

Chapter 4 | Orientation

Setting Up Learners for Success

Introduction

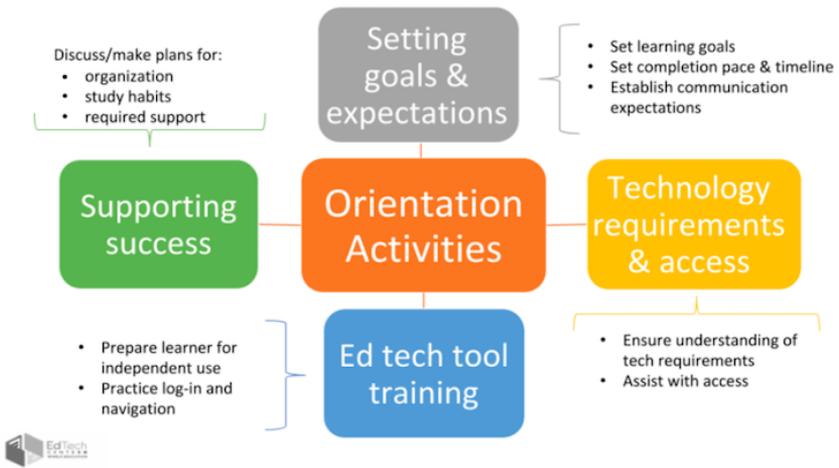
Many distance educators assert that orientation is a key component of retention. In a longitudinal experimental study, Porter and Sturm (2006) found that learner persistence in distance education programs was connected to the quality of the orientation received prior to instruction. A key attribute of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

Orientation can also be a time when teachers help students set goals for participating in the program and clarify expectations for course participants. Study skills, strategies for working independently, and computer skills can also be addressed. Finally, orientation provides a way for teachers to take care of "housekeeping" details, such as collecting contact information (e.g., a telephone number, email address, or Skype name).

Elements of a Solid Orientation

Some elements of 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 the curricular

materials, and course requirements are discussed. Orientation must also include activities that establish realistic expectations for distance study and provide students with a sense of how their distance learning experience will proceed. Additionally, the screening activities spelled out 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 most often do not have relevant history or experience with distance education.

Duration and Structure

How long should an orientation be? This depends on what an individual organization determines it needs to include. Some organizations may decide their students will be prepared after a single four-hour orientation. Others may decide that students need a

more comprehensive, multipart orientation adding up to 6 or 8 hours. A few organizations have created orientation programs lasting 12 hours (at which point the students can be officially designated as distance learners in NRS reporting ([See Technical assistance guide for performance accountability under the Workforce Innovation and Opportunity Act, 2019](#)). Each organization should determine how to structure its orientation to best prepare students.



Adult basic skills programs have offered both group and individual orientations for distance students. Group orientations are more efficient for the teacher and allow the student to meet others who will be working at a distance or participating in a blended learning cohort. 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 students who might need individualized support to prepare for studying online. Pennsylvania offers orientation via Adobe Connect, a webinar software. Using this technology, teachers can orient either a group or individual student to distance learning no matter how far they are from the school.

The rest of this chapter explores the following topics:

- Setting and monitoring learner goals
- Setting expectations for study time

- Accessing technology
- Determining the content of product-specific and technology training
- Helping students develop independent planning, organizational, and study skills
- Handling orientation at a distance

Identifying and Assessing Learner Goals

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

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 in which they can use goal setting to help guide their instructional planning. Asking questions

about goal setting means going beyond information required by the NRS (e.g., obtain a job, earn a high school equivalency diploma, and improve literacy skills). (See [Technical assistance guide for performance accountability under the Workforce Innovation and Opportunity Act, 2019](#).) These goals are a good starting point to guide students into the appropriate type of program (e.g., English language learning, high school equivalency diploma, or career pathways). However, to use goal setting as a basis for instructional planning, the goals need to be at a much more specific level—similar to what many educators call “objectives.”

This involves breaking up the larger goal (e.g., get a high school equivalency diploma) into smaller steps that the student can accomplish in a realistic time frame (e.g., learn the algebra required on the high school equivalency test during the next semester). These more specific goals or objectives provide the teacher with direction in planning educational programming to meet the students’ needs. They can help the teacher select the appropriate materials for students and provide more tangible, incremental milestones. Additionally, it may be helpful for the teacher to periodically revisit the goals with students. This allows the teacher and students to assess progress, adjust the instructional plan if needed, and refine the goals to reflect the students’ growth. Used in this way, goal setting is not simply something required by reporting forms, but a valuable component of students’ educational plans. (See the dated but still useful Project IDEAL Working Paper 3, [Using Assessment to Guide Instructional Planning for Distance Learners](#), for more about this topic.)

Here are examples of goal planning resources.

- [Goals for Workplace - Education context](#)
- [Goal Setting Interview - Any Context](#)

Setting Expectations for the Class

Orientation is the ideal time to set the expectations for the distance learning class or the independent online portion of a blended learning model. This ought to include what the student is expected to do and what the student should expect from the teacher. This is the time to spell out in detail the course requirements. The questions that follow are designed to guide teachers in setting expectations for students.

Level of Structure

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

- Are there due dates for completing student 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 students will receive on their work. Licensed curricula provide opportunities for feedback through autograded quizzes and learning activities. In addition to this feedback, distance education programs must consider what other feedback and support they will provide by answering the following questions.

- How does the teacher respond to students?



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

Marking Progress

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

- Are students required to take progress tests embedded in the online curriculum they might be working on? If so, how and where will this be done?
- How and when will pre- and posttesting 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 learner 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 or videoconferencing information (e.g., Skype names). 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.
- 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. Applications like WhatsApp (using a Google Voice number) or [Remind](#) make it possible to send text messages without sharing a telephone number.
- Will you have virtual or in-person office hours? Identify when and where these will be held, taking into consideration that using web conferencing/phone tools 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 Facebook Messenger.

Formalizing Expectations

Many programs have had success with using a learning contract to make the responsibilities and expectations for both the teacher and

the learner clear. Teachers might use a contract, crafted to spell out the specifics and requiring a student's signature. A contract helps keep the student focused and increases the likelihood of staying engaged. Programs using this approach may find it necessary to renegotiate the contract at various points in the distance learning process. [Here is an example of a learning contract 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. The more clearly expectations for all parties involved are presented before the start of the class, the more smoothly things will operate throughout the class period. Be as specific as possible, following [this mobile hotspot and Chromebook user agreement example from NW Michigan.](#)

Technology Requirements and Access

New students need to know how to access learning activities and how and where they can access a computer if they do not have one at home. Additionally, if they are using their own laptops, tablets, or smartphones to access course materials, they might need additional support. You should ask learners to bring these devices to the orientation to be sure learning resources can be both accessed and realistically operated on them. If you are conducting your orientation completely remotely, start by using a digital technology that the students feel comfortable using. For some students, this might be a phone call. Many students are likely using WhatsApp, so you might use that as a way to send demonstration videos that show how to use other technologies you plan to use for your instruction.

It may be helpful to provide students with a “quick reference” sheet

listing pertinent information (e.g., contact information for the teacher, step-by-step instructions on accessing the online component of a curriculum, and the address of a website linking to supporting online activities) for later reference.

Curriculum-Specific Training

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

Orienting Learners at a Distance

Planned Pure Distance Programming

Most of this chapter has discussed orientation from the perspective of programs that conduct face-to-face orientations for distance or blended learning. However, some states have pure distance education programs (e.g., Pennsylvania), where the majority of instruction is

delivered at a distance. The students find these programs either online, through a statewide referral service, or through another referral source. These students complete intake, assessment, screening, and orientation in person at a local adult education organization. Learners may also complete additional orientation activities at a distance. This may be done synchronously through webinars as well as asynchronously using online activities.

For example, Pennsylvania uses webinar technology to introduce students to the program, discuss distance learning expectations, and allow students to practice using the technology that will be used during the program's weekly online classes. Missouri has had students complete online activities that walked students through the steps of developing a distance learning plan and explored 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

Beyond the planned pure distance programming described above, there are times when it is not possible to meet in person. The National Immigration Forum supported development and implementation of a completely remote workplace ESL 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. For introduction of 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*](#).

Similar steps proved effective for countless programs that moved their instruction rapidly online because of the pandemic. A common pathway for introducing technologies was phone call to WhatsApp to Zoom to other educational technologies 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 of distance education to serve adult learners. Pure distance learning programs may find that additional orientation activities need to be completed at a distance to fully prepare the student for distance learning. Students should be supported by a distance teacher as they work through these activities.

NRS Requirements

Finally, orientations provided completely at a distance do not fit well with the NRS requirements if programs are seeking to monitor learner progress through NRS level gain. The standardized testing required for this is best accomplished in person, in a proctored setting. 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 also might allow proctored assessments of students in locations closer to their homes. In either case, the remaining orientation activities can be delivered at a distance.

It should be noted that OCTAE has granted some leeway on placement testing because of the pandemic, issuing in April of 2020 a new policy of “provisional placement” allowing teachers to use their expertise to place a participant into an established educational function level. It remains to be seen if allowances made to ease intake and reporting requirements during the pandemic will develop into policy shifts that better support remote orientation moving forward. [You can see the OCTAE policy memos here](#) and will read more about these policies in Chapter 6, Assessment: Student Participation and Progress.

Craft Your Orientation

Activity 4.1: Technology Training

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

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

Activity 4.2: Elements of an Orientation Plan

Begin to lay out the elements of an orientation plan for your distance education or blended learning program.

List the components you want to include and describe how you will implement each of them. Your plan should be geared toward 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.

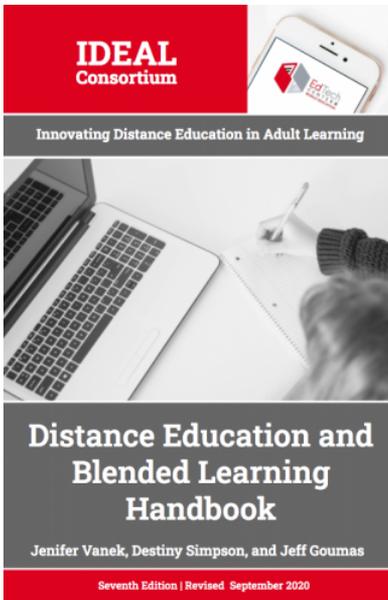
Note that in the course, IDEAL 101: Foundations of Distance Education and Blended Learning, these prompts are expanded into fully developed collaborative activities for your team to complete together.

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