Section 1

Programmatic Planning for HyFlex Learning Before Implementation

Why Programmatic Planning Is Important

HyFlex models, at least at this point in their development, are not ”plug and play.” They require careful programmatic and instructional planning, including planning for hardware and software purchases that align with the goals of the model, planning for professional development, and teamwork for teaching colleagues. Ideally, they begin with a pilot of a limited number of classes or teachers (or even one class or teacher), and then refine the model before it is scaled up. They also benefit, in both planning and implementation, from formative evaluation that provides feedback to the teaching team for program improvement. (See Program Evaluation.)

Planning Time Considerations

You 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 best suit these different goals.

Planning Elements

Physical Classroom Hardware Setup

One goal for planning classroom hardware setup must be addressed first: audio and video that allows all learners, “Roomers” and “Zoomers,” to hear and see each other and the teacher. The physical setup of the classroom will depend on your hardware and software or, if you can increase your budget, what you may be able to purchase. For example, if you have an inexpensive video tracking device with built-in speakers and microphones for a small room with a few students who are seated at one or two tables or in a small semicircle, this may be sufficient. See Figure 2.

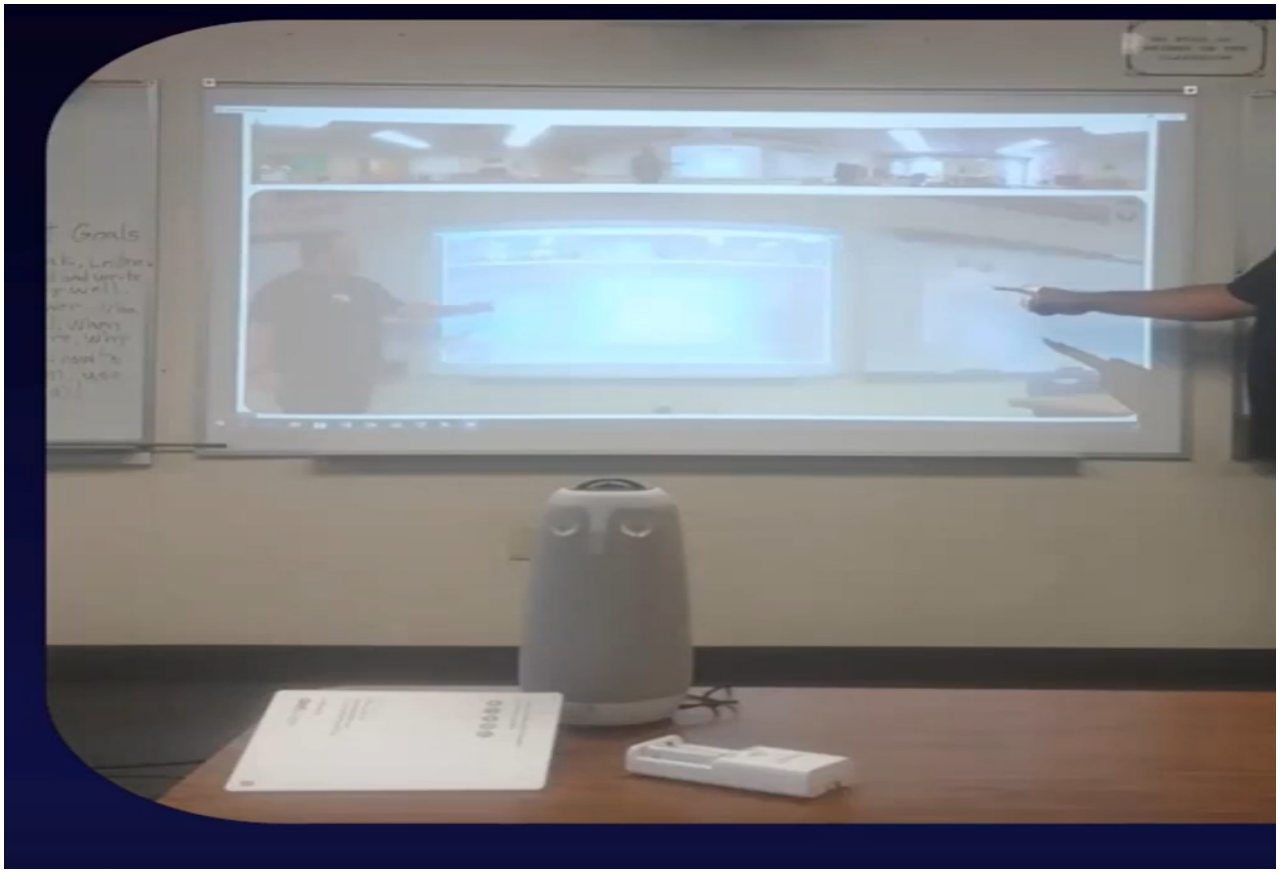

Figure 2 and 2a. Small Room HyFlex classroom using a video tracking device with built in speakers and microphone Used with permission from: Outreach and Technical Assistance Network/OTAN. (2021). OTAN Tech Talk - Simultaneous Instruction Using the HyFlex Model [video]. https://www.youtube.com/watch?v=F-iYKoEFrXU)

If you have wall- or ceiling-mounted video tracking cameras with ceiling-mounted speakers and microphones that can capture sounds from anywhere in the classroom, as pictured in Figure 3, you may be able to easily meet the hardware goal without further challenges.

Figure 3. Wall- or ceiling-mounted video tracking with ceiling-mounted speakers and microphones
Image source: David Howden. (2021). HyFlex Model in Adult Ed: Tips on Technologies & Strategies. [Presentation]. https://edtech.worlded.org/strategy-session-resources/

However, even then you may have additional challenges in how the hardware is used if your hardware tracks sound and motion and its settings are too sensitive. Whatever classroom setup you choose needs to address not only traditional in-person needs but also the needs of remote learners. We recommend that teachers and administrators try out their hardware in planning or a small pilot before scaling up. The EdTech Center has created a https://youtube.com/playlist?list=PLIMfSiUPpWPEIO1WXA3tTebNEz31ztrUB, which includes tours of technology used by two different HyFlex adult education classes.

Teacher Identification and Preparation

HyFlex teachers need to understand how this model differs from traditional in-person classes, online distance teaching, and other kinds of hybrid or blended models. As part of their preparation, you might ask them to read Brian Beatty's free online book, *Hybrid–Flexible Course Design* or participate in a HyFlex course from the IDEAL Consortium.

HyFlex instructors need to be competent in content delivery, comfortable and confident with technology integration, and sufficiently resilient and responsive that they can flexibly adjust when faced with technology challenges that may occur.

Risk takers who are courageous and curious in the use of technology are a good fit for HyFlex pilots. These qualities are desirable in addition to all the other skills you might expect of a good teacher.

Costs

There are usually three areas of cost for which HyFlex programs need to budget: hardware, software applications (seehttps://edtechbooks.org/hyflex_guide/ch6_hardware_software_applications_choices), additional instructional preparation and professional development time (see Section 4: Implementing and Scaling Up Flex Models). Software costs may be of three kinds: video conferencing software (e.g., Zoom or https://www.microsoft.com/en-us/microsoft-teams/group-chat-software); software needed to operate a tracking camera and/or speaker and microphone system; and Learning Management System (LMS) or Content/Course Management System (CMS) software. All of these vary from very low-cost, or even free, to expensive. They also vary in terms of how easy they are (or are not) for teachers to use. The EdTech Center's https://www.youtube.com/playlist?list=PLIMfSiUPpWPEIO1WXA3tTebNEz31ztrUB includes tours of HyFlex classrooms with teachers showing the technology they use. This may be helpful for envisioning what hardware and software may work best for your program.

Instructional Content Considerations

There are several issues to consider when deciding whether to design your own HyFlex course or curriculum, adapt an in-person course or curriculum that you already have found effective, or design your HyFlex model around a proprietary/commercial online course or curriculum.

Universal Considerations

- Do you have on your staff (or do you have a budget to hire) experienced curriculum developers who can design or adapt a course that can be delivered in all three modes, each of which uses the same set of content standards?
- Is your planning period long enough to develop and pilot your class curriculum before you need to scale up your HyFlex model?

Considerations When Designing Your Own HyFlex Course or Curriculum

- Can you use Open Education Resources (OERs) in your course, curriculum lessons or supplementary resources?

Adapting an effective in-person course

- Is this course based on a set of standards that can be used in modifying it for the online synchronous and online asynchronous models?
- Do you have on your staff, or can you get experienced curriculum developers who can modify your in-person course to be delivered in the other two modes?
- Is your HyFlex planning period sufficiently long to enable you to adapt and pilot your in-person course curriculum before you need to have a HyFlex model that you can scale up?

Choosing a Commercial Online Course

- Have you already used a particular asynchronous online course or curriculum as a distance education resource and found it effective with your learners or will you need to find one before you start? (If you have not already used a particular online course or curriculum, you may wish to consult with other HyFlex programs making use of a course or curriculum you are considering and whose learners are at the same level[s] and have similar needs as your learners. You could join a free adult education Flex Models Google Group [see description in the Appendix A], which includes adult education HyFlex program staff from across the country, and learn from their experience. You could also consult HyFlex model communities of practice [CoPs] in your state, or the free LINCS professional development system https://community.lincs.ed.gov/group/21.
- Can your program afford to purchase the online course and, if so, do you have a sustainable source of funding to continue its use once you create a HyFlex course around it?

Transitioning From Hybrid and Blended to Flex Models

Your program may already use a hybrid model, one that includes in-person and online modes, or a blended model, in which the two modes are highly integrated (i.e., both modalities are built upon the same content standards). When transitioning from those approaches to a HyFlex model, it is important to construct a course in which all modes are equivalent in terms of their quality and their ability to enable the same kinds of learning gains, regardless of the mode(s) chosen by learners. That does not mean that all modes will be identical in their learning activities.

It's also important to consider which mode, asynchronous or in-person, will drive the content standards of the other two modes. This doesn't mean that all three modes need to be exactly alike. Each mode may have its own strengths and affordances for certain learners; for instance, an immigrant learning English, especially one who already reads and writes English well, might find the in-person or online synchronous mode helpful in building listening and especially speaking skills because of the interpersonal communication that happens among learners and with the teacher; for learners who need a lot of practice in certain skills areas, such as numeracy or mathematics, having many more practice exercises in the asynchronous mode may be helpful.

Professional Development Planning

Regardless of how you design or choose your HyFlex course(s) or curricula, you will need to plan professional development opportunities and ongoing training and support, both for staff who administer program-wide HyFlex options and for teachers who will be building and leading the courses, so they can successfully implement the model. Special attention should be paid to training and building skills and knowledge of practitioners piloting the first HyFlex class(es). (For more on professional development, see Section 4: Implementing and Scaling.)

Learner Recruitment and Orientation

HyFlex programs use a range of options for recruiting and orienting students. Some do both entirely online; some offer both online and in-person options; and some offer primarily or solely in-person registration and orientation. We recommend, if possible, and in keeping with the underlying value of HyFlex models, offering both in-person and online registration and orientation options, as well as allowing learners to choose which they prefer. Many adult education programs use online forms to start the intake process and then continue to use the technology throughout the assessment and orientation process (Vanek et al., 2020). Programs that relied on remote orientation and recruitment strategies to sustain their work during the pandemic found that this made it possible to more efficiently use orientation time and reach more potential learners (Kallenbach et al., 2021). Examples of remote strategies to support these activities are available in the course https://edtech.worlded.org/transforming-distance-education, pictured in Figure 4.

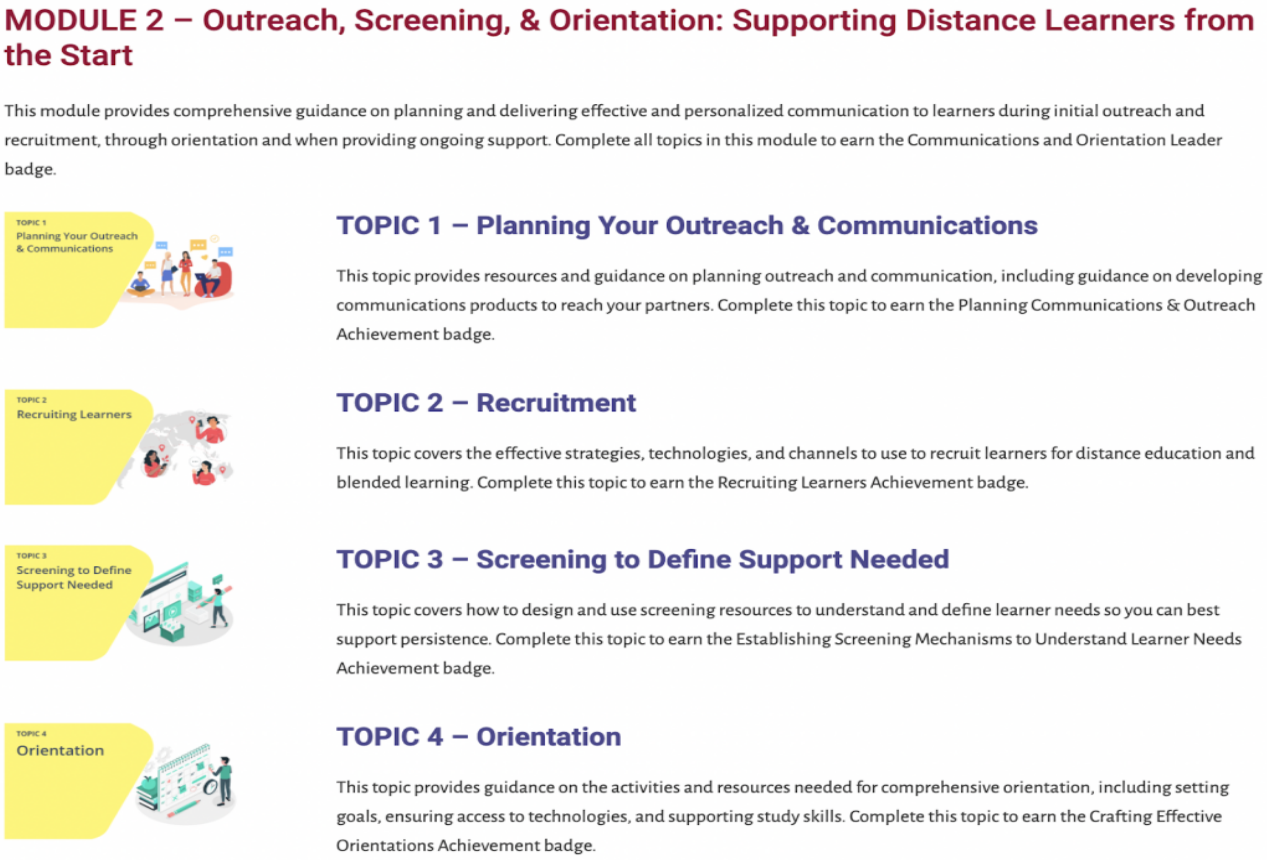

Figure 4. Transforming Distance Education Module 2 course topics (World Education, 2020)

Some learners, who are comfortable with technology and who plan to use primarily asynchronous or synchronous online models because they cannot regularly commit to in-person classroom learning, might be considering only a HyFlex class. These same students might not have been able to participate in orientation previously because of commuting or timing challenges, and the flexibility of this model might be a big draw for them. In-person orientation options should be maintained for learners who plan to solely or primarily learn in person and who especially need an in-person registration and orientation, perhaps including an orientation that involves a substantial digital literacy skills component to build the confidence, competence, and comfort they need to participate in a HyFlex model.

Technology Access/Support for Teachers and Learners

Both teachers and learners may have challenges in accessing needed hardware and software for full facilitation of, or participation in, HyFlex classes, especially from outside a classroom. Low-income Learners now have opportunities to get affordable internet access, discounts on home computers, access to free local digital literacy skills training, and other benefits that may reduce barriers to participation. EveryoneOn is one source of information on Internet Service Provider discounts that covers most parts of the U.S. Users can search this site for offers by zip code. The National Digital Inclusion Alliance lists https://www.digitalinclusion.org/free-low-cost-internet-plans/. The federally funded Affordable Connectivity Program (ACP), through which eligible individuals or families can receive a $30 monthly subsidy towards internet connectivity and $100 towards purchasing a computer, will operate for several years beginning in 2022 and may be of interest to some learners.

It might be useful to include a digital technology skills assessment as part of learner registration or orientation. For either teachers or learners, one possibility is the Northstar Digital literacy Assessment, which includes these assessment modules: *Basic Computer Skills, Internet Basics, Using Email and Windows (or Mac OS).* The free assessments do not include training for those administering them, the opportunity to award certificates, or access to curricula. However, teachers and programs can make use of the free and open assessments, which offer a results page

after a learner completes them. AFE (Adult Foundational Education) programs and adult schools can, for a fee based on the number of users, receive training, access to aligned digital skills curriculum, and the ability to award certificates to learners.

Conclusion

In this section we have briefly described the importance and recommended elements of program planning for HyFlex such as: classroom hardware setup; identifying and preparing teachers; professional development; costs for hardware, software and professional development; considerations when designing or choosing instructional content for each of the three modes; recruiting and orienting HyFlex learners; and providing technology access support for learners and teachers. We have also briefly described how HyFlex differs from other hybrid and blended learning models.

Questions to Consider

1. There are several planning elements listed in this section of the guide.
If you are exploring HyFlex, but have not yet implemented it: Choose at least two of the planning elements that stood out to you. Describe why you feel like these planning elements are important to you and/or your program as you develop a HyFlex class.

If you have already started a HyFlex class at your program: Choose at least two of the planning elements that you feel still need attention at your program and describe why these issues still need to be explored further.

Planning elements include: Physical classroom hardware setup, teacher identification and preparation, costs, instructional content considerations, transitioning from hybrid and blended to flex models, professional development planning, learner recruitment and orientation, technology access/support for teachers and learners.

2. How might you address the planning elements you identified in the previous question at your program?

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