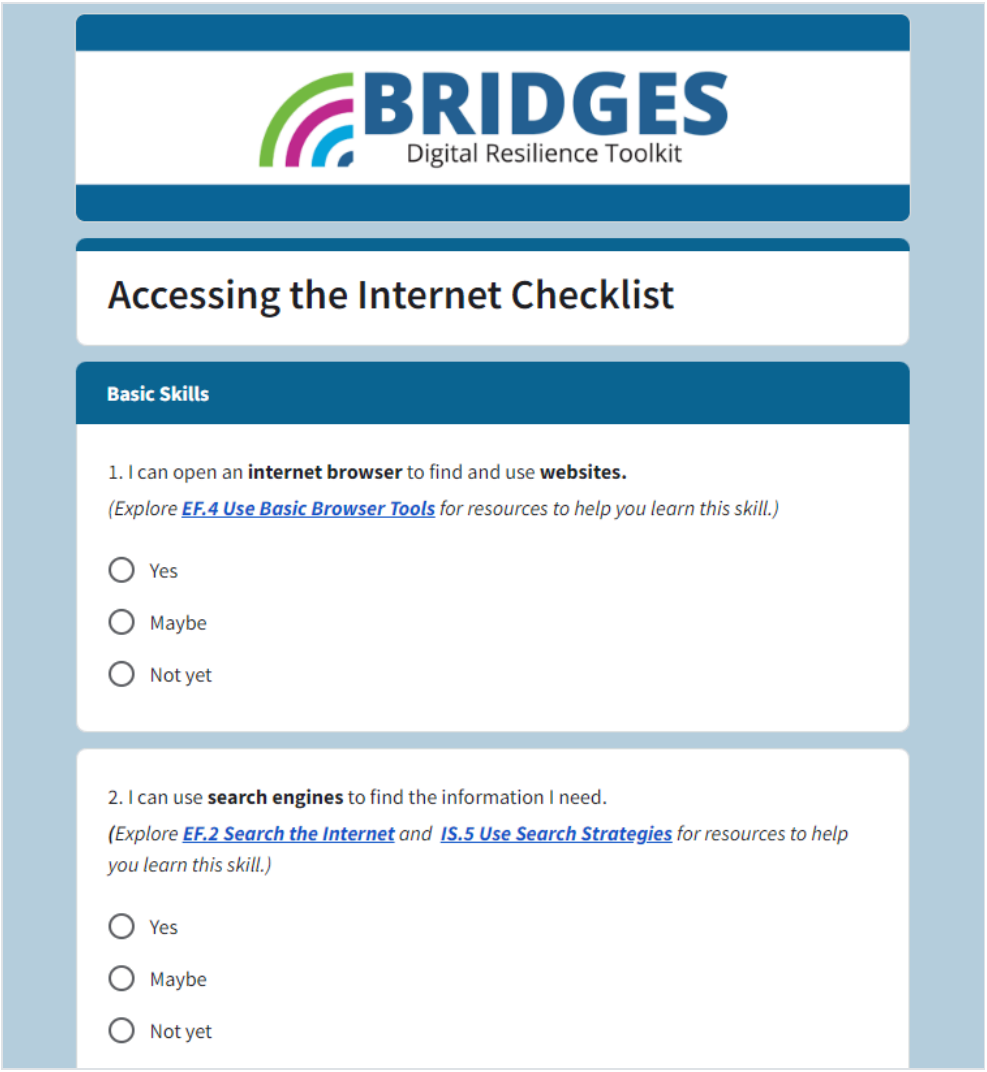
A more comprehensive list of skills is outlined within the BRIDGES Digital Skills Framework. This framework is designed to help "bridge" inequities learners who have had limited access to technologies may face because of the necessity for their use to accomplish common tasks in work, schooling, and daily life. The BRIDGES Digital Skills Framework includes 75 skills across 10 domains organized into these three overarching categories and subtopics:

Gateway Skills: foundational skills required to use a device and participate online.

- Mobile: Understanding basic functions of a mobile device to communicate and access goods and services.
- Device Ownership: Practices that support device longevity, including physical care, protective software, and using technical support.
- Privacy and Security: Maintenance of practices to secure digital identity, recognize threats, and understand the broader safety implications of working in a digital environment.

Productivity Skills: Skills needed to leverage technology to communicate, create, and share content in personal, educational, and professional contexts.

- Communication: Exchanging information with others on digital platforms using various strategies to collaborate, share, and communicate.



- Creation: Engaging in digital spaces to design, create, and revise content online.
- Workplace and Productivity: Advancing workplace success and professionalism through engagement with an organization's online tools and other supportive digital systems.

Independent Learning Skills: Skills to support finding information, performing everyday tasks, and participating in continuous learning within an increasingly digital world.

- Information Skills: Skills to apply, evaluate, and manage information across digital and physical environments.
- Lifelong Learning: Engagement in self-assessment of digital skills. Using self-reflection to tailor accessible digital environments and continue learning.
- Online Life: Access to online resources that support digitalization of daily tasks and socialization within a broader digital community.

The framework is part of the broader BRIDGES Digital Resilience Toolkit, which includes a variety of checklist templates that can be adapted to self-assess and monitor learner progress around sets of skills relevant to common goals. These checklists are organized by a variety of user types, as well as based on the specific goals of individual users, so they can be used and adapted by teachers and learners to self-assess and to monitor learners' skill strengths and gaps. BRIDGES also includes instructional resources and supporting guidance to help teachers shape digital skills instruction that will help learners build digital literacy.

Many adult education programs and libraries across the country use the Northstar Digital Literacy Assessment to understand learner competency with essential computer skills, essential software skills, and technology use in daily life. This popular and free digital literacy assessment was developed specifically for use with adult learners. The standards on which the assessment modules are based were developed by librarians and adult education and workforce development practitioners. Each of the available assessments takes about 30 minutes to complete. Programs could choose which assessments are most relevant to their learners' goals and the distance education program.

For students who need additional skills prior to beginning the distance education program, or help along the way, the organization may choose to provide training (for example, running a one- or two-session class on basic computer skills to help them get started). You may wish to do an analysis of the online materials that are used in your distance and digital education and then focus training on the skills needed for student success and persistence. Some popular and free learning sites are GCFGlobal, the Public Library Association's DigitalLearn.org, Google's Applied Digital Skills curriculum, or this computer basics module from Northstar Digital Literacy. These and other resources are all included in the Digital Skills Library, part of the BRIDGES Digital Resilience Toolkit.

Computer and Internet Access

In a classroom setting, educational materials and technology are sometimes made available to the students (e.g., computer labs, tablets, and the internet). Organizations are also likely to employ someone who is knowledgeable in those technologies and who can help teachers and students use them. Students who cannot come into the organization 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, organizations must problem-solve to provide students with access to all of the materials and technologies they will need to get the most from their distance studies.

Some organizations 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 Rhode Island Family Literacy Initiative (RIFLI) lends tablets and mobile hotspots to enrolled learners who do not have home access. If you create a lending program, you will likely need to set up technology lending agreements with your learners. The Dover Adult Learning Center Laptop Loan Agreement is an excellent example of what needs to be included.

There are also programs that support national digital inclusion efforts and low(er) cost home broadband connections. EveryoneOn has a tool to help identify local offers. Lifeline Support is a benefit program to help households purchase broadband and devices. More options for support will likely be available as the initiatives funded by Digital Equity Act, a large federal investment launched in 2024, start running. .

The need for access to digital devices and the internet was brought into stark relief as programs shut down around the country because of the COVID-19 pandemic. Indeed, a survey of nearly 800 program administrators and instructors across the United States showed that digital access was the main barrier to participation in learning. Programs that had already put into place processes and resources for loaning devices and internet access were able to continue supporting learners without resorting to paper packets (Belzer et al., 2020). The following are some promising initiatives to address digital exclusion issues in the United States.

- The National Cristina Foundation has launched a nationwide call for surplus computers from corporate or governmental sources. It then matches donors with nearby refurbishers, who in turn prepare and distribute the equipment at low or no cost to organizations in need.
- Tech Goes Home (TGH) is a nonprofit with initiatives in five cities that provides training to help learners of all ages use the internet and computers. In TGH cities such as Chattanooga, TN, participants who complete a 15-hour digital skills training are offered an extremely low-cost laptop. TGH also provides directories, localized curriculum, and guides to common digital tools and resources.

Many programs also began employing Digital Navigators who provide a comprehensive approach to ensuring learners have both digital access and the digital literacy skills needed to use the devices. Digital Navigators are dedicated staff or volunteers who focus on digital equity and literacy. The Digital US *Digital Navigator Resources* website features tools that Digital Navigators or other practitioners can use to meet the needs of learners. More information on Digital Navigators and digital navigation services can be found in Chapter 4.

To get a sense of your learners' technology access and digital literacy and digital literacy needs, consider adding a self-assessment that asks about access, skills, and comfort. This *Distance Learning Technology Access Survey* from the YWCA National Capital Area can be delivered over a mobile device. You might print the survey for learners who don't have access to a digital device. One agency in California worked with their proctors to administer paper versions of the Northstar Digital Literacy Screener during Comprehensive Adult Student Assessment Systems (CASAS) assessments to help teachers understand their students' digital literacy levels and help the administration plan its schoolwide digital literacy strategy.

Defining Learner Readiness

Activity 3.1 Screening and Learner Readiness Checklist

Describe how you will measure a range of readiness characteristics and respond if learners require further preparation to succeed in online learning.

Consider the needs of your learners, resources available, and administrative processes at your organization. Then develop a list of readiness characteristics that you will use to determine the supports needed for learners to successfully participate in your distance and/and/or digital learning opportunities.

Note that in the course, IDEAL 101: Foundations of Distance and Digital Education Foundations of Distance and Digital Education, these prompts are expanded into fully developed collaborative activities for your team to complete together.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Chapter 4

Orientation

Setting Up Learners for Success

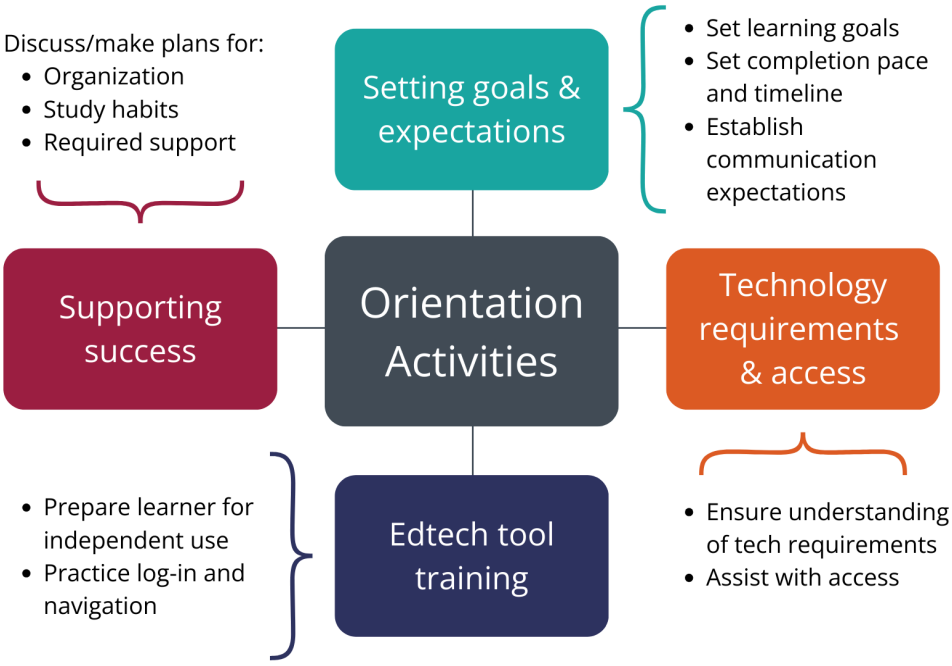
Introduction

Many educators who provide distance and digital education 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 through activities that prepare learners for a successful and positive experience. Even if it is conducted remotely via video conference calls during the orientation, learners 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 online program or digital learning activities are a good match for learners' interests and abilities, determine if they have the requisite skills to succeed, and make decisions about how to support learner persistence.

Orientation can also be a time when teachers help students set goals for participating in a distance program and clarify expectations for course participants. Study skills, strategies for working independently, digital literacy skills, and digital resilience 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).

Elements of a Solid Orientation

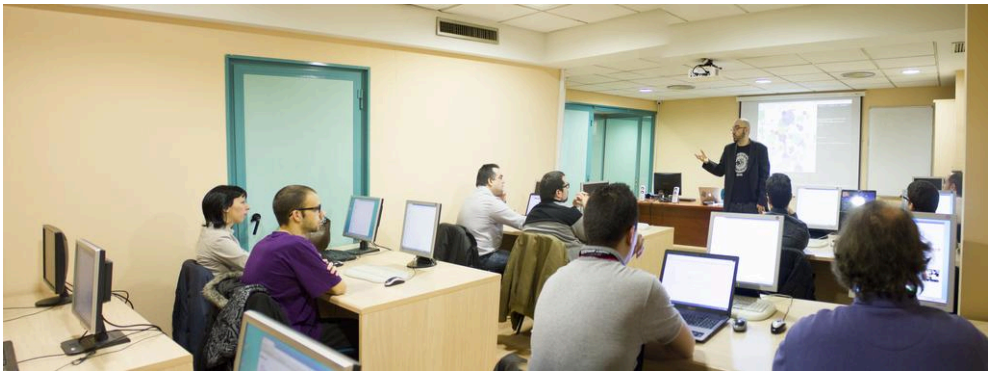
Some elements of a dedicated orientation for distance learners are similar to what typically occurs for in-person classroom programs. Teachers and students are introduced, students learn how to use curricular materials and digital tools, and course requirements are discussed. Orientation must also include activities that establish realistic expectations for distance, blended, hybrid, or HyFlex study and provide learners with a sense of how their learning experience will proceed. Additionally, the activities to assess readiness in Chapter 3 generally occur during orientation. The activities that should occur during an orientation session include:



Covering these topics is particularly important because although students have an idea of what is likely to happen when they step into a classroom, they may not have relevant history or experience with distance education.

Duration and Structure

How long should an orientation be? This depends on what your organization determines it needs to include. Some organizations may decide their learners will be prepared after a single four-hour orientation. Others may decide that students need a more comprehensive, multipart orientation adding up to six or eight hours. A few organizations have created orientation programs lasting 12 hours (at which point the students can be officially designated as distance learners in NRS reporting; see National Reporting System for Adult Education, 2024b). Each organization should determine how to structure its orientation to best prepare learners.



Adult education programs have offered both group and individual orientations for learners. Group orientations are more efficient for the teacher and allow the learner to meet others who will be working at a distance or in supplemental hybrid courses. If digital education like blended or HyFlex is the focus, this orientation could take place as part of the in-person class. This 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 learners who might need individualized support to prepare for studying online. Many programs offer orientation via video conferences. Using this technology, teachers can orient either a group or individual student to distance and/or digital learning no matter how far they are from the school. Whether in person or on a video conference call, programs may consider offering a portion of the orientation to a group and reserving a portion for individual support.

The rest of this chapter explores the following topics:

- Identifying and assessing learner goals
- Setting expectations for the class
- Determining technology requirements and learner access
- Teaching digital skills and building learners' digital resilience
- Orienting learners at a distance

Identifying and Assessing Learner Goals

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

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 pathway plans. This will help us support better transitions to the workplace and postsecondary education.

– A teacher in Pennsylvania

Educators should look carefully at ways they can use goal setting to help guide their instructional planning. Asking questions about goal setting means going beyond information required by the NRS–obtain a job, earn a high school equivalency diploma, improve literacy skills(See National Reporting System for Adult Education, 2024b). 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, 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 learners' needs. They can help the teacher select the appropriate materials for students and provide more tangible, incremental milestones. Additionally, it may be helpful for the teacher to periodically revisit the goals with students. This allows the teacher and learners 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 the dated but still useful Project IDEAL Working Paper No. 3, *Using Assessment to Guide Instructional Planning for Distance Learners* (Petty, 2004) for more about this topic.)

Goal setting may be a new concept for your learner; adult education students come from many backgrounds and experiences, some of which do not focus on goal setting. Provide clear guidance to students as they learn to set goals. These goals may also need to focus on good study habits that learners will adopt during distance and other digital education opportunities. Be prepared to be supportive and provide guidance for learners.

Here are examples of goal planning resources.

- Learner Goal Setting Forms – ESL Workplace Context

- Learner Interview Goal Setting Form – Any Context

Setting Expectations for the Class

Orientation is the ideal time to clearly communicate the expectations for the distance learning class or the independent online portion of a blended, hybrid, or HyFlex learning. This ought to include what the learner 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. The questions that follow are designed to guide teachers in setting expectations for learners.

Level of Structure

One of the first things to establish 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 their own. Make sure the answers to the following questions are included in your orientation.

- Are there due dates for completing work?
- Does this vary depending on the learning resource being used?
- If there are self-directed online or non-digitized options for student learning, how and when will they be made available?
- How will they be submitted to the teacher?

Feedback and Expectations

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

- How does the teacher respond to learners? In separate meetings? In class? Asynchronously and online?
- 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 largely at a distance. Be sure your learners know how you will help them gauge their progress.

- Are learners 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. In your orientation you need to 1) set expectations around how assignments will be communicated, and 2) gather learners' preferred modes of communication (e.g., email, text, phone call).

- **Will you be communicating online?** Make certain that both the student and teacher have each other's email address, chat app username (e.g., WhatsApp), or Google account info for Google Meet. Make sure the student knows how to access an email system or the videoconferencing tool. If a learner does not have an email account, be ready with a current list of free email providers and a tutorial on how to create an email address.
- **Will you be 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. Using a Google Voice number or applications like WhatsApp or Remind make it possible to send text messages without sharing a telephone number.
- **Does your communication method respect learners' privacy?** For example, learners can view other learners' phone numbers in WhatsApp. Is that a concern for learners, and if so, would an alternative like Kik be a better tool for group messaging?
- **Will you have virtual or in-person office hours?** Identify when and where these will be held, taking into consideration that using web conferencing provides flexibility that helps overcome traditional barriers to learner participation. 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 via Zoom, Google Meet, or Class Collaborate.

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. The contract spells out the specifics and requires a student's signature. A contract helps keep the learner 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.

Explore: Adult Distance Learner Agreement from Northern Shenandoah Valley Adult Education.

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. Presenting clear, specific expectations for all parties involved before the start of the class ensures things will operate more smoothly throughout the class period.

Explore: Learning Lab Student Hot Spot/Chromebook Use Agreement from Northwest Michigan Works.

Determining Technology Requirements and Access

New students need to know how to access learning activities and how and where they can access a device and internet connection if they do not have them 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 both accessed and realistically operated on them. If you are conducting your orientation completely remotely, start by using technology that the students feel comfortable with. For some students, this might be a phone call. Many students already have WhatsApp, so you might use that as a way to send demonstration videos that show how to use other technology tools that will be part of the learning experience.

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 for accessing the online component of a curriculum, address of a website linking to supporting online activities) for later reference.

Digital Navigation Services

According to the *Digital Navigator Playbook* (Digital US, 2019), Digital Navigators “provide accessible and individualized supports to millions of Americans to connect them to the internet, devices, and assistance accessing information and services and accomplishing their goals online.” Instead of being offered as a standalone service, Yamashita and Webber (2023) suggest that digital navigation is most successful when integrated with existing services, such as those provided in community centers, education, employment assistance, healthcare, and libraries. In some organizations, such as adult education providers or workforce development programs, participants are trained to serve as "Peer Digital

Navigators" to provide digital inclusion support to their colleagues, classmates, and community members (Webber & Yamashita, 2023).

Whether they are dedicated staff, community volunteers, or program participants (such as students), Digital Navigators working in an adult education setting may provide support in the following ways (Yamashita, 2022):

- **Troubleshooting Technology Issues**: Digital Navigators can help troubleshoot technology problems faced by staff and students, freeing educators' time to focus on teaching and removing technical barriers to students' learning.
- **Providing Support and Training**: Digital Navigators can offer support and training to staff and students on tech-related issues such as Google Classroom enrollment, Google Workspace orientation, internet connectivity, student email access, and Zoom functionality.
- **Language Support**: Multilingual Digital Navigators can provide language support for students, especially those enrolled in English Language Development programs, to remove technology-based barriers for students with lower literacy levels in their preferred language.
- **Managing Technology Distribution**: If your agency provides technology—whether through the organization's lending library or periodic giveaways through a partnership with a local refurbisher—Digital Navigators can support distribution efforts, ensuring students have the necessary onboarding to use it effectively.
- **Professional Development**: Digital Navigators can facilitate professional development workshops, focusing on specific topics related to educational technology and providing hands-on training and Q&A sessions for staff and students.

Teaching Digital Literacy Skills and Building Learners' Digital Resilience

A well-designed orientation not only trains students in the skills they need to be successful with the learning activities, it should also introduce learners to the concept of digital resilience.

Digital resilience is defined by Digital US (2024) as "having the awareness, skills, agility, and confidence to be empowered users of new technologies and adapt to changing digital skill demands." One way that adult educators can focus on building digital resilience is to shift from teaching specific digital skills to building learners' confidence and ability to adapt and use new technologies (Jobs for the Future & World Education, 2022). Here are some examples of how this can be done starting at orientation:

- Praise students' efforts and persistence in using technology.

- Connect how discrete digital literacy skills, such as logging in, can be used in different contexts.
- Set the expectation that technology issues may occur so learners aren't discouraged when they encounter them.
- Discuss problem-solving and trouble-shooting strategies with learners.
- Highlight skills students are currently using and demonstrate how those skills can be transferred to technology used in the distance education class.
- Model resilience whenever possible during orientation and instruction by patiently troubleshooting if/when you run into tech problems.

Some popular, commercially licensed curricula make orientation materials available. These resources may have too much information for every learner, but they illustrate the breadth of skills required for successful engagement in online learning activities. If you find you need to modify existing resources based on the information provided, internet searches for other program's materials and using GenAI may help you more quickly produce resources for your learners. You could also cover all the required information in a PowerPoint or Google Slides presentation or short video that could be posted on your organization's website so that students can go back and review it.

For learners with emerging English skills, you may need to make additional effort to orient learners to the technology. St. Paul Adult Basic Education has created several videos, including Zoom and Google Classroom help, in multiple languages. A California adult education program creates technology guides that are picture-based and include minimal directions and basic vocabulary.

Orienting Learners at a Distance

Fully Distance Programming

Most of this chapter has discussed orientation from the perspective of programs that conduct in person orientations for distance and digital education. However, some states have pure distance education programs where the majority of instruction is delivered at a distance. Learners find these programs either online, through a statewide referral service, or through another referral source. These students may complete intake, assessment, screening, and orientation in person at a local adult education organization. Learners may also complete additional orientation activities at a distance. This may be done synchronously through video conferencing as well as asynchronously using online activities.

For example, some Pennsylvania agencies use video conferencing tools 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. In Missouri, students complete online activities that walk them through the steps of developing a distance learning plan and explore the curriculum. Distance teachers in both states support students throughout the orientation.

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

Remote Orientation When In-person Is Not Practical

There are times when it is not possible to meet in person. This could be due to health-related issues, geographic distance, or barriers to in-person attendance. The National Immigration Forum supported development and implementation of a completely remote workplace ESOL class, which included a robust remote onboarding and orientation process.

Important features of the onboarding included starting communication with phone calls and texting to ensure that students could access the videoconferencing tool and then using that tool to introduce the course Moodle site and other learning technologies. To introduce each technology, teachers provided incremental and highly visual and proactive guidance, and were available for tech support that was often provided in a learner's home language. You can read more about this effort in their report, *Upskilling New Americans: Innovative English Training for Career Advancement* (Murray & Negoescu, 2019).

Similar steps proved effective for countless programs that moved their instruction rapidly online because of the pandemic. A common pathway for introducing technologies began with a phone call, then a transition to WhatsApp (or another messaging tool), then to Zoom (or another video conferencing tool), and finally to other educational technologies (edtech) that enhanced engagement and communication.

Although it is possible to orient students completely at a distance, it is important to ensure some face-to-face time during orientation, even if that is via videoconference. Face-to-face

orientations, especially those done in person, are consistent with the growing preference for using a blended model 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. Students should be supported by a distance teacher as they work through these activities.

NRS Requirements

As of 2024 the NRS allows for "Alternative Placement" so pre- and post-testing might not be required in your state.

> *"New rows have been added separately for the ABE and ESL sections on Tables 1, 4, 4A, and 4C to accommodate the new placement flexibility allowed for programs designed to result in MSG types other than EFL gains based on pre- and post-testing using an NRS approved assessment (MSG Type 1a)" (National Reporting System for Adult Education, 2024a).*

This change will likely make orientations provided completely at a distance easier, but such orientations may yet be possible if your state has decided to stick with monitoring learner progress through NRS-level gain. Though several states allow for remote test administration, standardized testing required for this is easier for programs to accomplish in person and may feel less invasive to students who are reluctant to video monitoring often required for at-home testing. Some states have made arrangements with local libraries and community-based organizations to disburse students across settings in order to accommodate proctored assessments with social distancing during the COVID-19 pandemic. This strategy is still relevant today to allow proctored assessments in locations closer to students' homes.

Orienting Learners at a Distance

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 digital education program. How can you begin to increase learners' digital resilience?

Activity 4.2: Elements of an Orientation Plan

Begin to lay out the elements of an orientation plan.

List the components you want to include and describe how you will implement each of them. Your plan should be geared toward the pilot you are working to build for this course. The goal of this activity is to have a plan you can put into action with all of 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 and Digital Education, these prompts are expanded into fully developed collaborative activities for your team to complete together.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Chapter 5

Instruction

Introduction

Digital learning in adult education, whether it happens in class or at a distance, is ever-evolving. These changes are due to more widespread availability of free and licensed edtech tools and digital education products, along with increased access to learning made possible by mobile devices. This evolution in digital education accelerated dramatically in response to the COVID-19 pandemic, and continues to transform in light of recent technological advancements, particularly new access to tools that leverage GenAI. Across the United States, practitioners and professional development providers have come together in communities of practice to share innovative strategies and resources. Much innovation has been hatched in IDEAL Consortium states, buoyed by their past efforts and continued collaboration to implement distance education and stand at the forefront of digital education.

From past experience and research, we know that successfully implementing distance and digital education hinges on the teacher's vital role. Even when learners are working independently and perhaps even benefit from feedback and support through an online curriculum or AI tutor, teachers serve as an ongoing resource and guide to learners. This chapter introduces an approach to distance and digital education that encompasses what we have learned from IDEAL teachers and the opportunities made possible by new technologies.

While new technologies emerge in tandem with new approaches to teaching and learning, the reality remains that many adult learners may not have experience with distance or blended learning and may not yet be comfortable using technology in this way. On the flip side, the technologies themselves have limitations, are susceptible to damage and glitches, and cannot anticipate and be responsive to the human aspects of learning. Teachers act as the critical "human-in-the-loop," offering a consistent stream of communication, feedback, and encouragement, even when technology fails. We call this approach *involved instruction*, where teachers are actively engaged in their students' learning—even though they are remote.

Involved Instruction

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

> *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 et al., 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 the "extent to which the instructor is

involved in the 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 ongoing feedback or encouragement. 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 virtual meetings via telephone or video conferencing tools, along with the assignment of supplemental activities to support learning. Teachers can foster further involvement by creating facilitated opportunities for peer-to-peer interaction. (See Appendix E 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 modalities, activities, and communication formats. These technologies make both students and teachers more comfortable working online and increase student motivation and outcomes. Instructional modalities that allow for multiple modes of engagement support flexibility and personalization; online collaborative activities foster community among students because they support each other with both academic content and technical aspects of the online work. Social aspects of educational technology (edtech) tools are great for this purpose. These features integrate familiar social media features into instruction and encourage collaboration and peer learning. Prior research shows that students posting and responding to each other on social media leads to rich interactive learning experiences because, through that communication, learners establish a social presence. They are seen. This is beneficial even for beginning literacy students (Bigelow et al., 2017; Vanek, King, et al., 2018).

Involved instruction supports learner persistence in any modality of instruction—blended, hybrid, pure distance, or HyFlex—where the instructor takes on the role of a facilitator. An online curriculum and supplemental digital materials become resources, not just the sole means of instruction. As a facilitator, an instructor mediates between the learner and the online content, personalizing learning. Because an instructor is more present, they can provide support and learning activities that best suit a learner's needs. An excellent example of this is found in the work of Delgado Community College in Louisiana. Instructors at Delgado created an online curriculum that is used by teachers across the state as a basis for instruction. Using Google Classroom, Slides, and Docs, teachers are able to respond to learners' work and assign supplemental resources as needed. Students developing proficiency with distance learning through this supportive approach can build the confidence and digital skills they need to succeed (Sharma et al., 2019).

What does involved instruction look like? In 2015, a Project IDEAL instructional strategies study group convened under the leadership of Dr. Jere Johnston to explore the state of distance education instruction and to describe the teaching practices identified as "successful" by states' distance education leadership. The study group members interviewed the teachers and noticed similarities in their work that illustrate how to provide involved instruction. Common practices of these innovative teachers included the following:

- Used blended learning, even if they needed to work completely remotely with learners
- Focused on using one primary curriculum
- Provided supplemental learning activities and resources when learners required more instruction
- Organized online learning using a digital homeroom, a website hosting links to all learning activities
- Adopted technology tools to suit instructional and content needs
- Made use of computer labs where they were teaching
- Continued to learn themselves

The full report from the group is called *New Models for Distance Classes in Adult Education* (Johnston et al., 2015). In the rest of this chapter, we take key strategies and models from

this study and combine them with more recent research, giving you more ideas about how to provide involved instruction.

Involved Instruction in Action

"I set up small WhatsApp groups to give students a space to ask each other questions or build community. Many already had WhatsApp, so it was easy to get started."

— A teacher in Texas, explaining how she established communication with her students after school closures in response to COVID-19

Blended Learning

There are distinct benefits to blending synchronous and asynchronous learning opportunities to accommodate the needs of adult learners. Some very useful research defining blended learning and examining models for its implementation has been conducted in K-12 and postsecondary settings. The Clayton Christensen Institute defines blended learning as:

> *a formal education program in which a student learns at least **in part through online learning**, with some element of student control over time, place, path, and/or pace; at least **in part in a supervised brick-and-mortar location*** away from home; and the modalities along each student's learning path within a course or subject are connected to provide **an integrated learning experience** (Blended Learning Universe, 2024).*

**In the IDEAL handbook, we consider remote live participation in class time as another possibility for the synchronous component of blended learning. While learners may never come to a brick-and-mortar location, they are participating in traditional classroom learning, albeit at a physical distance, in addition to online learning.*

This approach is effective for adult learners. In Arizona in 2014, adult learners participating in blended learning had 6% higher level gains than those in traditional in-person classes. In 2015, they were 16% higher (Vanek, Stubblefield, et al., 2018). Blended learning offers these benefits:

- **Extends the amount of time spent learning:**
  Learners have more opportunities to engage in learning. For example, if they need to miss a synchronous class because of their work schedule, there are materials for them to study online at their convenience. For learners who have more time, adding more study time outside of class may also enable them to accelerate their learning, especially if the online component is well integrated with the in class curriculum.

- **Supports differentiation and personalization:** Blended learning allows teachers to provide activities at various levels to suit the knowledge and skills of different learners, known as "differentiation." While the synchronous time might be used to build community and a sense of belonging, the asynchronous time can be used for learners to do work that is tailored to their level and goals.

- **Guidance and support:**
  Learners benefit from ongoing teacher support, especially as they navigate potentially new learning habits. Even if the in person component of blended learning occurs remotely, with the teacher present to guide learners through problems,

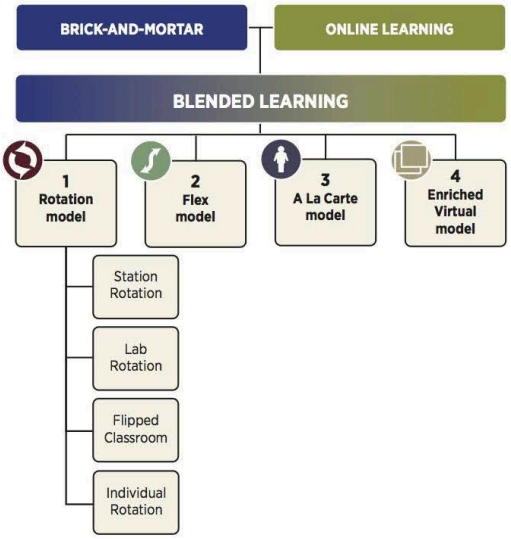
misconceptions, and applications of newly acquired digital skills, adult learners can move through learning material more efficiently and confidently.

- **Peer-to-peer interaction:** In class, conversation and support can prepare learners for online work. Face-to-face conversation and support create opportunities for socially constructed knowledge, where classmates learn from and through interacting with each other. A blended learning teacher could extend this interaction to an online space by periodically requiring learners to work in groups on collaborative projects, which can be completed using cloud-based documents and class communication tools. 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).

Blended Learning Models

This integrated learning experience takes shape in several models, as depicted in Figure 1 from Blended Learning Universe.

Figure 1.



Note: An organizational chart illustrating different blended learning models. Reprinted from Blended Learning Universe, n.d.

These definitions were constructed in the years before the pandemic. It is true that experiences during the pandemic introduced additional considerations to take into account; however, understanding these different models can make ideas that feel very abstract seem more concrete when you are in the planning process. As you consider the following definitions, remember that the IDEAL handbook replaces "brick-and-mortar" with "synchronous," acknowledging that the "brick-and-mortar" component could indeed be taking place remotely using various digital tools.

- In **Rotation models**, students rotate through different activities on a fixed schedule. At least one activity is delivered online. In the *flipped* classroom, instructional content is delivered online for students to complete asynchronously. Then, when they are in synchronous class time, the lesson activities go beyond traditional lectures to engage learners in opportunities to process, analyze, collaborate, and apply learning.

- In the **Flex model**, students use different learning resources fluidly, as needed. Most resources are online, and teachers provide instruction as needed to supplement online work.

- In an **A La Carte model,** students take a course online with an online teacher and other courses in-person to give maximum flexibility in student schedules. In adult education programs in the United States, this is sometimes called dual enrollment or hybrid learning (Murphy et al., 2017).

- The **Enriched Virtual model** is what many adult education programs may consider supported distance learning, where a student completes most work online and outside of school, and periodically checks in for face-to-face instruction with a teacher.

In their rigorous study of the use of online curricula, Murphy et al. (2017) found three common modalities in use in the sites they investigated, blended, hybrid, and supplemental (See Chapter 1). An important observation from their work is that for an instructional model to be considered blended, a teacher must employ online tools, in-class activities, and instruction as part of a collective whole, where learner work in each setting impacts what a teacher does in the other. More recently, Rosen and Vanek (2020) present descriptions of different blended learning models in *The What, Why, Who, and How of Blended Learning for Adult Basic Skills Learners*. The guide is informed by interviews of adult educators across the United States and offers several cases of blended learning implementation in diverse adult education settings. These examples illustrate why they are employed to meet particular programmatic goals and how they are implemented, making this important reading for any adult education practitioner hoping to start using a blended learning model.

Getting started with blended learning

Rosen and Stewart (2015) highlight these important steps for getting started with blended learning.

1. Know why you are using blended learning.

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

2. Find out about student access to devices and the internet.

Explore your students' access to computers and the internet both in and out of your organization. Rosen and Stewart (2015, p. 32) provide a table (see Table 1) that might be completed by doing an informal survey of your learners and considering your own knowledge about access to computers on-site.

Table 1. Rosen and Stewart's Student Access Summary Table

	School or Program Web Access					
	#/% of students	1. No web access and possibly no computer lab at program or school	2. Web accessible computer lab	3. Computers in class with web access	4. Multimedia projector 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						

Note: A matrix to help assess students' internet access in and outside of school. Reprinted with permission 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 (Johnston et al., 2015). Rosen and Stewart

(2015) also describe useful resources in their book, *Blended Learning for the Adult Education Classroom* (see pp. 10-30). Additionally, there are useful online repositories that link to promising educational technologies. CrowdED Learning's Teacher Tools page lists tools for communicating, finding content, and organizing and managing learning. The EdTech Center @ World Education's WorkforceEdTech.org offers similar resources and includes short case studies showing many of them in use. More resources can be found in the EdSurge Product Index.

4. Choose a learning platform.

Often, as teachers, you don't get to choose your curriculum, but if you do, decide whether a licensed online curriculum will suit your needs or whether you need to build your online resources. Choosing a core curriculum and using supplemental resources is discussed more in the Designing for Distance Education section.

5. Decide on communication strategies and tools.

Establishing consistent, sustainable communication protocols with learners is the best way to support persistence. Reflect on how you will communicate with your learners online. Convenient, streamlined communication is discussed in more detail in the Designing for Distance Education section.

6. Prepare students.

Allow ample class time, or video conferencing time, to introduce students to any new technology and give them a chance to practice with your support. For example, while it is important to help students log in and navigate through the features of a tool, it is equally important to ensure they can successfully access it 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 use to coordinate instruction and communication. (See Designing for Distance Education below.) You might build activities into in-person or live remote 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 the best use of the digital communication tool that you have decided to use.

Monitoring and Documenting Progress

As you work with learners, you will need to monitor their understanding. This can be done in several ways, including informal assessment during class, reviewing learner work and progress, exit tickets, and regularly scheduled check-in meetings with learners. You may need to adjust the pace and/or review content. Just like in-person instruction, ongoing feedback, and assessment can help guide your instruction so that it best meets the needs of learners.

Whether engaging learners in a blended model or 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 responses on quizzes and activities, percentage of assignments done, time spent on tasks, and login/logout times. 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 a Learning Management System (LMS) like Moodle, Canvas, 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 contact hours earned

Using a Database to Track Learner Progress

Tracking Learners' Progress

"Before we started using a database program, 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

Information like this shows 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 accumulation. IDEAL member states have different ways of accomplishing this. For smaller programs, a simple Google Doc or Excel spreadsheet could be used. If you work in a program with several collaborating teachers supporting distance education, you might consider using a Google Sheet 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.

Putting the "Digital" in Digital Education

Strategic Technology Integration

Successful teachers thoughtfully use technology to fit learner needs and content requirements. As tempting as it may be to leap into new resources or technologies because they are novel, you and your students will be better off if you choose technology that authentically enhances your instruction. This is especially important in a blended learning scenario, where teachers need to decide which content is best covered in class or online.

A framework can provide guidance for sorting this out and can help you choose the technologies that fit the learning goals you have for your students. The Triple E Framework,

developed by Liz Kolb (2017), is a useful model that addresses the degree to which a technology resource helps learners meet learning goals. The Triple E Framework is a useful extension of previous technology integration frameworks like SAMR (PowerSchool, n.d.; Puentedura, 2012) and TPACK (Mishra & Koehler, 2006), which focus on how teachers should design learning. The Triple E Framework, rather, focuses on what students do with technology to help them learn. The framework ensures that technology use helps focus student engagement, and then, while engaged, their learning is enhanced and extended by technology. Gaer and Reyes (2020) offer examples of what this might look like in an ABE classroom.

Digital Inclusion and Resilience

Strategic edtech integration and suitable blended learning models are meaningless when digital inclusion and resilience are left out of the picture. The three key components of digital inclusion are devices, connectivity, and skills. Learners must have the devices necessary to fully participate, internet connectivity that supports their ongoing engagement, and the digital skills to navigate, access, and apply their learning using digital tools.

Program support

Many organizations provide on-site 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. Other organizations have mobile carts with devices (e.g., Chromebooks, tablets) that learners can use, while others ask students to bring their own devices (BYOD). Using technology in a computer lab or in class gives learners access to the support of teachers or lab volunteers. The support helps learners develop digital skills while working on their academic content. Many organizations staff labs with volunteers from local colleges who already have digital literacy skills and some personal experience with online learning.

Mobile Learning (mLearning)

A recent Pew Research Center (2024) study shows that the number of Americans using smartphones to access the internet at home is growing. Ninety-seven percent of adults in the United States have a mobile device, and all but 10% are smartphones. Additionally, the demographics of adults who are smartphone-dependent—meaning they can only access the internet on their smartphone—are people of color and/or are living in households that earn less than $30,000 per year (Pew Research Center, 2024). This aligns with the demographics of learners typically enrolled in adult education programs.

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. In this regard, mobile devices can make a big difference. Cell-Ed is an example of content developed specifically for use on standard cell phones. Their 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. USA Learns is available as an app providing a full curriculum for English language learners and applications like the vocabulary builder.

Though many major online curriculum developers 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. Watch out for resources that were made using the Flash software since they will not play on most mobile devices, and most major browsers discontinued supporting Flash assets in 2021. 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, has an accompanying mobile app (e.g., Moodle LMS and Moodle App), or is at least mobile-compatible (e.g., Schoology).

In addition to finding appropriate educational mobile resources and platforms, you can use apps developed to support the facilitation of instructional activities in mobile learning, such as WhatsApp. This mobile messaging app does not require a student to have a telephone and texting plan. Because it works on Wi-Fi and can be accessed in a public place, students only need a mobile device. Teachers can create groups to coordinate cohort learning and send media-rich messages, including images, video, and audio.

Ultimately, 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. The EdTech Center has a bank of resources that can help adult educators use mobile phones (both basic and smart) and other mobile devices to help learners access instruction and other resources.

Building digital resilience

One of the important characteristics uncovered in the study that informed *New Models for Distance Classes in Adult Education* (Johnson et al., 2015) is that educators see themselves as lifelong learners. This is especially important in the area of using technology to support instruction. An embrace of continuous learning not only increases your knowledge of useful instructional resources, it also helps you build the confidence, agility, and skills needed to face whatever technological innovation comes next, a concept known as **digital resilience**.

Creating or maintaining **edtech routines** in your class helps learners anticipate what activity and technology will be used, which can help them build that same digital resilience. An EdTech Center article, *Digital Skill-building by Design: The EdTech Integration Strategy Toolkit*, shares more information about edtech routines and the EdTech Integration Strategy Toolkit, which can help identify technology to use to build these routines.

To unearth commonly used instructional strategies for building digital literacy skills and resilience, the Digital Resilience in the American Workforce (DRAW) initiative conducted a landscape scan of adult educators. The strategies outlined in Table 2 can be a reference as you teach online.

Table 2. DRAW Instructional Strategies For Building Digital Literacy Skills And Resilience

Instructional Strategy	Description	Tips for Doing This
Contextualization and embedding	A learning experience that is taught in a context that is relevant to learners' lives and goals	Teach digital literacy skills within a context that is relevant to a learner, not in a silo.
Choice, relevance, and motivation	A learner-centered approach that allows learners to choose what is relevant to their needs, thereby increasing motivation	Build in choice for learners.
Practice Engagement Theory	Instruction that provides learners with the competencies and confidence they need to successfully go out and practice skills in their real lives (Reder, 2012)	Increase opportunities to practice outside of class.
Strengths-based approach	Instruction that builds on the existing strengths and knowledge of learners	Focus on learners' strengths. Provide opportunities for peer learning.
Differentiated and targeted instruction	Adaptation of lessons to the strengths, needs, and interests of learners and providing instruction that addresses specific gaps in knowledge	Provide opportunities for learners to work on skills to match their needs through blended learning and practice outside of class.
Recycling skill instruction to support the transfer of skills	Instruction of skills across multiple content areas and opportunities for learners to apply skills from one context to another	Demonstrate how skills can be used in other contexts (e.g., filling out forms for school, health, and work). Explicitly teach transferring of skills from one tool to another.
Flexible mindset and self-efficacy	The adaptability and confidence to use technology in existing and new situations	Teach and model problem-solving. Build in productive struggle and failure.

Note: DRAW project staff presented a webinar featuring these strategies (Webber & Harris, 2022); the recording can be found on the EdTech Center's website

> *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).*

Designing for Distance Education

No matter how much experience a learner has using digital tools for learning, it's important to build a learning experience that enables them to prioritize learning. That is, a learner's time is best spent building knowledge and skills rather than going on a treasure hunt for

assignments, materials, and messages. Two things to consider along those lines are (1) communication methods and (2) content delivery.

Clear, Convenient Communication

Establishing consistent, sustainable communication protocols with learners is the best way to support persistence. Reflect on how you will communicate with your learners online. There are several options, and your choice should take into account what resources you have through your program, what devices and applications learners use, and how to build digital resilience.

1. **Using a mobile messaging tool like WhatsApp, Remind, or TalkingPoints makes outreach convenient and helps teachers send frequent nudging.** Some tools automatically translate texts between sender and recipient. Others can be used as learning tools, in addition to messaging, as illustrated in these examples of how in-person instruction can be facilitated on WhatsApp.

   Learners and teachers feel comfortable using texting to support teaching and learning. Pew Research Center data suggests that 97% of smartphone users text (Smith, 2015). Sharma et al. (2019) found that when teachers or service providers used texting apps to nudge learners to complete assignments or attend appointments, the students responded with higher levels of engagement. This way, texting can help learners stay on track.

2. **Using email to communicate with learners can help them boost their digital skills and resilience.** Creating an email account, learning netiquette, and attaching files are foundational skills that learners might need as caregivers, workers, and digital citizens. The routine use of email for a productive purpose, like reaching educational goals, may help learners develop confidence and agility with online communication, a concept known as "digital resilience."

Consistent Content Delivery

Whether you are teaching in a blended, hybrid, HyFlex, or distance model, a "homeroom" or a "portal" can help you and your learners stay organized. Consider your current distance or digital instruction: Is there one place learners can access to do multiple things? Is there a single entry point you could create so learners stay on track? A digital homeroom, learning management system, or eLearning platform can give learners access to all learning resources and support documents.

1. Build a website or "hyperdoc" as a digital homeroom.

Weebly and Google Sites are free popular website-building tools that teachers might use to create a digital homeroom. It's also possible to accomplish this using a simple Google slide. A Minnesota instructor used Google Docs to create a "hyperdoc," or a hyperlinked document, which she downloaded as a PDF and shared with learners as a virtual classroom space. Each object in the hyperdoc is a link to an online resource. Download and try it by clicking on the images in the PDF.

2. Use a learning management system (LMS).

An LMS is a more complex version of a teacher or program-created digital homeroom. LMS platforms vary in their features, but the most robust enables teachers to create and organize lessons, create assignments, send messages and announcements, and monitor learner progress. Learners have the benefit of having a single portal through which they can access nearly everything related to their enrollment and progress. They also get to flex their digital resilience, building confidence to move forward in their next phases of learning and navigating an LMS.

LMS adoption happens at different tiers. Some states implement their use statewide, with K-12 and postsecondary systems using the same system. Sometimes, they're used at an organizational or regional level. In some cases, individual teachers take advantage of the

simple, free versions of Google Classroom, Canvas, or Edmodo to serve their instructional needs. Other LMSs include Blackboard, Desire2Learn (D2L), Moodle, and Schoology.

The broad range of features in an LMS can't be overstated. These systems are built to do almost everything associated with teaching and learning. Some IDEAL member states even use an LMS to deliver professional development, giving teachers the benefit of experiencing their LMS from a learner perspective. If you're just getting started, you may want to seek out opportunities for training and collaboration.

Why We Chose Our LMS

"One of our main goals for using an LMS was 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 chose one to use program-wide. Our decision was based on one teacher having deep knowledge of that particular tool and content already available. It is also free and we feel it is a very friendly tool for low-level ESL Learners."

– An administrator in Rhode Island

3. Leverage courseware/online curriculum.

Digital homerooms and LMSs enable programs and teachers to develop and deliver a core online curriculum for students. Another way to approach this is to purchase licenses for online ready-made curricula like Burlington English, EnGen, Essential Education, Learning Upgrade, or USA Learns. These offer comprehensive curricula that follow a consistent, repeated lesson format in online courses at various levels. They can relieve some of the burden of curriculum development and often have features that mimic an LMS, like teacher dashboards that show data regarding learner progress. Thoroughly familiarize yourself with the content within, including how it looks and works for students (some platforms enable this with a "preview" or "student view" setting; in others, you may need to create a student account for yourself).

In a blended, hybrid, or HyFlex learning scenario, think about how your strategies for streamlined communication and content delivery can complement in-class instruction. For distance education, think about how these are the main portals through which learners access instruction. Being an involved instructor means considering how learners will access your support, interaction with their peers, and the most essential resources for learning. Your streamlined communication and content delivery strategy acts as a front door that, when it opens, leads learners to the meaningful interactions and learning experiences you've designed for them.

Of course, learners aren't the only beneficiaries of this intentional design. Teachers interviewed in the study described in *New Models for Distance Classes in Adult Education* (Johnston et al., 2015) suggested that they were more likely to provide differentiated instruction to meet the individual learning needs of their students when they had a website. Once a teacher has found and evaluated a resource, they can post it in a central location rather than keep track of bookmarked web pages and emails to students. This strategy puts the teacher squarely in the role of active facilitator, a critical characteristic of involved instruction. Streamlining technology use means teachers can also develop confidence and fluency with the tools, developing their digital resilience.

The Workforce EdTech tool evaluation criteria may help you choose between many of the applications and platforms named in this section.

Supplemental Resources

There are times when even the most robust, thoroughly developed curriculum cannot cover all the learning needs of a learner or classroom of learners. Though most creators of online

learning produce quality resources, what your organization or state purchases may not meet the academic, language, or computer skill needs of all learners or be culturally relevant (Hannon & D'Netto, 2007; Smith & Ayers, 2006). Also, an online curriculum may not fully address the key shifts and standards outlined in the College and Career Readiness Standards for Adult Education (CCRSAE).

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. Or, they may wish to integrate other subject areas, such as health literacy, financial literacy, or workforce preparation, into academic skill instruction.

One way to address these gaps is to integrate supplemental resources. Content developed or self-selected by practitioners allows for more customization and alignment to standards, and is generally more learner-centered. There are plentiful free resources available on the web, which are particularly useful in blended learning scenarios.

Free vs. Open

Some excellent resources are free, and others are open. It helps to know the distinction. Free refers to the cost (or lack thereof), while open gives the user certain rights to adapt and remix the resources. *The Change Agent* magazine offers us a great example of the distinction. The Change Agent is an online magazine that publishes the writings of adult learners on important topics such as racial equity, re-training for work, working and caring for children, voting, and mental health. There are different levels of access to The Change Agent resources.

- **All Change Agent materials**: For full access to The Change Agent, teachers can pay $30 for a one-year subscription (their students log in for free using the teacher's credentials). This helps The Change Agent cover basic costs like providing stipends to authors.
- **Bulk subscriptions**: Many IDEAL states have statewide bulk subscriptions. Teachers and students in these states have an easy-to-remember username and password that all state-funded programs can use.
- **FREE Change Agent articles**: Many Change Agent articles are available for free if the costs for publication have otherwise been covered. Those can be found in the SkillBlox library (which can be accessed when instructors are logged in) or on The Change Agent's SkillBlox profile page.
- **OPEN Change Agent materials**: Some of the Change Agent articles have been transformed into reusable classroom materials with "open" licenses, like these Google Slides, that teachers can duplicate and adapt, or these Lesson Packets.

Open Educational Resources (OERs)

An image, eBook, podcast, video, fully developed online course, or interactive learning activity can all be OERs. What makes an educational resource "open"? Unofficially, OERs give users the right to do the "5 Rs":

- Retain: Make, own, and control a copy of the resource (e.g., download and keep your own copy)
- Revise: Edit, adapt, and modify your copy of the resource (e.g., translate into another language)
- Remix: Combine your original or revised copy of the resource with other existing material to create something new (e.g., make a mashup)
- Reuse: Use your original, revised, or remixed copy of the resource publicly (e.g., on a website, in a presentation, in a class)
- Redistribute: share copies of your original, revised, or remixed copy of the resource with others (e.g., post a copy online or give one to a friend)[2]

The value of OER comes from the fact that teachers can use them either as is or adapt them to better suit their learners and the instructional context. Because they are free and often

adaptable, they are ideal supplemental resources for either blended or full distance instruction.

Typically, OER are licensed via Creative Commons (CC) licensing. The various CC license types provide clear guidance to users as to what they can and cannot do with the resource.

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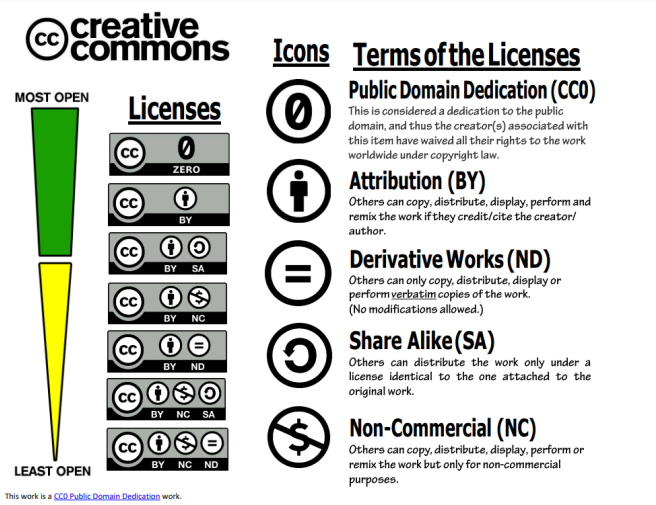
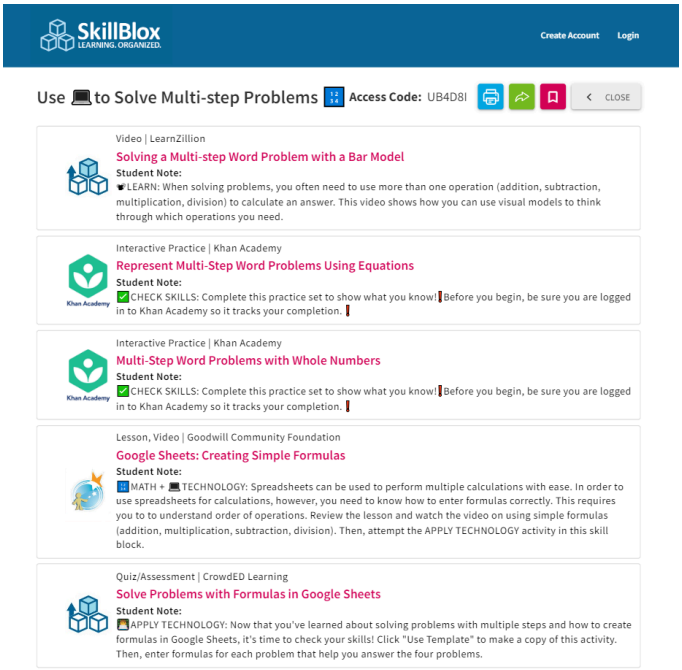
[2] This material is an adaptation of Defining the "Open" in Open Content and Open Educational Resources, which was originally written by David Wiley and published freely under a Creative Commons Attribution 4.0 license at http://opencontent.org/definition/.



Each Creative Commons symbol provides guidance on what you are allowed to do. Click here for a simple overview of Creative Commons licensing, including a transcript of this graphic.

You can find OER by doing an internet search. If you use Google, select the advanced search option setting "usage rights" to show only resources that can be freely used or shared. More instructions for finding OER are included on an OER support website funded by the U.S. Department of Labor for programs with learners in community and technical college programs.

SkillBlox is a platform designed to simplify the process by which adult education teachers find quality free and open resources. It includes thousands of activities for adult learners that are searchable by skills frameworks, such as the College and Career Readiness Standards for Adult Education and open keyword search. Instructors can find a wide variety of resources for their learners, such as Khan Academy math lessons, PhET Simulations, or leveled readings from Reading Skills for Today's Adults. Using SkillBlox, teachers find and choose the activities they wish to use, then organize them into a collection to share with learners. Explore SkillBlox to see what others have created, and then sign up for your own free account!



Note: This Blox was created by selecting activities that align to the CCRS standard 4.OA.3 - Solve Multi-step Problems Using the Four Operations and adding additional activities to integrate digital skills into learner practice.

Consider the following guidance when selecting supplemental resources.

1. **Select standards-aligned content or content vetted by teachers.** Make sure that the resource 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. For example, SkillBlox allows instructors to search for math skills they wish to teach based on the CCRS. Instructors can then find resources that align with that standard from a variety of OER sources and then share them with learners.

2. **Choose a variety of resources. Not all OERs will work for your class.** Not only must you think about OER as resources or materials that will support the learning objectives of a curriculum or even a lesson plan, but 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.

3. **Ensure content is appropriate for your learners and the 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.org has made a rubric that teachers might use to evaluate the utility and suitability of an OER available online. You can adapt the rubric to best suit your instructional context. Check out this example of an adapted rubric from the EdTech Center @ World Education. Because OERs are plentiful, you will likely find resources that align with a wide variety of learners, learning styles, and technical requirements or limitations.

4. **Collaborate on the crowdsourced curation or creation of OER.** Despite the availability of a wide variety of quality OER, they are often overlooked by educators because it can be time-consuming to sift through various websites to find the "right" activity. Many organizations and states have attempted to address this barrier by coordinating the curation of OER to address specific content needs, such as filling standards coverage gaps of existing curricula or looking to provide more engaging options, such as videos for their learners. This concept of structured, crowdsourced collaboration is the basis of the CrowdED Learning EdTech Maker Space. EdTech Maker Space (ETMS) projects engage instructors in resource co-creation focused around a particular curriculum, content area, or edtech tool. As instructors learn about and share strategies for using the resources of focus for the project, they collaborate on the curation, adaptation, or creation of OER. One ETMS curation project focused on the curation and alignment of digital skills activities, which resulted in this Digital Skills Library. Another ETMS project engaged teachers in learning how to use edtech tools, then adapting activities from the ESL Story Bank (Literacy Minnesota) using those tools to create collections

of interactive exercises to support language development concepts from each of the stories.

Trends and New Uses of Technology

Live Remote Instruction

During the COVID-19 pandemic, many programs provided instruction to learners through remote live instruction using video conferencing and saw the potential for supporting persistence by offering flexibility in attendance. Once they established the resources, training, and practices needed to succeed with this approach, some decided to keep using it (Belzer et al., 2022). Teachers found that many of the good teaching strategies employed with in-person learners could also be used at a distance. Adelson-Goldstein (2021) developed a resource, *Ways to Transfer In-Person Activities and High Leverage Practices to Remote Instruction*, which provides examples of in-person teaching strategies, ideas for digital substitution, and how learners experience this on a phone. The EdTech Center @ World Education developed a tool that can be used by teachers and their supervisors to provide a supportive review of remote live instruction. It provides structure for observation and reflective conversations to strengthen teachers' capacity for remote instruction. The tool is available in an editable Word version or as a fillable PDF. You can learn more in our blog, *Remote Instruction Observation Tool*, or watching the October 2021 webinar recording.

Artificial intelligence and adaptive learning

Artificial Intelligence (AI) is a somewhat new but very important topic in adult education, offering new possibilities and risks that could impact the efficacy and equity of digital education. AI-powered educational tools can analyze vast amounts of data on learner performance, preferences, and behaviors to tailor instruction in real time. This technology enables a level of individualization that was previously impossible at scale, potentially addressing the diverse needs of adult learners more effectively than ever before.

A significant recent development in AI is GenAI, which refers to AI systems capable of creating new content, including text, images, and even code. These systems, like ChatGPT and "Magic features" in Canva, are redefining content creation in education. World Education's Open Prompt Book from CampGPT provides guidance for teachers on leveraging GenAI to develop customized learning materials for adults.

Adaptive learning systems, a key application of AI in education, are particularly valuable in distance education and blended or hybrid learning environments (EDUCAUSE, 2017). These systems dynamically adjust the difficulty, pace, and content of instruction based on a learner's responses and progress, providing personalized learning experiences even when students are working remotely. In a distance education context, if a learner consistently struggles with a particular concept, the adaptive system might automatically provide additional explanations, simpler examples, or prerequisite lessons without requiring direct teacher intervention. Conversely, for learners demonstrating quick mastery, the system can accelerate their progress or offer more challenging content, ensuring engagement even without face-to-face interaction.

In blended and hybrid learning models, adaptive learning systems can complement in-person instruction by addressing individual learner needs during independent study time. For instance, data from the adaptive system can inform teachers about areas where students need additional support during synchronous sessions, whether online or in person (EDUCAUSE, 2017). This approach not only optimizes learning efficiency in various instructional modalities but also helps maintain learner engagement and motivation, which is particularly crucial in distance and blended learning environments where self-direction plays a significant role (EDUCAUSE, 2017; Rappel, 2017).

As AI becomes increasingly prevalent in education and the workforce, developing AI literacy among adult learners is crucial. World Education's *AI Literacy Matters* brief emphasizes the

importance of equipping adults with the knowledge and skills to understand, critically evaluate, and effectively interact with AI systems. This literacy is becoming as essential as digital literacy in navigating modern society and employment landscapes.

While the potential benefits of AI and adaptive learning are significant, it's important to consider the challenges and limitations. Issues of data privacy, the digital divide, and the need for human oversight remain critical concerns. The Workforce EdTech AI Integration Framework provides a structured approach for educators to incorporate AI into their practices, ensuring thoughtful and responsible implementation. It includes within its six dimensions questions to ask (directed at vendors and developers) and questions to consider (directed at practitioners) so that all stakeholders have accountability for the thoughtful integration of AI tools and systems. The effectiveness of these technologies depends on the quality of their underlying algorithms and data sets, which may inadvertently perpetuate biases if not carefully designed and monitored. As such, the integration of AI and adaptive learning in adult education should be approached thoughtfully, with ongoing evaluation and a commitment to equitable access and outcomes.

Virtual and augmented reality

Virtual Reality (VR) and Augmented Reality (AR) are emerging as powerful tools in adult education, especially in distance and blended learning contexts. VR provides immersive, three-dimensional environments that can simulate real-world scenarios, making it particularly valuable for vocational training, safety instruction, and experiential learning (Vobornik, 2022). For instance, VR can allow nursing students to practice procedures in a risk-free virtual hospital or enable construction trainees to experience working at heights without physical danger. AR, on the other hand, overlays digital information in the real world, enhancing learners' immediate environment with relevant data or instructions (Misha, 2023). This technology can be especially useful in technical education, allowing learners to see step-by-step guidance superimposed on the actual equipment they're working with. In distance education, VR and AR can bridge the gap between remote learners and hands-on experiences, providing practical, interactive learning opportunities that were previously only possible in person. As these technologies become more accessible and affordable, they have the potential to enhance skill-based learning and practical training in adult education.

Microlearning and Micro-credentials

An emerging trend in adult education is the adoption of microlearning approaches and micro-credentials. Micro-learning involves delivering content in small, focused units, typically consumable within 3-10 minutes, while micro-credentials are certifications of specific skills or knowledge, often represented by digital badges. The rise of "micro" approaches is driven by several factors:

1. Mobile learning: With 90% of Americans owning smartphones (Gelles-Watnick, 2024), bite-sized content is ideal for on-the-go learning.

2. Just-in-time learning: Micro-learning aligns with the need for immediate, applicable knowledge in fast-paced work environments.

3. Skills-based hiring: Employers are increasingly focusing on specific skills rather than broad qualifications (Gallagher, 2018).

Micro-credentials, often in the form of digital badges, are a way to document and display these bite-sized learning achievements. When learners complete a micro-learning unit or demonstrate a specific skill, they receive a digital badge. These badges can be included in online portfolios and shared with employers or educational institutions, providing a detailed, verifiable record of the learner's skills and accomplishments. Not only do badges demonstrate learner accomplishments, but a clearly sequenced badging system can also establish tangible goals for learners (Finkelstein, 2009; Stefaniak & Carey, 2019; Wilson et al., 2016).

Platforms like Credly, Badgr, and Bloomboard allow educators to design and issue digital badges. Many Learning Management Systems (LMSs), including Canvas and Moodle, have integrated badging systems.

The appeal of micro-credentials lies in their flexibility and granularity. They enable learners to build a personalized skill set over time, catering to the increasing demand for lifelong learning and adaptability in the modern workforce. For educators, a well-designed micro-credentialing system can establish clear, achievable goals for learners, enhancing motivation and engagement in the learning process.

As the education and employment landscapes continue to evolve, micro-learning and micro-credentials are likely to play an increasingly important role in adult education, bridging the gap between learning and practical skill application.

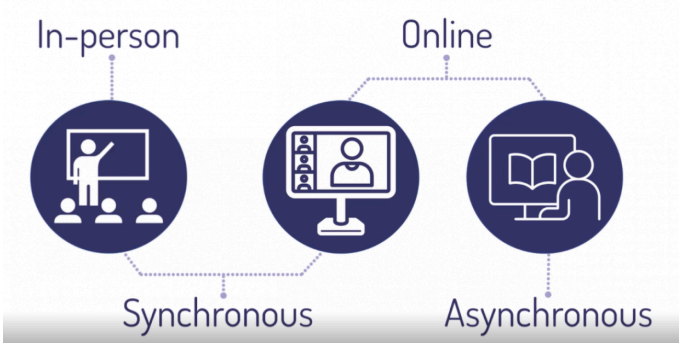
Acknowledging Accomplishments Using Digital Badges

"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 reading so many hours of study."

— A teacher in Pennsylvania

HyFlex Instruction

Hybrid-Flexible (HyFlex) has been in practice in higher education for several years (Beatty, 2019) and is an emerging instructional modality in adult education in part because of the success of live remote instruction during the pandemic. In this modality, learners can choose to participate in instruction in three ways: regular in class instruction, synchronous remote live instruction, or asynchronous online activities.



The different modes of HyFlex instruction (Rosen et al., 2022)

This requires the teacher to simultaneously teach in-class and live online learners. The EdTech Center has developed *The Guide for Design and Implementation of Hybrid–Flexible (HyFlex) Models in Adult Education* (Rosen et al., 2022) based on interviews with 25 teachers and target observations of the HyFlex model. The Guide includes a video series featuring adult educators across the country showing key strategies and technologies they employ in their HyFlex instruction.

Concluding Thoughts

This is the longest and, likely, the 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 you have more to learn, you are in good company. There are entire books and courses on the topics covered here. In fact, in our IDEAL 102 study groups, we focus on instructional issues and the HyFlex model in more depth. To get the most from what you have read here, 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 approaches that seem most doable in your teaching context and then experiment with them. Learn by doing. Use the activities below to 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 distance, blended, hybrid, or HyFlex modalities. Consider including the following information: activities supporting communicating with learners, selecting learning content, building digital literacy of your learners. What edtech routines could you create or do you already use to support learning? What resources and edtech tools, such as GenAI, might you use in lesson planning and learning activities with students?

Activity 5.2 Monitoring Learning in Online Curricula

Decide how you will monitor learner progress in your chosen curricula.

Find resources at your organization, through an 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.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Chapter 6

Assessment

Student Participation and Progress

Introduction

Assessment is an important part of instruction regardless of how it is delivered. Adult educators use assessment for several reasons: to determine an appropriate placement for a student before instruction begins, to inform instructional approaches and content, 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, BEST Plus) or assessments developed by a program. Gauging learner progress can be accomplished by using a combination of formative and summative assessment strategies.

Why Assess?

When assessment is done well, it provides valuable information about a learner and the instruction provided (Edutopia, 2008).

Provides diagnostic feedback

- What is the student's knowledge base?
- What is the student's performance base?

- What are the student's needs?
- What has to be taught?

Helps educators set standards

- What performance demonstrates understanding?
- What performance demonstrates knowledge?
- What performance demonstrates mastery?

Evaluates progress

- How is the student doing?
- What teaching methods or approaches are most effective?
- What changes or modifications to a lesson are needed to help the student?

Relates to a student's progress

- What has the student learned?
- Can the student talk about the new knowledge?
- Can the student demonstrate and use the new skills in other projects?

Supports student self-evaluation

- How am I doing?
- Now that I know how I am doing, how can I do better?
- What else would I like to learn?

Supports teacher self-evaluation

- What is working for the students?
- What can I do to help the students more?
- In what direction should we go next?

Formative 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 et al., 2015; Popham, 2011). Formative assessment can be structured using rubrics, quizzes, or observation protocols. It might also be less formal, quick comprehension check questions asked throughout an instructional period or exit tickets turned in at the end of class (Sparks, 2015). Assessments are valuable for students because they provide a way for them to gauge their progress toward meeting goals.

Tips for Doing Formative Assessment in Distance and Digital Education

Collect data over time. Formative assessment is a process, so you should collect evidence of learning throughout the semester.

Require students to submit evidence of learning.

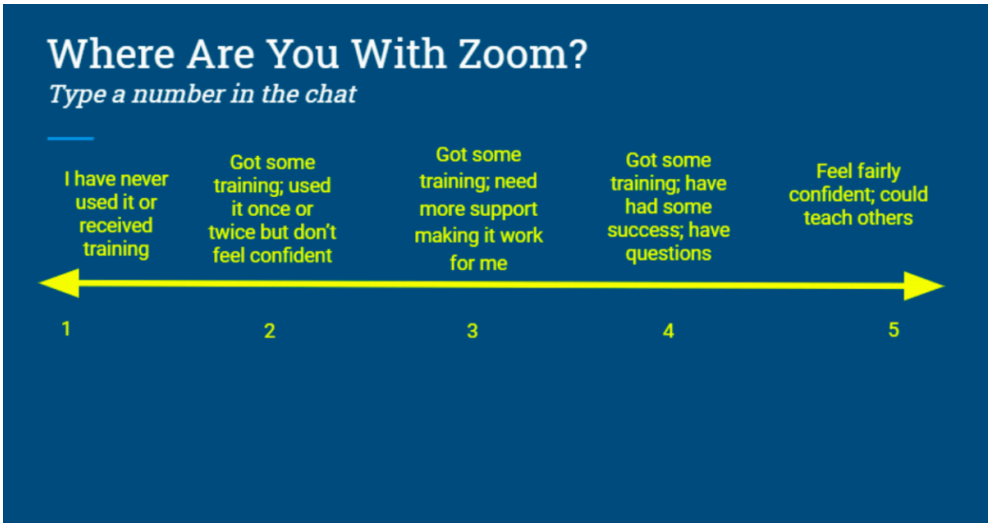
For example, you might have students submit reflection videos using Flip, formerly called FlipGrid, or send photos or screenshots of their progress. Learners can use Padlet or Google Sites to develop a portfolio of their learning progress. Ask students to complete regular self-assessments by having them indicate progress by completing a weekly survey that lists expected progress markers; give them opportunities for reflection on that progress (Miller, 2020a).

Provide feedback.

Provide written feedback on shared documents or discussion boards. If you have some face-to-face time, provide oral feedback during that time. You might use breakout rooms for students to give feedback to each other. In a distance format, you can use a discussion post or collaborative work in a Google Doc for students to provide feedback during established time frames (Miller, 2020a).

Include comprehension checks in remote live class meetings.

Embed quick comprehension checks in your instruction (Miller, 2020a). Use Yes/No buttons in your webinar tool, short question response prompts in chat, or "handswers" (an engagement strategy where students are prompted to hold up a number of fingers to select a response). Get creative and embed questions directly in your presentation slides. For example, using a slide like this, you can have students add responses to quick feedback questions.



You can also create class slides using Pear Deck integration in Google Slides. This extension for Google Slides makes it possible to embed questions for your students to answer as you give a lesson.

Connect personally.

When teaching and learning happens largely at a distance, both teachers and students can feel isolated. A recent study of adult education instructors showed that most instructors relied on reaching out to learners personally between video classes—often via a phone call (Belzer et al., 2020). You can make the most of these conversations by following these tips:

1. Prepare for the call; know what you want to ask about. Plan questions that will inform you about where students are in their assigned work and what problems they might be having. Decide ahead of time how formal you want the call to feel. If you have particular learning objectives that you need to assess, plan out the questions ahead of time.

2. Keep track of what you learn in these calls. Use a tracking sheet such as this example that helps you maintain records of learner progress around their goals.
3. Include questions about how students are experiencing the distance education format and activities. Ask about what's working or what activities are particularly challenging. Ask for suggestions on what changes the student sees as useful.

Use what you learn.

Adjust your instruction based on what you are hearing from your students. Gathering data, organizing it, and reviewing it will show patterns about where your technology and activity choices are not working or where you might need to add supplemental resources for more content.

Summative Assessment to Measure Learning Over Time

Interim and summative assessments both measure learning over time. Interim assessments show individual student progress toward a set of standards. These might be considered summative tests of a chunk of content. They happen periodically, like in the middle of a curriculum unit. They are also somewhat formative because teachers can adjust instruction for the rest of the unit or block of time (Sparks, 2015).

Summative assessments compare a student or group of students against a set of standards. Though they do show individual student progress, they also measure the efficacy of instruction. This assessment occurs at the end of a unit or course or program year. Summative assessments are standardized in order to support comparisons among students or groups of students (Sparks, 2015).

Tips for Doing Summative Assessment in Distance and Digital Education

Do not assess everything. Your list of standards is likely longer than what is possible for you to assess in the time you have with students. Follow this R.E.A.L. guide to determine what to prioritize (Many & Horrell, 2014):

- **Readiness**: Teachers can design assessments to determine if learners have the skills needed for the next class, level, or step after completing the adult education program.
- **Endurance**: Teachers can design assessments to determine if learners can demonstrate the skill in other contexts such as how they might use the skill in real-life situations like the workplace, daily life interactions, or postsecondary education.
- **Assessed**: Teachers can design assessments to determine if learners have the skills they need to pass formal assessments like high school equivalency tests or entrance exams.
- **Leverage**: Teachers can design assessments to determine if learners can demonstrate the skills taught in different subject areas (e.g., analyzing graphs in math as well as social studies).

Make use of performance assessment.

Performance assessments require application of knowledge and skills, rather than just rote recall or demonstration of them. They often result in an end-product like a presentation that is informed by more than one subject and crafted by drawing on a range of technology skills. There is generally no single correct answer, but evaluation is done by using a rubric (Miller, 2020b).

Take into account differing access to technology.

Don't assume that students will have the same access to technology. Because access might be limited to specific times, have students take the assessments during a remote synchronous class session. You can also provide oral assessments by phone, and you can have students complete handwritten activities that they photograph and text to you (Miller, 2020b).

Examples of Assessments Possible in Distance Education

Classroom teachers have a variety of formative and summative methods they can use to assess students' performance: homework and class assignments, student feedback and what they say about what and how they are learning, the questions students raise in class, students' body language, and unit quizzes and tests. Teachers working with learners primarily at a distance can also assess students' progress, but they 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 in-person 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 blended learning environment.

Reviewing Student Online Work

One way for teachers to assess student progress is to regularly review the student's work and provide feedback. 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. When providing synchronous remote instruction, teachers can assess students' work similar to in-person methods, such as asking questions, using real-time formative assessment tools and games, or having students submit writing samples through chat. Since the primary focus of these formative assessments 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.

Most comprehensive online curricula offer some form of tailored assessment (e.g., diagnostic instruments, unit quizzes, tests) designed to help teachers and students gauge student progress. Teachers can use these tools 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 and determining readiness.

Some examples of how teachers review student online work include:

- Comparing the pre- and post-test scores generated by the curriculum products
- Requiring students to visit the program in person either to have work reviewed or to take a quiz
- Having students use their phone's camera to take a picture of completed work and send it to the teacher via text, email, or some other method
- Assigning online tests (either those associated with the curriculum or those created by the teacher using something like Google Forms or a learning management system, or by a third-party site)
- Using real-time online assessment tools and games (e.g., Kahoot, Quizizz, Baamboozle) in blended learning or remote synchronous classes
- Asking students to demonstrate skills by writing on the whiteboard, chatting answers, or responding to questions either within the webinar software or through add-ins such as Poll Everywhere or Mentimeter
- Creating exit tickets where students answer a few questions to demonstrate mastery of the skill and share what questions they still have about a topic using online tools such as Google Forms, Socrative, or texting their response to the teacher.

Note, if you are creating your own assessments, do follow some key principles of Universal Design for Learning (UDL), a framework for developing flexible learning environments or activities that can meet the needs of a wide range of learners. The UDL framework provides principles, guidelines, and considerations to ensure educators offer multiple means of representation, representation, and action and expression. UDL should be considered and implemented into instruction as well as assessment development and implementation. The Center for Applied Special Technology (CAST) provides extensive guidance and resources around Universal Design for Learning, including the National Center on Accessible Educational Materials website.

Be sure items are clear and concise.

Keep things simple so you won't distract sudents from the key skills you are trying to assess. Avoid idiomatic language, like "brainstorm ideas" or "think outside the box." Avoid false cognates—words that sound or look the same but have different meanings in two languages (Dame & Lea, 2020). For example, the English verb, "to record," looks like the Spanish verb "recordar" but "recordar" means "to remember".

Pay attention to content and language.

Take into account the diversity of the students in your class; consider cultural, linguistic, geographical, gender, disability, or socioeconomic demographic information. Create items based on topics familiar to all students, making sure they are not likely to be viewed as insensitive, biased, or relying unnecessarily on culturally bounded background information (Dame & Lea, 2020).

Avoid sensitive topics.

Do not include content involving sensitive or controversial topics that might distract students, like natural disasters, death, crime, or violence. You never know what trauma someone has experienced. If it is essential to include a sensitive topic as the context for an assessment item, let students know ahead of time and give an option to opt out of the item (Dame & Lea, 2020).

Culminating Activity

Teachers may also have students work on a culminating activity to show mastery of skill. Some examples of culminating activities include:

- Participating in an online discussion; longer writing assignments; or projects submitted via email, a learning management system, Google Docs, or a class website.
- Presenting on a topic using presentation software such as Google Slides along with online collaboration tools such as webinars or videoconferencing.
- Creating a product such as a blog, picture dictionary, newsletter, or website.

In a blended learning scenario, a cohort of students can use online collaboration tools, which will allow you to assess their 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.

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 weekly posts, but my learners can look back, see their improvement, and use old work to help them with new activities."

– An adult ESL teacher in California

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 Rubrics for Alternative Assessments

Teachers who use performance-based assessments, like culminating activities or portfolios, provide both clear expectations from the start and incremental feedback along the way. The use of rubrics or assessment tools for sharing assignment expectations, along with offering timely feedback and grading of student work, is central to the effectiveness of student learning.

Analytic Rubric

This common rubric (for a student writing assignment) lists criteria for completion in the left column and evaluation levels across the top. The cells of the grid explain in detail what the teacher will be looking for when they evaluate the work (Roell, 2019).

For example:

	Organization
4 Exceptional	Organization is coherent, unified, and effective in support of the paper's purpose and consistently demonstrates effective and appropriate transitions between ideas and paragraphs.
3 Satisfactory	Organization is coherent ad unified in support of the paper's purpose and usually demonstrates effective and appropriate transitions between ideas and paragraphs.
2 Developing	Organization is coherent in support of the paper's purpose, but is ineffective at times and may demonstrate abrupt or weak transitions between ideas and paragraphs.
1 Unsatisfactory	Organization is confused and fragmented. It does not support the essay's purpose and demonstrates a lack of structure or coherence that negatively affects readability.

Holistic Rubric

This simple rubric is less structured (Gunner, 2022). A teacher provides a series of letter grades or a range of numbers (1–4 or 1–6, for example) and then assigns expectations for each of those scores. Teachers grade and rate the students according to the rubric. This is a faster way to evaluate work but leaves no room for comments or detailed feedback (Roell, 2019).

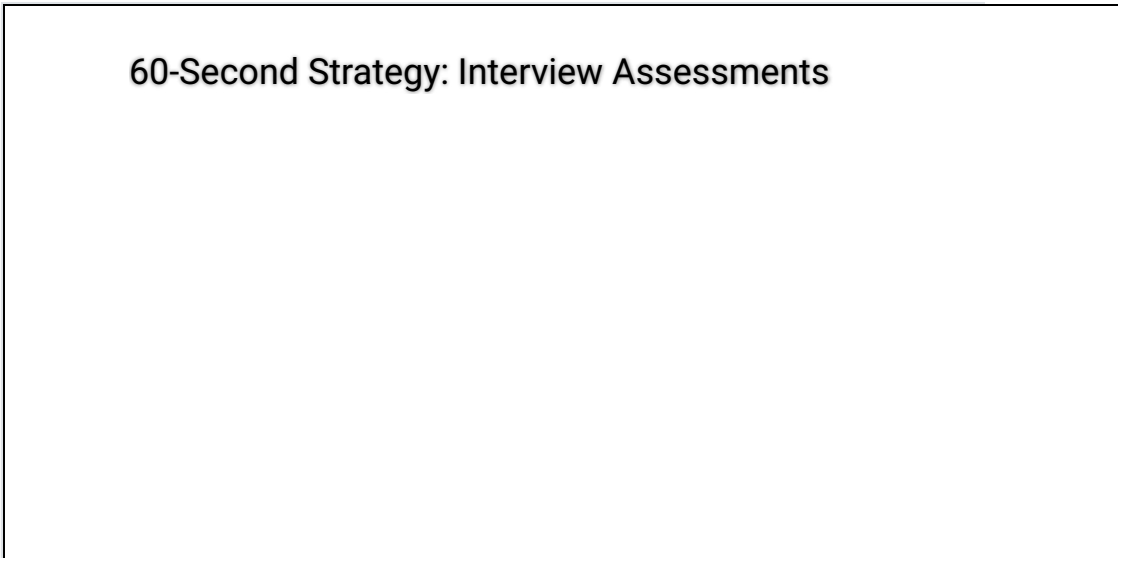
For example:

Description	Score
The presenter spoke clearly, held eye contact throughout the presentation, used more than two visual aids (including multimedia), stood up straight without hands in pockets, answered questions, and spoke for more than 5 minutes.	5
The presenter spoke clearly most of the time, looked down at notes but mostly held eye contact, used two visual aids (including multimedia), mostly stood up straight, answered one or two questions, and spoke for 4-5 minutes.	4
The presenter spoke clearly for part of the time, mostly looked at notes but made eye contact a few times, used two visual aids (no multimedia), stood up straight for part of the time, answered one question, and spoke for 2-4 minutes.	3
The presenter did not speak clearly, made eye contact a few times, used one visual aid (no multimedia), slouched or put hands in pockets a few times, did not answer questions, and spoke for 1-2 minutes	2
The presenter was difficult to understand, did not look up from notes, did not have visual aids, slouched or put hands in pockets for most of the presentation, did not answer questions, and spoke less than 1 minute.	1
The presenter did not prepare a presentation.	0
Teacher comments:	

You could use this template to create either an analytic or holistic rubric.

Interaction with Students

Using the telephone or an online tool (such as Zoom or Google Meet), teachers working with learners at a distance can meet with their students to review their work and ask them questions to assess their understanding of concepts. These meetings may also be held in person for students in blended or hybrid offerings. The following video shows how a K-12 teacher makes the most of a short conversation by turning it into an interview assessment:



Watch on YouTube

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 stand-alone tool used by teachers and students to document skills attainment.

Documenting students' progress can support persistence by changing students' beliefs about their capabilities and achievements (New England Literacy Resource Center, 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. Digital badges, referenced in the previous section, provide a great visual presentation of learner milestones and accomplishments.

Here are some tips for making your own checklist:

- List standards or other learning outcomes for the unit in language a student can understand.
- Enlist students to write indicators of progress (i.e., how they'll know when they achieve the desired outcome).Ensure that checklists are dated so you can chart progress.
- Leave room for comments to help fully illustrate learner progress.
- Always use the same template so that students can fluently use it.
- Make space for students to add their own criteria to a checklist or even their own checklists—to support learner-directed learning (Lauzon, 2014).

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 (e.g., HiSET™, GED®, TASC™)
- Passing individual sections of high school equivalency tests
- Certifications related to digital literacy and workplace skills (e.g., Northstar, WorkKeys®)
- National Reporting System (NRS) tests (e.g., TABE, CASAS, BEST Plus 2.0)

Assessment to Meet the NRS Guidelines

The U.S. Department of Education's Office of Career, Technical, and Adult Education (OCTAE) *National Reporting System (NRS) Technical Assistance Guide* (2024) states that distance learners can be included in NRS reporting as a subset of the learners the state reports, as long as states have an approved distance learning policy in their state's adult education plan. OCTAE first announced this option in 2007. 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. 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, OCTAE, and state policy documents for specific details. Note that *Distance and Digital Education Definitions and Reporting Practices: What We Have and What We Need* (Cherewka et al., 2024) reports on a survey of state directors and summarizes how different states report on the different modalities of distance and digital education.

The NRS Technical Assistance Guide (2024) states that distance learners may be assessed in person, at a secured proctored program site that meets the state's assessment policy or via virtual proctoring (i.e., remote test administration) when the NRS-approved test publisher allows it. The NRS Technical Assistance Guide states that distance learners "should be post tested after the same amount of instructional time as other students, according to the state's approved NRS assessment policy" (p. 19). Assessment must be done using a standardized test identified in the state's assessment policy. This does not mean, however, that the assessment must occur at the adult education center. Some adult education organizations 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.

Remote test administration that began during the COVID-19 period allows more opportunities for distance learners to be tested. Organizations remotely testing students when in-person contact was not allowed have found innovative solutions to this new testing method. Remote test administration continues to be a valuable option for assessing learners who may face barriers, such as transportation and childcare, that make in-person assessment difficult. See the table below for examples of challenges that some programs have found with remote test administration and the solutions they used to address them.

Remote test administration challenge	**Possible solutions**
Students do not have a device that can be used to take the test.	Partner with K-12 school districts to secure permission for adult learners to use their child's school-issued device for adult education activities, such as assessment and online assignments.
Students do not have access to Wi-Fi.	Create a map of local Wi-Fi spots available from places such as libraries and school districts. Provide learners with hotspots. .

More than one student at a time needs to be tested.	Some test publishers allow multiple students to be tested simultaneously. To make the process more efficient, have a staff member meet with students to test their technology and set everything up before the student is scheduled for a remote test.

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, but it can be longer). Contact hours can also be counted for distance learners, but these hours extend beyond times when a student is physically present.

The NRS Technical Assistance Guide (2024) states "contact hours for distance learners can be a combination of actual in person contact and contact through telephone, video, teleconference, or online communication, where the participant and program staff can interact and through which participant identity is verifiable" (p. 46). 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.

Proxy Contact Hours

States have the option to report proxy contact hours for the time learners engaged in 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 post-test students. They also provide instructors with another way of monitoring their students' 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 hour model (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 stand-alone software programs that track the time that a student is engaged with the curriculum and that

log out students after a predetermined period of inactivity. Typically, one hour of time in the program is accepted as 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 determines the number 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 post-test students. States that do not use proxy contact hours must provide information in their distance learning policy that explains how they will make decisions about appropriate post-testing intervals.

Post-testing Students

Getting students to come back to the adult education center for post-testing is one of the major challenges facing distance teachers. While remote test administration may resolve transportation issues, other barriers may still exist. Students might not have time to come in or adequate transportation. They might feel unwilling to meet face-to-face due to health issues. Even students who are post-testing remotely might feel reluctant. They may not see the importance of testing, or they may not have a device or adequate space in their home that allows remote testing. Yet post-testing is important both for monitoring student progress to guide instruction and for accountability purposes.

Post-testing Students

Our state requires students to return to an adult education class and take a post-test in at least one subject every three months. First, we remind students to go in and take a post-test. We point out how valuable this is to us and them. Then if they do not respond or go in and take a post-test, access to their online lessons is temporarily blocked. If they have a good reason for not post-testing right away, I will give them some extra time.

– A Teacher in Missouri

Teachers in IDEAL Consortium states report that they have used the following approaches to encourage post-testing:

- **Use incentives**: To bring students back for testing, teachers have used incentives ranging from gas cards to pizza parties to raffles. Others find that certificates or other tangible forms of recognition may motivate students to post-test.
- **Set expectations for post-testing at orientation and reminding students of this as they study**: Thus, students perceive post-testing as an integral part of their distance education program, and teachers build in a reminder to themselves to prepare students for the post-test.
- **Explain the point of post-testing (for both the student and the program)**: Tell students that post-testing will benefit them because it will allow them to quantifiably see progress and identify areas for improvement. Furthermore, post-testing will benefit the program because the program is required to report scores to the state in order to continue qualifying for funding. Their participation in post-testing will help keep the program going.
- **Put students at-ease**: Teachers can let learners know that post-testing is in most cases low stakes, which may address some learners' reluctance to test.
- **Offer post-testing in locations that are convenient for the students**: Some organizations have made arrangements with local libraries or schools located in the students' communities to conduct post-testing. A few teachers have reported that they will drive to the students' communities to administer post-tests.
- **Use remote assessments to post-test**: Programs administering remote assessments often work with digital navigators or teachers to ensure that learners have a device and internet that will allow remote assessment.
- **As a last resort, block students from the distance program until they post-test.**

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 in this chapter, which will you use and how will you implement them? If you are a practitioner new to distance or blended instruction but working where there is an established program, be sure to first consider what is currently in place.

Activity 6.2 Assessment for NRS Reporting

Articulate how you will fulfill NRS testing and reporting requirements for your distance and digital 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 learners and your plan for post-testing distance students. If you are a practitioner new to distance or digital education but working within 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 and Digital Education, these prompts are expanded into fully developed collaborative activities for your team to complete together.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Heading

Chapter 7

Administrative Issues

Getting Started

Introduction

In 2020, adult education administrators faced unprecedented challenges as they worked with their staff to rapidly upscale or develop from scratch distance education programs in response to the pandemic. Prior to COVID-19, most IDEAL Consortium states found that an extended period of six months to a year, of planning and piloting distance and digital education implementation allowed both teachers and learners to adapt and acclimate to the new learning format. However, adult programs were not afforded the luxury of that extended planning and piloting time once the pandemic began. Most programs were required to quickly find ways to provide remote instruction, as programs were ordered to immediately close in-person services. Most programs have retained some of the strategies that made it possible for them to stay connected to learners during that chaotic time, but they are now needing to reflect and build on that success as digital technologies continue to evolve.

Distance Education as a Pilot Activity

The EdTech Center @ World Education encourages states and programs to consider their first attempts at implementing distance and digital learning programs for adult education students as a pilot activity. Pilot activities are experimental in nature and allow an organization 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 organization; although if they succeed, they may become incorporated into the organization's regular course offerings. As noted earlier in this Handbook, teaching at a distance is dramatically different from teaching in a classroom. Organizations will need to experiment to learn what works best for their staff and students.

Here are some recommended piloting principles that program administrators might follow regardless of whether developing, upscaling, or refining distance and digital education programs:

Spend time planning all of the components of your distance or digital education program.

Even if you are already offering just a few remote classes, it is still critical to evaluate each major component of the distance and digital education program to determine what, if any, changes need to be made. IDEAL Consortium resources such as the Distance and Digital Education Site Plan that is a key activity of this course, and additional online resources can help organizations consider how they will recruit, assess readiness, and orient learners; prepare teachers; provide instruction; assess learners; and evaluate the success of the program.

Expect uncertainty and changes throughout the pilot.

When piloting new programming, there is bound to be uncertainty from both teachers and learners. Administrators can support teachers by acknowledging the uncertainty that exists when trying something new and understanding if first attempts do not match expectations. Teachers' apprehension or reluctance may be reduced if they know their administrator does not expect them to become instant experts in the technology, curriculum, and delivery method. In turn, teachers can be transparent with learners that they are both learning something new while piloting distance education, which may support students' willingness to participate and persevere.

Determine your measures of success, which includes student, teacher, and program outcomes.

Before a pilot begins, you should determine what success looks like. Consider defining success as learning more about the approaches that worked, as well as those that are problematic. While positive student outcomes, such as learning gains and goals met as measured by the National Reporting System (NRS), are important for adult education, there are other measures related to teaching and learning that can be considered during a pilot. These might include recruitment of new students from a different population, improvement in student digital literacy skills, increased student persistence, increased teacher confidence in using technology for instruction, new instructional materials, and the development of new

partnerships. Administrators will want to work with their staff to determine what measures beyond NRS outcomes they will use to measure success.

Create an environment that encourages experimentation.

Pilot programs are most effective if the participants—that is, the organizations, administrators, teachers, and learners 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 organization, in conjunction with people at the state and federal levels, must create an environment in which teachers working with learners at a distance or using new digital technologies in other modalities like blended, hybrid, or HyFlex education are comfortable with the risk-taking and creative thinking that accompanies all innovations.

Administrators may need to 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. For example, it took three to four 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.

Identify what works and what does not work.

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

Be aware of the approaches you choose and the rationale behind those decisions. Understanding the antecedents of success is critical to replicating that success (Reeves, 2006, Figure 1.1). As you work to implement your distance education program, be sure to build in ways for staff to reflect on what is working and what is not, as well as the related reasons why. Teacher reflection logs, supervisor check-ins, and professional learning communities are all ways that can help you identify what is working and what needs to be revised or abandoned. Some organizations have found that regular team meetings focused on successes and challenges were important to identify best practices and areas that needed either more attention or a different approach. Having such meetings will allow organizations to use a systematic approach to maintaining and expanding their programs in a more efficient and effective way.

Pilot activities should help organizations determine both whether a particular modality of digital education is a viable option for targeted learners and, if so, how organizations can best facilitate its implementation. Distance and digital education may work better for some

organizations 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 and digital education program can create buy-in from staff as well as alleviate concerns that may arise when trying something new. Many administrators have found it helpful to develop the vision for use of the modalities they want to make available for students and plan with a team of stakeholders to make it a reality. 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 and/or digital education program? Do you want to reach new learners, increase the intensity of instruction, improve students' technology skills, prevent students from dropping out from the program when they can no longer attend in person instruction, improve outcomes, or a combination of these areas?
- What modalities best support your vision (e.g., pure distance, blended, hybrid, HyFlex)?
- Since this is a new initiative, what are the goals for the pilot? What are the expectations at the end of the pilot?
- How can the new program build on your organization's strengths? How can it support achieving funders' expectations, such as meeting the Workforce Innovation and Opportunities Act (WIOA) performance standards?
- How can leadership for the distance and/or digital education program be shared?
- What is a reasonable timeline for implementing the new program?

Organizing the Distance Education Program

Each state and/or organization must choose the modalities (as described in Chapter 1, “Setting the Stage”), instructional materials, and technology to deliver the distance and/or education that will best meet the needs of its learners.

Distance and Digital Education Model(s)

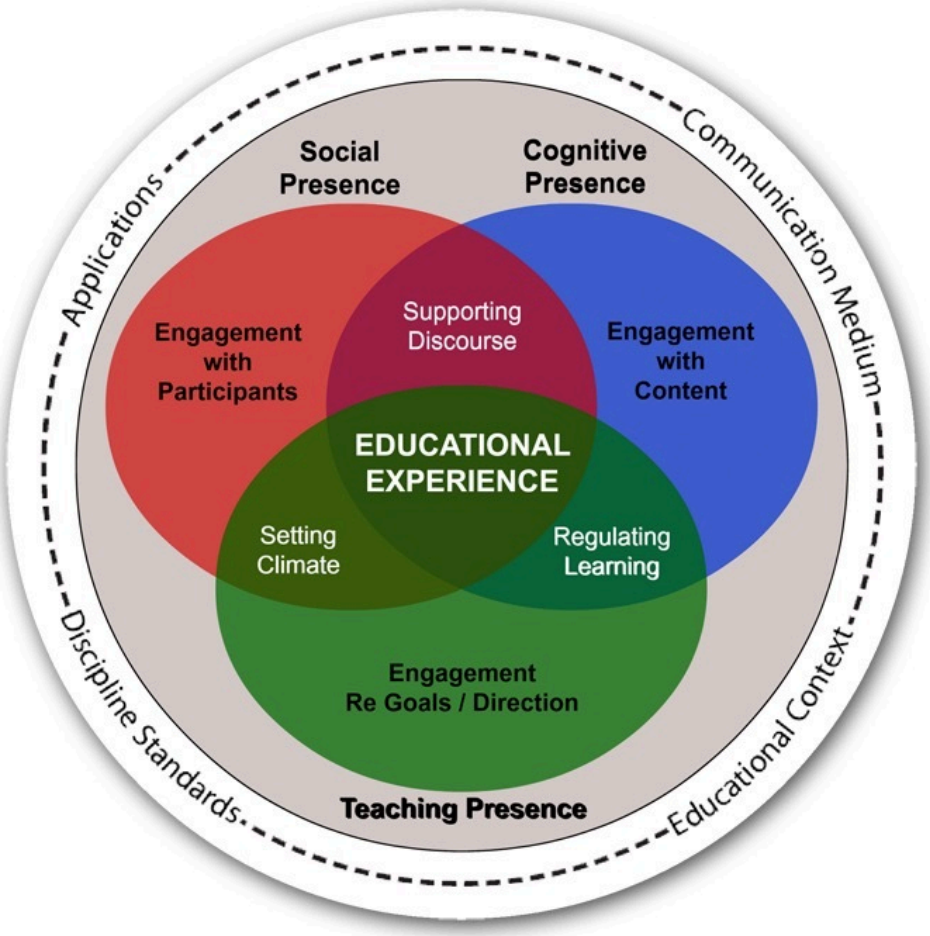
The amount of live remote or in person interaction that is required for distance and digital education programs may vary widely. Some organizations choose to offer a blended education program, where in-person instruction and online learning are fluidly combined to increase the intensity of instruction for students. Other programs 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. Some programs have open enrollment, where learners can start on any day, while other programs have found that some form of managed enrollment, where a group of students all begin learning together, creates efficiencies. HyFlex classes provide flexibility for the learner to choose between in-person instruction, joining the class remotely, or doing online asynchronous work. 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 organizations explore what distance education model best fits programs’ and learners’ needs.

Theoretical Framework

As you design your distance and/or digital education program, it is also important to look beyond the technical aspects of your model(s) and consider the learning environment in which all stakeholders—teachers and students alike—will participate. Frameworks are useful tools that can help guide thought and design in a meaningful and effective way. Introduced by Garrison, Anderson, and Archer (2000), *Community of Inquiry* (CoI) is one such theoretical framework developed for collaborative-constructivist transactions in education settings utilizing “computer-mediated communication” in the delivery of instruction.

The CoI framework is commonly used in the context of online higher education and distance learning and is therefore easily adapted for distance and digital education programs designed for adult learners. The authors suggest that “a worthwhile educational experience is embedded within a Community of Inquiry that is composed of teachers and students—the key participants in the educational process.” CoI emphasizes the importance of cognitive presence, social presence, and teaching presence in collaborative online learning environments and suggests that learning occurs within the CoI through the interaction of these three domains.

Figure 2.



Note: Graphic illustration of the Community of Inquiry framework, detailing the intersections of the three domains. Image used with permission from the Community of Inquiry website and licensed under the CC-BY-SA International 4.0 license. The original image is located at https://www.thecommunityofinquiry.org/framework.

Cognitive Presence

Cognitive presence involves the cyclical process of constructing meaning and developing critical thinking skills through inquiry-based activities (Shea et al., 2012). Similarly, Ghani and Taylor (2021) note that cognitive presence is students' capacity to construct and confirm meaning through sustained reflection and discourse. Cognitive processes and outcomes should be the focus of an educational CoI, and thus, social and even teaching presence are facilitators of the learning process (Vaughn, 2010).

Social Presence

Social presence refers to the ability of participants to establish and maintain a sense of community, communicate openly, and build relationships in an encouraging, collegial, online setting. In other words, social presence is the ability of learners to project their personal characteristics into the CoI, thereby presenting themselves as 'real people' (Rourke et al., 2001). Blended and other distance and digital learning modes often lack face-to-face

interaction and visual cues, so social presence is essential to establishing a collaborative CoI (Huang & Lee, 2022). Social Presence was leveraged as a theoretical framework in research done in adolescent refugee classrooms (Bigelow, et al.,2017; Vanek, et al, 2018). In these studies the researchers found positive associations between ESOL students' visibility in online learning spaces and the quality and frequency of their participation.

Teaching Presence

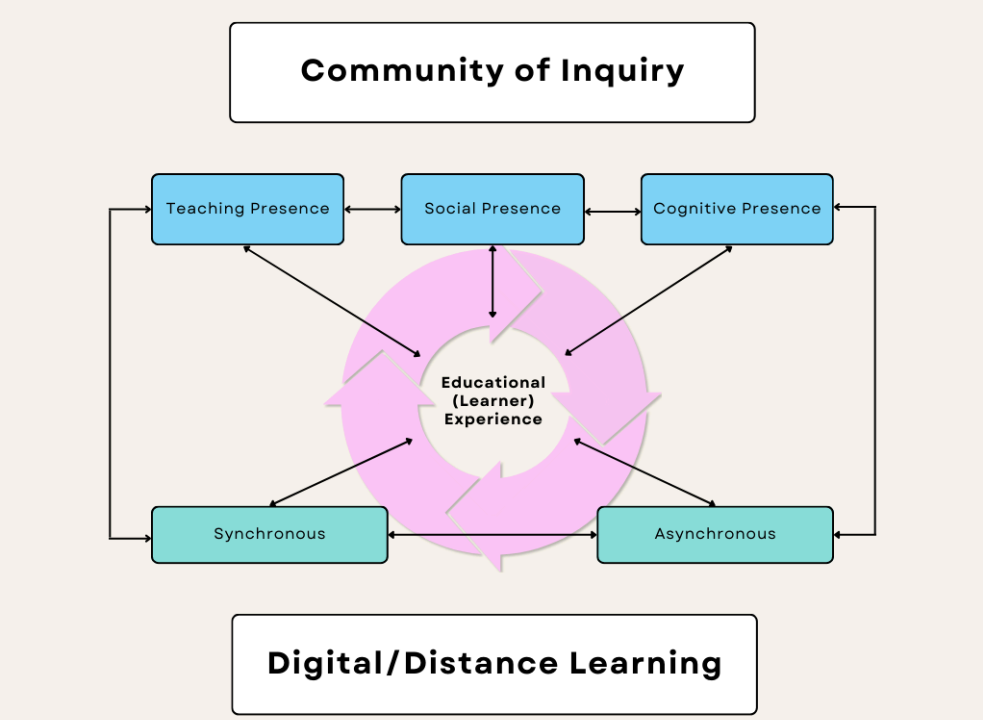
Teaching presence refers to the design, discourse facilitation, organization, and direct instructional experiences that support the other two domains (Garrison et al., 2000; Shea et al., 2012). Each of these is associated with the integration of social and cognitive processes in terms of the purposeful nature of the learning experience (Arbaugh et al., 2008). This is done in order to help learners achieve personally meaningful and educationally worthwhile learning outcomes (Anderson et al., 2001).

Phases of Teaching Presence

- Design and Organization
    - Curriculum
    - Techniques
    - Time parameters
    - Netiquette
- Facilitating Discourse
    - Leading toward consensus/understanding
    - Drawing in participants
- Direct Instruction
    - Specific content

Why CoI?

The CoI model is often used to design and evaluate online courses and has proven effective in promoting meaningful and engaging learning experiences (Shea et al., 2012). The framework provides a useful lens for examining the complex interplay between the different elements of online learning environments and can guide the development of effective strategies for facilitating interaction and collaboration among participants (Garrison & Vaughan, 2007).



Note: Graphic illustration of a conceptual framework for CoI and distance and digital learning integration.

CoI and Distance and Digital Education

The three elements of CoI—teaching presence, social presence, and cognitive presence—all contribute to a holistic educational experience. Similarly, the asynchronous and synchronous aspects of blended learning should coalesce in an integrated learning experience. Considering learning modalities for your agency through the lens of the CoI framework can be an impactful way to align your design with your objectives and create a comprehensive, integrated approach to distance and digital educational programming. This approach, which goes beyond simply designing a course, can inform your thinking and decision-making within other key areas such as selecting curricula, addressing digital literacy and access, budgeting, and planning professional development.

Instructional Materials

Another decision involves selecting instructional materials. Many organizations choose to use a publisher-developed curriculum as their core instructional resource when first beginning a distance program. Teachers can then identify or create supplemental activities to fill in gaps and further address skills. Often these are open education resources found online or perhaps in a library maintained by your organization. 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 if a program is planning on collecting proxy contact hours.

States may allow currently funded Adult Education and Family Literacy Act (AEFLA) grantees to administer distance learning programs even if the state does not have an established distance learning policy in place. However, OCTAE urges states to put a policy in place (or change current policy) as soon as feasible. Statewide distance learning policies help address how the state intends to collect instructional hours (if it chooses to do so), as well as convey its policies on student assessment. State policies may also convey important information about distance learning curricula that local programs can use to provide distance education.

Digital Literacy, Access, and Equity

A final 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, yet adults with less than a high school diploma or who make less than $30,000 are less likely to own a smartphone than the national average (Pew Research Center, 2024b).

Some students may go online only using a smartphone or tablet because they do not own a computer. U.S. adults with less than a high school diploma are most likely out of all educational attainment levels to indicate that they own a smartphone but don't have access to a high-speed internet connection at home (Pew Research Center, 2024a). The COVID-19 pandemic amplified the need to address the lack of devices and high-speed internet at home that many of our learners face. Adult education organizations found creative ways to address this digital divide by partnering with K-12 school districts, libraries, government entities, and grant-making organizations. There are also programs, such as EveryoneOn, which helps users identify free or low-cost access to computers, high-speed internet, and local digital literacy training for adult learners.

At the state level, Colorado launched their *Digital Navigator Program* in March 2023 to address the digital divide within their communities. The Learning Source, Colorado's oldest and largest adult education agency, was selected as one of the grantees and partners with AmeriCorps to serve nine counties across the state. In California, one adult education agency introduced an innovative Community Digital Navigator Career Technical Education pathway, not only creating a training opportunity for new jobs in an emerging field, but also a sustainable student-to-staff pipeline for their in-house Digital Navigator corps (see Yamashita, 2022, p. 92).

One of the goals of distance and digital education is to provide easier access, so the technology selected should not itself become a barrier. Some programs have also looked at non-tech ways to provide instruction to students, such as textbook drop-off locations throughout the community or mailing resources to students. There are also some instructional applications, such as Cell-Ed, that work on any mobile device and do not require a smartphone. These low- or no-tech methods make educational services more equitably accessible.

Once you select a model and decide on your instructional materials and technology, you will start focusing on planning in the five areas discussed throughout this Handbook: (1) recruitment, (2) assessing readiness, (3) orientation for learners, (4) instruction, and (5) assessment of distance and/or digital learners. In the final activity in the EdTech Center's online course, IDEAL 101: Foundations of Distance and Digital Education, each organization completes a Distance Education and Digital Education Site Plan for its distance or blended learning pilot. We strongly recommend 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 organizations will be doing and the types of supports they will need.
- Developing the plan as a team helps create a cohesive, experimental mindset.

Budgeting

Administrators adding distance and digital education programming need to consider costs related to the instructional approach, instructional materials, communication tools, and staffing. Being strategic in your selection is important. Administrators will also want to ensure that they allow enough staff time for planning, professional development, teaching, and reflecting on the pilot activities. Staff will need time to learn new technology, become familiar with the curriculum, and organize instructional materials for students. Distance teaching time may not equate to teaching time in the traditional classroom. Distance teaching can require more time for communication, instruction, and progress monitoring, all of which may need to occur individually with learners or outside of synchronous instruction.

Some questions to consider: What are the factors that determine the format of the delivery service? When might an organization use a safe socially distanced activity versus a group or individual online activity? How can technology be used to increase organizational efficiencies in communication, instruction, and program management? When might free open educational resources (OERs) be used, or when is a purchased product necessary? Are there ways to more efficiently replicate and scale your program, such as creating an online course template that all teachers use so they do not need to spend time working on formatting a course in a learning management system?

The Digital Equity Act provides opportunities for adult education programs to secure funding to support initiatives to improve students' access to technology and the internet, as well as build their digital skills. It provides $2.75 billion to create three grant programs that support improving digital equity and inclusion (NTIA, 2024). Programs can contact their state office as well as view the EdTech Center's Transforming Immigrant Digital Equity (TIDE) for more information about Digital Equity Act opportunities.

Identifying and Supporting Teachers

Identifying Teachers

Teaching at a distance or in other technology-rich modalities requires different skills from classroom teaching skills. (See Appendices C and D 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 and digital education teachers are innovative, creative, and flexible. They are open to new experiences, willing to explore multiple pathways to reach an endpoint, and able to try new strategies for meeting students' needs. 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.

Thus, just as distance learning is not for every student, distance teaching is not for every teacher. Whenever possible, you should ask teachers to volunteer to support or to try teaching at a distance or through modalities like blended or HyFlex; this increases the likelihood that the teachers will bring the constellation of characteristics described above. A teacher with no digital education experience and little interest in innovative educational practices is not likely to be successful. Because distance and classroom teaching are so different, teachers need additional training and openness to new educational approaches if they are to be successful.

Some organizations found ways to creatively leverage their staff's strengths during the pandemic. For example, teachers who did not feel comfortable teaching online focused on reaching out to students over the phone or texting to maintain open lines of communication. Team teaching allowed teachers with less digital literacy skill to learn from more experienced teachers. More experienced teachers designed online lessons that other teachers used for teaching. These strategies are still relevant today.

Several administrators have also pointed out the need to consider digital literacy skills when hiring teachers, since all teachers may need to deliver some type of online instruction. IDEAL Consortium states are collaboratively looking at frameworks that can be used to evaluate staff's digital literacy skills to identify opportunities for professional development and growth.

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 or in other modalities of digital education. Data from studies in several states indicate that, at the start of a distance education pilot program, only about half of teachers' time was spent actually teaching; the other half was devoted to the activities necessary to recruit learners, develop partnerships with other organizations, 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 education 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 will often need 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 on staff.

It is also important that teachers be knowledgeable about the technology needed to teach at a distance or in blended learning and HyFlex 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 to 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 organization 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 and digital education for adult learners, and teachers need a variety of support mechanisms as they make the transition from classroom teaching to distance and digital instruction. 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 organizations can make this transition easier for teachers. IDEAL Consortium states recommend that you do the following:

- **Provide 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 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 at teaching at a distance as they are in the classroom.

- **Provide mentoring groups in which experienced 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. Texas and California have extensive, formally organized mentoring programs for their distance educators. Teachers learn from the experiences of their colleagues and become part of an active community of practice. For example, the Outreach and Technical Assistance Network in California runs a Digital Leadership Academy that brings groups of teachers together and matches them with a coach.

- **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 cannot simply stay "one day ahead" of the 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 education teachers.

Monitoring Achievement and Evaluating the Pilot Process

In distance and digital education pilot programs, data play a critical role. While data regarding enrollment, hours of 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.

Accountability

In an ideal situation, states would release organizations from their customary accountability requirements for the first phase of any new pilot program. We believe that distance education for adult learners is so different from traditional classroom programs that it is equivalent to "reinventing the school." It requires that organizations 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 et al., 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.

Other factors may also affect accountability. For example, the U.S. Department of Education Office of Career, Technical, and Adult Education (OCTAE) determined it will not make any determinations of performance success or failure based on 2019 program year performance data because of the wide, sweeping impacts of COVID-19 on adult education services (Stump, 2020).

Data monitoring

Regardless of how the accountability of distance and digital education pilot programs is measured, data monitoring is a key component of the pilot. Organizations 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 pilots.

Administrators can work with the pilot team to determine how distance learners will be assessed. Administrators need to ensure that their organization'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 organization-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 organizations have had distance students participate in focus groups or complete surveys to provide additional feedback about the program. The Virginia Adult Learning Resource Center has created an Adult Education Indicators of Quality Online Courses rubric that could be used to identify strengths and areas of improvement.

A Note about Data Security and Confidentiality

It is important to maintain confidentiality and data security practices with distance education programs. Whether staff are working remotely from their home or in the office, it is important for administrations to ensure clear expectations and procedures are put in place to secure students' personal information. If staff are working from home, it is also important to protect their personal information. For example, staff could set up a Google Voice phone number for students to use so staff do not have to give out their personal cell phone numbers.

Moving Beyond the Pilot

Pilot programs have a limited life span and at some point are likely to be replaced by a larger scale version. Although the growth of the distance and digital education program clearly depends on state policies and support, the local organizations are where the changes are typically implemented. At the local level, the goal is to provide a modality of distance or digital learning as one of the available options for adult learners. A good place to begin is to create organization-wide awareness of the program and how it can serve students. Many organizations find that it is helpful to combine the recruitment, determining readiness, 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 organization. Some examples of how organizations have integrated distance learning into organization-wide activities and services are:

- Including distance and/or digital learning as an available option on all recruiting materials, such as websites, brochures, and fliers
- Training intake staff to identify students for whom distance learning might be a good fit
- Supporting the professional development of teachers interested in distance education

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 an organization is structured, 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 and digital education to an organization's spectrum of services should be viewed as an "organizational change" effort.

First and foremost, if you are considering adding distance education as a delivery mode, you must base your decision on the educational principles and issues that form the foundation of your organization. Thus, you will ensure that your decision is rooted in the mission of the organization and, therefore, will help make its addition to the organization smoother and more likely to succeed.

Experience in the IDEAL Consortium states suggests that adopting the following approaches may be useful to organizations moving from an experimental to a programmatic implementation of distance and/or digital education:

- Capture the lessons learned during the pilot phase and use them as a basis for future planning. Keep the practices that worked well and drop or modify 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 how the procedures have evolved and the rationale behind the decisions to make changes. This helps to formalize the process and ensures that all participants have a shared understanding of the organization'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, organization administrators, technical support people, recruiters, and others involved in making the organization's distance project a reality. Keep in mind that the nature of distance education may require some flexibility in job roles and assignments.
- Get involved with people at the state level interested in distance education and make policy recommendations based on participants' experiences.

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

The Workforce Innovation and Opportunity Act (WIOA) describes the performance outcomes for adult education organizations 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 retainment, increase in average earnings, secondary school and postsecondary credentials attainment, measurable skill gain, and effectiveness in serving employers. Here are some of the ways that distance and digital education can help organizations meet these performance outcomes.

- Increasing student persistence and preventing student stop-out
- Increasing skill attainment necessary for work and postsecondary education
- Modeling and building digital literacy and independent, lifelong learning skills and mindsets 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 Digital Education

The EdTech 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. A remote instruction observation tool is available for administrators and teachers. The EdTech Center blog also includes useful articles and resources.

Administrative Considerations and Strategies

Activity 7.1: Administrative Support for Distance Education and Digital Education

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

Note that in the course, IDEAL 101: Foundations of Distance and Digital Education, this prompt is expanded into fully developed collaborative activities for your team to complete together.

Suggested Resources for Further Exploration

Please see Appendix A for a list of useful resources related to this topic that you may want to explore more.

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Appendix A

Suggested Resources for Further Exploration

This is a compilation of the suggested resources for further exploration from each chapter in the Handbook.

Acknowledgments

EdTech Center @ World Education – The EdTech Center @ World Education advances digital equity to enable everyone to thrive as learners, workers, family members, and community members in today's increasingly tech-enabled world. It supports organizations and communities to use technology to increase the reach and impact of education and other humanitarian initiatives.)

IDEAL Consortium Community of Practice – The Innovating Digital Education in Adult Learning (IDEAL) Consortium, a project of the EdTech Center @ World Education, works to support quality technology-enriched instruction in adult education and literacy programs across the United States. For over 15 years, the IDEAL Consortium, previously Project IDEAL, has provided technical assistance, web-based tools, and publications to member states to help them design distance, blended, and HyFlex learning options.

Chapter 1 – Setting the Stage

NRS Tips: Adult Education Participants in Distance Education – This page includes a tip sheet that summarizes key points such as definitions and reporting for adult learners participating in distance education.

Pew Research Center Internet, Broadband Fact Sheet – Includes data to show how adults in the United States access the internet, use the internet, and use smartphones to access the internet.

Closing the Digital Skill Divide Report and State Fact Sheets – Features a report highlighting the need for digital skills across every industry and state digital divide fact sheets.

Chapter 2 – Recruitment

Using Plain Language in Outreach Communications Guide and Video – Provide strategies for ensuring your communication with potential and current learners meets their needs and is easy to understand.

The Journey to Enrollment – Recruitment and Service Strategies for Adult Education – This workbook from the National Reporting System's virtual training shows adult education programs how to map their learners' journey throughout the recruitment and enrollment process.

Chapter 3 – Assessing Readiness

ESOL Placement Oral Screening Form – Seminole State College developed this sample placement tool for English language learners.

Habits of Mind Self-Assessment Rubric – The Institute for Habits of Mind developed this self-assessment tool that learners can use to informally gauge soft skills.

Teaching Skills that Matter in Adult Education – The U.S. Department of Education, Office of Career, Technical, and Adult Education developed a toolkit, including lesson plans, that supports adult learners to develop nine key skills using approaches that work across five key topics.

Personal & Workplace Success Skills Library – World Education's searchable repository of tools to support learners' success includes assessment tools, advising and career coaching resources, instructional materials, skills frameworks, and more.

YWCA National Capital Area Learner Readiness Survey – This short survey was developed in Google Forms specifically for intake in adult basic skills programs. It covers a range of readiness areas, including study environment, time available for distance learning, access to devices and the internet, and how students problem-solve.

YWCA National Capital Area Motivation Inventory – This short survey may help you understand a learner's current motivation and commitment to working independently. You could use the survey results as the basis for a conversation during an intake session.

Penn State Self-Assessment – This brief quiz asks questions about time management, study skills, personal organization, and technical skills. The quiz offers feedback that teachers can use as the basis of a conversation about readiness.

BRIDGES Digital Resilience Toolkit – The EdTech Center @ World Education created this toolkit with adult educators across the country. It includes a variety of checklist templates that can be adapted to self-assess and monitor learner progress around sets of skills relevant to common goals, including this set of checklists which organizes competencies aligned to goals common for diverse user types. These checklists can be used by teachers and learners both to self-assess and to monitor learners' skill strengths and gaps. BRIDGES

also includes instructional resources and supporting guidance to help teachers shape digital skills instruction that will help learners build digital literacy.

BRIDGES Digital Skills Framework – This framework is designed to help address the inequities that learners face when they have limited access to technology and therefore are less able to accomplish common tasks in work, schooling, and daily life. The BRIDGES Digital Skills Framework includes 75 skills across 10 domains organized into three overarching categories and subtopics.

Digital Navigator Resources website – The Digital US website features tools that Digital Navigators or other practitioners can use to meet the needs of learners

Northstar Digital Literacy Assessment – This popular and free digital literacy assessment was developed specifically for use with adult learners to assess essential computer and software skills. The standards on which the assessment modules are based were developed by librarians and adult education and workforce development practitioners. Each of the available assessments takes about 30 minutes to complete. Programs could choose which assessments are most relevant to their learners' goals and the distance education program.

Digital Skills Library – Managed by the EdTech Center @ World Education, the Digital Skills Library is an open repository of free learning resources designed to help all adult learners develop the digital skills needed to achieve their personal, civic, educational, and career goals.

Digital Literacy Self-Assessment Tool – The EdTech Center @ World Education created this tool, which can be adapted to meet the needs of your learners.

Digital Skills and Access Survey – This Google Form can be used to assess digital skills and access to technology.

Digital Literacy Skills Checklist – Briya Public Charter School educators went through a comprehensive process of identifying the skills that learners need to effectively participate in remote instruction based on the technologies they were using. They then developed this checklist to support educators and learners to track skills to ensure learner readiness.

Laptop Loan Agreement – The Dover Adult Learning Center developed this agreement for adult learners who are borrowing laptops from their program.

EveryoneON – This site provides information on where learners can access lower-cost technology, internet, and training.

Distance Learning Technology Access Survey – This survey developed by the YWCA National Capital Area can be used to get a sense of your learners' technology access and digital literacy needs.

Northstar Digital Literacy Screener – This print-friendly screening tool can be used to assess learners' understanding of basic computer skills.

Chapter 4 – Orientation

Learner Goal Setting Forms – ESL Workplace Context – An example of a learner goal setting form that could be completed by the learner or completed with an educator.

Learner Interview Goal Setting Form – Any Context – An example of interview questions that could be used to identify learner goals.

Sample Learning Contract – This learning contract developed by Northern Shenandoah Valley Adult Education outlines expectations for learners, support they can expect from their instructor, and expectations for behavior.

Mobile Hotspot and Device Agreement – This agreement by Northwest Michigan Works is an example of a user agreement between a learner and the program for the distribution and use of mobile hotspots and device agreement.

Digital Navigator Playbook – Digital US developed this comprehensive guide to help programs establish and improve their Digital Navigator services.

Upskilling New Americans: Innovative English Training for Career Advancement – This report includes an example of how one program offered a robust remote onboarding and orientation process.

Chapter 5 – Instruction

The What, Why, Who, and How of Blended Learning for Adult Basic Skills Learners – This guide by David Rosen and Jen Vanek and published by New Readers Press helps program explore a blended learning approach by presenting descriptions of different blended learning models and offering examples showing why they are employed to meet particular programmatic goals.

Student Internet Survey – This sample survey by David Rosen can be used to determine learners' access to the internet and experience completing certain tasks using technology.

Teacher Tools Listing – CrowdED Learning created a listing of edtech tools teachers can use for communication, instructional content, assessing learning, and managing and sharing assignments.

Triple E Framework – A framework teachers can use when designing learning that focuses on what students do with the technology to help them learn. It includes focusing on student engagement and how their learning is enhanced and extended by technology.

Triple E Framework for More Effective Technology Integration in Adult Education – This blog article by adult educators Susan Gaer and Kristi Reyes shows how the Triple E framework can be used in adult education instruction.

Resources to Support Mobile Learning – The EdTech Center @ World Education has a bank of resources to support educators who want to increase or enhance learners' mobile learning opportunities.

EdTech Strategy Toolkit – The EdTech Center @ World Education developed a resource to help educators create and maintain edtech routines by identifying technology they can use to build these routines.

Digital Resilience in the American Workforce – Includes resources to encourage building learners' digital resilience, including a self-assessment reflection roadmap, playbook, edtech routines, templates for ABE, ASE, and ESL topics, and instructional resources. DRAW is an initiative from Jobs for the Future (JFF), World Education, and Safal Partners, with support from the Office of Career, Technical, and Adult Education (OCTAE).

Top Instructional Strategies for Digital Resilience – This webinar from EdTech Center @ World Education staff Alison Ascher Webber and Jamie Harris shares top instructional strategy findings, best practices, and resources from the DRAW project.

Criteria for Choosing EdTech Tools – This page includes criteria educators can use to evaluate EdTech tools' effectiveness.

The Change Agent – This online magazine publishes the writings of adult learners on important topics such as racial equity, re-training for work, working and caring for children, voting, and mental health and includes resources you can use with learners that deepen the learning from the articles.

Creative Commons Licensing – Open Educational Resources often use these licenses to provide clear guidance to users as to what they can and cannot do with the resource.

SkillBlox –This platform is designed to simplify the process by which adult education teachers find quality free and open resources. It includes thousands of activities for adult learners that are searchable by skills frameworks and key words.

EdTech Maker Space – Adult educators have developed projects to create instructional materials and share strategies for using open education resources.

Digital Skills Library – Managed by the EdTech Center @ World Education, the Digital Skills Library is an open repository of free learning resources designed to help all adult learners develop the digital skills needed to achieve their personal, civic, educational, and career goals.

ESL Story Bank Lessons – Co-created by adult educators using stories from the Pre-Beginning and Beginning ESL Story Banks, CrowdED Learning offers instructors Wakelet collections with engaging instructional activities for English language learners

Ways to Transfer In-Person Activities and High Leverage Practices to Remote Instruction – Jayme Adelson-Goldstein developed this resource which provides examples of in-person teaching strategies, ideas for digital substitution, and how learners experience this on a phone.

Remote Instruction Observation Tool – The EdTech Center @ World Education developed a tool that can be used by teachers and their supervisors to provide a supportive review of

remote live instruction. It provides a structure for observation and reflective conversations to strengthen teachers' capacity for remote instruction.

Open Prompt Book from CampGPT – This resource provides guidance for teachers on leveraging GenAI to develop customized learning materials for adults. It includes sample prompts in several areas related to adult education.

The Guide for Design and Implementation of Hybrid–Flexible (HyFlex) Models in Adult Education – The EdTech Center has developed a HyFlex guide based on interviews with 25 teachers and observations of the HyFlex model.

HyFlex in Adult Education Video Series – This YouTube playlist features adult educators across the country showing key strategies and technologies they employ in their HyFlex instruction.

Chapter 6 – Assessment

R.E.A.L. Assessment Guide – Educators can use this guide to determine what to prioritize when assessing learning. It includes using assessment for these categories: readiness, endurance, assessed, and leverage.

Universal Design for Learning (UDL) – UDL guidelines include three principles when designing learning: engagement, representation, and action and expression.

Creating Accessible Educational Materials – The National Center on Accessible Educational Materials provides guidance on how educators can ensure their learning materials are accessible to all learners.

Blank Rubric Template – Use or adapt this template to create your own rubrics, so you and your students can evaluate learning using shared criteria.

Distance and Digital Education Definitions and Reporting Practices: What We Have and What We Need – This report describes findings from a survey of adult education directors of U.S. states and territories examining how they define the different technology-enriched instructional modalities available to learners in their state.

Chapter 7 – Administrative Issues

Community of Inquiry Framework – This framework represents the process of providing a learning experience that is collaborative and constructivist by developing three elements: social presence, cognitive presence, and teaching presence.

Example Digital Navigator Program – This site shows how Colorado is improving learners' access to digital devices and increasing digital skills through the use of digital navigators.

Digital Equity Act – The Digital Equity Act provides $2.75 billion to establish three grant programs that promote digital equity and inclusion.

Digital Equity Act Resources for Adult Education Programs – The EdTech Center's Transforming Immigrant Digital Education (TIDE) has Digital Equity Act information and resources for programs serving all adult learners.

EdTech Center @ World Education – The EdTech Center (ETC) @ World Education advances digital equity to enable everyone to thrive as learners, workers, family members, and community members in today's increasingly tech-enabled world. It supports organizations and communities to use technology to increase the reach and impact of education and other humanitarian initiatives.

Digital Leadership Academy – The Outreach and Technical Assistance Network (OTAN) offers this two-year-long professional development opportunity for adult educators in California that includes training in distance and digital education using resources from the EdTech Center @ World Education, coaching, and leadership training. While it is only open to California practitioners, it could be replicated at a state, region, or program level.

Adult Education Indicators of Quality Online Courses – The Virginia Adult Learning Resource Center has created a rubric that could be used to identify strengths and areas of improvement in adult education online courses.

Remote Instruction Observation Tool – The EdTech Center @ World Education developed a tool that can be used by teachers and their supervisors to provide a supportive review of remote live instruction. It provides a structure for observation and reflective conversations to strengthen teachers' capacity for remote instruction.

Appendix B

Description of an Effective Teacher

Source: Minnesota Adult Basic Education Distance Learning

General

- Highly digitally literate/competent, including confidence with 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
- Ability 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)
- Following distance learning naming conventions and data reporting requirements
- Developing (or using a previously developed) distance learning implementation plan
- Ongoing participation in distance learning professional development

Highly Recommended: Completion of IDEAL 101

Appendix C

Computer Skills Assessments for Teachers

Computer Skills Assessment for Teachers

Adapted from digital literacy self-assessments developed by SABES Program Support PD Center and the Outreach and Technical Assistance Network (OTAN)

This self-rating form is comprehensive and suitable for use in helping 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.

Access to Technology

1. Do you have a device for teaching that you can use at your local agency, satellite locations, and/or home (if needed)?
2. Do you have access to high-speed internet at your local agency, satellite locations, and/or home (if needed)?
3. Do you have access to other technology needed for the distance education program (e.g., smartphone, tablet, software, applications)?

For each of these areas below, please indicate your skill level integrating these tools/skills into teaching activities and your interest in attending professional development on this topic using the scales below:

Rating	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic

1	I have no experience, or I do not feel comfortable with this tool/skill.	Not interested
2	I have used this before a few times, or I am somewhat comfortable with this tool/skill.	Somewhat interested
3	I use this skill/tool fairly regularly or I feel comfortable with this tool/skill.	Interested
4	I use this skill/tool regularly or I feel very comfortable with this tool/skill.	Very interested
4	I use this skill/tool regularly or I feel very comfortable with this tool/skill.	Very interested

Basic Computer Operation

There are some basic skills and knowledge that both you and your students need to have in order to learn with technology, such as start-up steps, using the keyboard, printing, and troubleshooting simple problems.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Performing basic computer operations, such as managing files, using the toolbar, keyboarding, opening and closing programs, moving between programs, and printing		
Fixing minor computer problems, such as the computer freezing, not		

printing, or no sound coming from the speakers

Productivity Software

These tools allow people to perform various tasks, including creating written documents, graphs and spreadsheets, and presentations.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Using a word processing program (e.g., MS Word, Google Docs) to create a variety of documents		
Using presentation software (e.g, PowerPoint, Google Slides) to create presentations		
Using a spreadsheet (e.g., Excel or Google Sheets) for personal use and to automate administrative tasks, such as keeping a gradebook, making a budget, or graphing survey results		

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Locating, scanning, and manipulating graphics and saving them in a variety of formats		

Instructional Software

These resources include a wide array of programs, ranging from complete online curricula to those used for specific skill development, e.g., reading, writing, math, work skills, and ESOL.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Evaluating and using a variety of content-specific instructional software programs for specific learning purposes		
Regularly tracking and supporting student progress online		
Developing and aligning individual learning plans for students with particular software and the goals of the student		
Using a learning management system or a digital homeroom where		

students can access and submit assignments

Teaching online classes via webinars or video chats

Assistive Technology (AT)

These tools include assistive, adaptive, and rehabilitative devices. AT promotes greater independence for people with disabilities by enabling them to perform tasks that they were formerly unable to or had great difficulty accomplishing.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Creating learning resources that are accessible for learners with disabilities		
Making computers and other technology more accessible (e.g., making the cursor speed slower, increasing font size, or using text-to-speech software)		
Locating software such as graphic organizers and/or assistive devices, such as adaptive keyboards		

Using Online Resources

Many classes have access to and use the internet on a regular basis because adult learners need the skills involved for school, work, and daily life.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Using online resources on a regular basis; moving easily between websites for purposes such as research and communication		
Evaluating the content of websites for validity and appropriateness		
Creating and maintaining a website for information and communication		
Saving and sharing documents, bookmarks, and other materials online		

Communication Tools

People communicate using a variety of online technology tools such as email, text messaging, shared online documents, blogs, and social networking sites.

Area	My skill level integrating these	My interest in attending

	tools/skills into learning activities	PD on this topic
Setting up an email account and communicating via email, including attachments		
Creating or contributing to online discussions via a blog, wiki, discussion board, podcast, instant messaging, or social media		
Joining and participating in an online meeting (e.g., webinar, videoconference)		

Video Technologies

These tools include video cameras and other digital media tools as well as video editing software. These tools can be used to create both teacher- and student-generated videos.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Creating videos using a smartphone, camera, or tablet		

Creating a screencast video, for example, a video showing learners how to log in to a website		
Uploading/sharing video, for example, via Google Drive or YouTube		

Professional Development

Keeping up with and integrating technology into classrooms requires continuous learning and exploring. There are many ways you can continue to learn, including doing research online, subscribing to email lists, using X (formerly Twitter) or other social networking sites, talking to colleagues, attending conferences, and even using this self-assessment tool.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Participating in professional development courses or workshops related to integrating technology into the curriculum		
Using listservs (email discussion lists), blogs, social media, online courses, and other web-based resources		

Evaluating and Using New Technologies

One of the most challenging tasks you may face is simply keeping up with current technologies and choosing what is best to use in your classroom and program. Sometimes our students are way ahead of us!

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Having knowledge of and using technology tools to design and develop digital learning experiences and assessments		
Using features of a mobile device or phone, such as text messaging, web access, and downloading and logging onto apps		
Selecting technology appropriate for tasks; understanding and applying examples of how subject matter and technology are integrated into the teaching/learning process to facilitate student achievement, creativity, and innovation		

Social and Legal Issues

The instructor serves as a role model when it comes to using technology. This includes knowing and obeying copyright, privacy, and other computer and internet usage laws; modeling healthy habits while using computers; and thinking and talking about the role of technology in society.

Area	My skill level integrating these tools/skills into learning activities	My interest in attending PD on this topic
Knowing about internet safety, privacy, and security; digital footprint; and online reputation		
Knowing strategies for identifying misinformation and fake news and their impact of daily life		

Appendix D

Tool to Assess Learner Readiness and Supports Needed

Many IDEAL organizations use a survey as a counseling tool with prospective distance learners. Since blended learning most often includes similar aspects, the survey could be adapted for its use. A learner completes the survey in person or online and then discusses the answers with the counselor to identify areas where supports may be needed. In the following example, a "c" answer indicates the person most likely needs little support for the topic; the "a" answer suggests the student may need substantial supports for participating in a distance program. 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 a quiet place is available.
   c. Yes, a quiet place is 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 (for example, 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. When it comes to accessing the technology I will need for this course (for example, a computer, tablet or smartphone, and an internet connection):

a. I am not sure where I will find the technology I need.
b. The technology is easily available, but not at my home.
c. The technology is available at my home.

5. When I am asked to use a computer or other technology like a tablet or smartphone:

a. I don't feel good about it and I avoid doing it.
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.

6. 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

7. When a teacher 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

8. Face-to-face interaction with my teacher and other students is:

a. Very important to me
b. Somewhat important to me
c. Not important to me

Appendix E

Tips for Teaching Distance or Blended Learning

Tips for Teaching Distance or Blended Learning

Below are some tips for distance teaching with adult learners.

1. Be prepared.

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

2. Be patient, firm, and flexible.

- Students will need to learn academic, digital literacy, study skills, and online learning strategies all at once.
- Provide clear directions.
- Make adjustments in order to meet learners' needs.

3. Try to really understand the learner's reasons for studying online.

4. Don’t judge a person by their writing in an email or text message.

5. Develop an online persona.

- Personality: Match their speed, expectations, and rhythm.
- Sense of humor: Remember that humor can be difficult to interpret without seeing facial expression and body language and knowing the person well.
- Curiosity: What do they mean by that?
- Educational presence: Be a resource for the learners’ questions.

6. Respond quickly and frequently.

- **Response time**: What can students expect from you? One or two 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**: Provide help resources for frequent content questions and technology problems.

7. Respond appropriately.

- Watch terms and expressions.
- Never promise something you cannot deliver.
- Protect anonymity.
- Do not 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 respond to and 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 or digital badges 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 website problems that affect everyone.

11. Set educational expectations.

- Set expectations for teacher and student responses.
- Gradually integrate a focus on grammar and spelling.
- Don't always jump right in to solve learners' problems. Allow productive struggle, ask questions to help guide learners, and provide support when needed to build learners' confidence and skills.
- Use Open Educational Resources (OERs).
- Ask about classes in the students' areas, and offer to find an organization near them.
- Remind students often about their goals and progress towards reaching them.

12. Keep yourself motivated, energized, and enthused!