Introduction

The content in this updated edition of the *IDEAL Distance Education and Blended Learning Handbook* shares strategies and resources to help programs implement distance education, blended learning, and HyFlex instruction. (HyFlex, short for hybrid-flexible, is defined by Beatty [2019] as a student-centered approach that allows students to choose among three types of classes: in-person, online synchronous, or online asynchronous). Whether you have years of experience as a distance education practitioner, only came to it because of the pandemic, or are entirely new to it, this guide can help you enhance your skills in providing distance education. The information we share is based on reports from programs across the United States about how they built on their pre-pandemic distance education and were spurred to innovate throughout the pandemic, a period of time that saw unprecedented growth in many forms of online learning.

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 and 2022. From 2016-2019, only about four percent of total learners were reported on NRS Table 4C, the optional table available to report distance learners. NRS data also show that, during those years, distance learners were reported to have 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 percent of all reported learners through distance education (National Reporting System for Adult Education, n.d.; Vanek, 2022). NRS data for program year 2020-2021 show an even larger increase, with 45 percent of reported **709,004** learners engaged in distance learning (National Reporting System for Adult Education, n.d.*).*[I] Table 4C has always been optional, so the surge is notable. It suggests that states were establishing policies and processes for implementing and reporting on distance education, so they can sustain their efforts in the future. It also shows us that many more adult educators in the U.S. have experience with online instruction, which bodes well for sustaining innovations that make programming more flexible.

This Handbook, the attendant course (IDEAL 101), and the development of the implementation plan that is part of the course provide the opportunity for proactive strategy 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 blended and distance education. The Handbook is informed by current and prior research, and policy guidelines and observations of effective practice documented by IDEAL Consortium members, past and present, and affiliated state leaders. IDEAL has served as a facilitator of collaboration and sharing of effective practice since its inception in 2002. The collective wisdom of past and current members is included here as the foundation for our interpretation 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 eighth edition of the Handbook is the fourth to be authored under the stewardship of the EdTech Center@World Education, Inc. 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 technology and attendant instructional shifts that support maximizing flexibility and personalization of learning, with a particular focus on equity.

The Handbook is organized around important programmatic considerations for setting up a distance education program or expanding options for blended learning. Each chapter supports you to develop practical plans for distance and blended education implementation. The end goal for readers is to craft a distance or blended education program planning document.

Chapter 2 | Recruitment: Identifying and Recruiting Students

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

Chapter 3 | Assessing Readiness: Determining What Supports Students Need to Succeed in Distance and Blended Learning

- Identify skills and technology access gaps that you need to support if learners are to succeed.
- Ensure 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.
- 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 designed to help teachers and administrators plan and implement a new distance education program or improve an existing program.

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

Together, the chapters provide structure for creating or revising a distance education implementation plan for your adult education program. Now is the time to reflect on your past work in this area (both prior to and/or during COVID) 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 education program systematically, considering each aspect of distance and blended education programming defined in this Handbook. As you read, please keep the following points in mind.

- **Don't lead with technology.** Do consider all aspects of educational programming, using a holistic approach to program development or improvement. 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 the time they are assessed.
- **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. 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 one primary communication tool (e.g., WhatsApp, Remind, email) and one venue for organizing and delivering content (e.g., Google Sites, Canvas, Moodle).
- **Provide adequate training and support for teachers.** Provide staff with the support, training, and time they need to put your plans into practice. Keep looking to expand quality programming with professional development. If you have an existing distance education program, use the Handbook with new instructors and administrators. It can help them consider the issues they need to address in order to implement your distance education program.
- **Keep reinventing.** Technology is a dynamic beast! Both the technological demands faced by your learners and the learning resources available are constantly changing.
- **Focus on equity from the beginning of your planning.** Every adult learner in your state deserves equitable access to the skills and technologies required to participate in flexible and personalized learning. Be sure to 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 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 end up with a useful and implementable distance 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 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—meet once a week on Zoom; work together in Google Drive so that you can collaborate asynchronously and see each other's work.

… within existing programs

We believe that teachers or administrators new to distance or blended learning—but coming into established programs —need to understand the ways that teaching in such models differs from strictly classroom programs. Furthermore, all teachers 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. And of course they need to develop skills for teaching in a distance learning environment.

A good first step would be to review the list of teaching and technology skills for distance teachers in Appendix A and Appendix D. The appendices provide the new teacher with both a deeper understanding of what distance (and to some extent blended) teaching entails, and a chance to reflect on the skills 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 for generating ways to provide appropriate training and support.

The readings in this Handbook are another useful resource for new teachers. They provide insight into the major areas involved in delivering distance education to adult learners and offer concrete examples from experienced teachers. If enrolled in IDEAL 101, these new teachers should follow the set of activities in the course for existing programs. These activities require the participant to review the distance education plan developed by the original distance teachers and administrators as part of their IDEAL 101 course and then, working with administrators (if they are new teachers), complete the activities by incorporating any fresh ideas they might bring to distance education programming.

Following this process, an adult education organization can continuously update its distance education implementation plan. It may also be helpful to have the experienced teachers in an organization informally mentor new distance teachers and help them make the transition from classroom to distance or blended teaching. New (and experienced) teachers would also 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, both technology-supported online 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 of the 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 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 education and blended learning. Our predecessors in this work, Leslie Petty and Jere Johnston, elegantly noted in the introduction to the fourth edition:

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

The words ring true today and, 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, 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.

Jen Vanek, Destiny Simpson, Jamie Harris, and Jeff Goumas

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