

# Chapter 1 | Setting the Stage

## Introduction

This chapter will provide some 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 draw upon in conversation with adult education stakeholders and funders in your state. We will then set forth some shared terminology to be used throughout the handbook and get you thinking about how to proceed.

## Why build a distance education program?

In the United States, adult education programs enrolled 709,004 learners during program year 2020-2021 (National Reporting System, *n.d.*) Yet, this is only a fraction of the estimated 36 million adults in the United States who have foundational literacy needs or lack a high school diploma (OECD, 2013). 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.

The sudden onset of the pandemic and the rapid pivot that programs had to make to online instruction and support services highlights 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 students engaged in learning than those that had not set up distance education. Programs with lending initiatives in place were able to ensure that at least some students had access to laptops and hotspots. Programs that 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 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 & Rajendra (2020) note that blended models with the flexibility to adjust for future surges in the pandemic would be the new norm.

This heightened imperative demands that adult education programs provide more flexible and technology-rich opportunities for learners to build technology skills while simultaneously building foundational academic skills, a strategy proven to support learning (Jacobson, 2012; Newman, Rosbash, & Sarkisian, 2015; Rosin, Vanek, & Webber, 2017). Adding quality blended, HyFlex, or distance learning is a fine response to the reality described above.

## WIOA and Distance Education

Indeed, distance education is a named and prioritized initiative spelled out in the Workforce Innovation and Opportunities Act (WIOA), the federal legislation defining allowable programming in federally funded adult education (Workforce Innovation and Opportunities Act, 2014). The Office of Career, Technical, and Adult Education (OCTAE) 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).

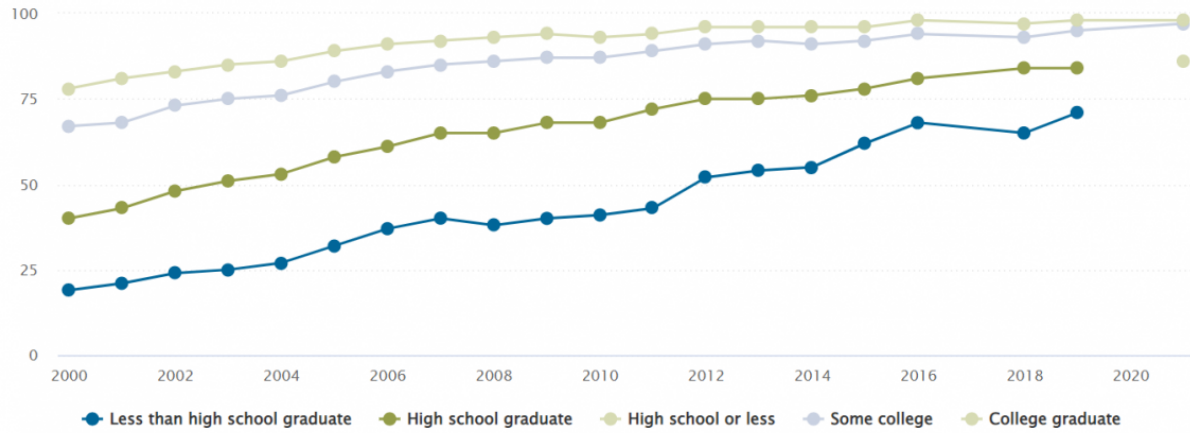
## Access

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, but is also conceptualized as a gap between those who can use available technologies to access information and solve problems and those who cannot (Emerging trends and issues: The nature of the digital divide in learning, 2000). There are certainly equity issues regarding access to the devices and internet. The Pew Research Center reports that only 57 percent of adults in households earning \$30,000 a year and 46 percent of adults lacking a diploma have home broadband (Pew Research Center, 2021a).

Furthermore, the Pew Research Center has found that smartphone use is on the rise with phones serving as the primary source of internet for 32% of adults with less than a high school degree (Pew Research Center, 2021b). The Pew Research Center also reports there is a wide gap between the percent 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 (Pew Research Center, 2021b).

1. Chart
2. Data
3. Share
4. Embed

% of U.S. adults who use the internet, by education level



Demographic	Any cellphone	Smartphone	Cellphone, but not smartphone
<b>Total</b>	<b>96%</b>	<b>81%</b>	<b>15%</b>
Total	97%	85%	11%
Men	97%	85%	11%
Women	98%	85%	12%
Ages 18 - 29	100%	96%	4%
30 - 49	100%	96%	5%
50 - 64	97%	83%	12%
65+	92%	61%	29%
White	97%	85%	11%
Black	99%	83%	15%

Hispanic	100%	85%	14%
High school or less	96%	75%	19%
Some college	98%	89%	9%
College graduate	97%	93%	5%
Less than \$30,000	97%	76%	19%
\$50,000-\$74,999	97%	83%	14%
\$75,000+	100%	85%	12%
Urban	98%	89%	9%
Suburban	97%	84%	12%
Rural	94%	80%	14%

**Source:** Pew Research Center, 2021b. (Survey conducted Jan 25 to Feb 8, 2021.)

These data, 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.

## Important Terminology

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.

## Distance, Blended, Hybrid, and Other Definitions

It helps to have a shared language to describe the work ahead, so we present these definitions for different approaches. Though 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 enough flexibility to understand that, though students might not be together with a teacher in a classroom, the benefits of blended or hybrid learning can be leveraged to support completely remote approaches that mix synchronous cohort classes (remote face-to-face

instruction, defined below) held via videoconference with independent or small group and asynchronous learning activities coordinated via group messaging/texting tools.

## 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 via mail, telephone, e-mail, or online technologies and software ([Implementation guidelines](#), 2021, 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 in fact 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 student's perspective of studying outside a classroom (Askov, Johnston, Petty, & Young, 2003) or, as suggested by the NRS guidelines, separated by time for the majority of the instructional period.

## 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 basic 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 use models for the online products:

### 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. E-S 5). Instructors consider both in-class and online instruction as part of a collective whole, making adjustments to their face-to-face teaching based on what they see as they monitor student 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).

## Hybrid Models

Hybrid models employ both an online curriculum product and in-class teaching, but though the teacher is checking it, the assigned work that students 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.

## HyFlex Model

As a result of the pandemic, the HyFlex model was adopted by an increasing number of adult education agencies (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 should be able 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 a guide and video series since this is an emerging instructional model for adult education agencies.

## Supplemental Models

Supplemental models make use of optional online curricula outside regular class time. The teacher does not require the student 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.

These definitions are more refined than our early conceptualization of blended learning in adult education, characterized simply as regular classroom instruction combined with distance learning, where distance is added to intensify or accelerate instruction (Petty, 2005; Porter & Sturm, 2006). Note also that some states or adult education programs use the term “hybrid” and “blended” interchangeably, and it is ultimately up to local programs and/or state leaders to use the language they think most effective in their context.

*Note that these models are still evident in a completely remote context—where the "in-class" part of blended learning takes place in a remote, face-to-face setting (e.g., a video conference).*

Over the past decade, we have realized that we need more flexibility in our understanding of what constitutes distance and blended learning because implementation and policy considerations in our member states vary greatly. We recognize that limitations on access to broadband make a narrower view of distance education inaccurate. There are many examples of programs, such as some in Texas and Maryland, that use paper packets so that learners living in places without broadband access can continue to learn. Furthermore, rigid conceptualizing around the timing of delivery of different modes of instruction can limit opportunities for learning. With that in mind, we present these definitions with an understanding that they may be attributed to programs that have very different characteristics.

## Other Useful Definitions

There are related definitions that are relevant to our work here but are not necessarily useful for planning distance education and blended learning programming.

### **Remote Face-to-Face Instruction (RFI)**

This 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 students with access to the internet and devices can choose to continue providing face-to-face instruction by using videoconferencing tools such as Zoom, Google Hangouts, or Skype. Whole groups of students 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.

### **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 students 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:

## #4 - Repurposed Time



[Watch on YouTube](#)

## Getting Started

### 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 will be using 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? What are their tech skills? When can they come to online and/or in-person class?
2. 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?
3. What technology resources can you share with your learners? What technology resources do they have access to on their own? How about teachers? What access do they have?
4. What are the technology skill levels of your learners? What skills would be required?
5. What are the technology skill levels of your teachers? What would be required? What resources are available to strengthen them?
6. 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?
7. What language do you use to describe the models of programming that you (will) provide?



## 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. Will you move forward with planning distance education or a blended learning option? Who might be ideal learners for the new course? What is the goal of the distance or blended learning program? Why are you doing this work? 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 Education and Blended Learning](#), these prompts are expanded into fully developed collaborative activities for your team to complete together.

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