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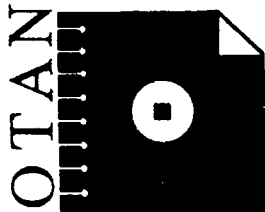
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ABSTRACT

The staff development component of the Outreach and Technical Assistance Network (OTAN) began the second year of operation with all 11 resource centers active. Constant emphasis and assistance was given to providing staff development through the centers. English as a Second Language (ESL) Institutes for Experienced Teachers were scheduled on a rotating basis; ESL Institutes for New Teachers were scheduled only in outreach areas. The two main components of the OTAN On-Line Communication System were electronic mail and a bulletin board for exchange of information. The outreach component provided technical support in research, design, and development of a technology-based adult basic skills program in areas of California where minimal or no apportionment services were provided. A two-county area in northern California was selected for the literacy consortium development pilot project. The archiving component was restructured to have two major parts: (1) a permanent hard copy record of State Department of Education-funded projects and other resource materials; and (2) an electronic storage and retrieval system of a wide variety of appropriate and relevant information for adult educators. Information posted online included selected codes and regulations, government documents in hot topic areas, and bibliographies of materials available in Regional Resource Center Libraries. (Exhibits include charts of training sessions, online subscriber profile, forum activities, and resource library usage.) (YLB)

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OUTREACH AND TECHNICAL ASSISTANCE NETWORK

TWO YEAR EVALUATION REPORT

December 1, 1989 - November 30, 1991

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California Department of Education
Youth, Adult and Alternative Education Services
Adult Education and Job Training Unit
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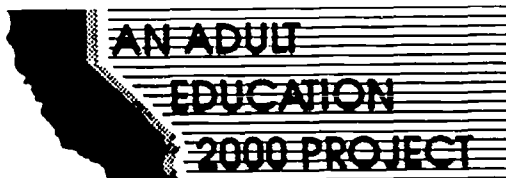
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Preface

Abstract of
OTAN Project
Objectives, Tasks and Activities
during the First Two Years

OTAN PROJECT, 1991



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Staff Development

The Staff Development Component began the second year of operation with all eleven Resource Centers active. Large amounts of resource materials have been purchased and state developed materials have been duplicated to make sure that the Resource Center libraries are true resources to the adult educators in their regions. There has been a constant emphasis and assistance given to providing staff development activities through the Resource Centers. Information regarding staff development activities has been disseminated by flyers and via OTAN E-mail. In some areas, activities continue to be slow in developing, while in others, training activities have been scheduled systematically throughout the year. ESL Institutes for Experienced Teachers were scheduled in a rotating basis through the regions. ESL Institutes for New Teachers were scheduled only in outreach areas such as Calexico and Red Bluff; this year the ESL Institute on Cooperative Learning was also disseminated by OTAN increasing the scope of training provided. Resource Center managers focused their energies in contacting CBO's and new 321 agencies. The project staff emphasized promoting all training activities by actively participating in local, regional, state and national conferences. The National Adult Literacy and Technology conference was chaired and organized by OTAN staff with the assistance of Resource Center managers.

Electronic Communication System

The OTAN On-Line Communication System is comprised of two main components. The first is electronic mail (E-Mail). E-Mail allows direct written communication between two or more users. The second component is the OTAN Forum which serves the function of a bulletin board and allows for the exchange of information across wide groups of users. Throughout the first two contract years, the system has grown and changed in response to on-going communication with system subscribers. New users are supported during the installation of their software through the use of an orientation video tape and a user's guide. This support system has worked well, and follow up is provided on an as needed basis through OTAN's 800 telephone service. The OTAN Networking and Archiving Managers work in partnership to guide the OTAN On-Line Communication System and provide for its efficient operation.

Outreach

The *OUTREACH* component's purpose is to provide technical support in the research, design and development of a technology based adult basic skills program in geographic areas of the state where there is a minimum or no apportionment services being provided. Project activities have been conducted under a subcontract to **Micro Methods**, a Berkeley based applied research and applications development firm, in concert with OTAN project staff. A two county area in northern county—Tehama and Glenn Counties—was selected as the site for the literacy consortium development pilot project. Planning activities with consortium members occurred over five months—November 1990–April 1991. In July 1991 a grant of \$200,000 was given to the two counties to begin project implementation.

Archiving

The Archiving Component, originally envisioned as a part of the Electronic Network System, was restructured so as to have two major components 1) a permanent hard copy record of SDE funded projects and other resource materials, and 2) electronic storage and retrieval system of a wide variety of appropriate and relevant information for adult educators. The Archive Manager works closely with the On-Line System Manager to ensure smooth and efficient operation of the total Electronic Communication and Information System.

The main activities of the Archiving Component are:

- Establish long-term procedures and policies for sharing of adult education products;
- Archive appropriate information and make it available to local adult educators through the OTAN On-Line Communications System;
- Establish and provide technical assistance to maintain circulating collections at the eleven OTAN Resource Centers;
- Organize an Adult Education Unit collection within the California Department of Education Library in Sacramento.

By the end of the second year, a manual of procedures had been drafted for processing documents to be retrieved electronically. Information posted on-line in the Adult Education Archives included selected codes and regulations and one hundred eighty government documents in twenty-two hot topic areas. Bibliographies of materials available in the Regional Resource Center Libraries and in the adult education historical collection in the California Department of Education were also posted.

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Staff Development

*Summary of
Staff Development Activities
provided through
Regional Resource Centers*

OTAN PROJECT, 1991

Objective #1

Administer OTAN Sites

Identify Needs and Priorities

The OTAN Resource Center Managers assessed the staff development needs of administrators, teachers, and support personnel in agencies receiving ABE 321 Federal funds. The questionnaire was mailed using the CDE "321 mailing list." Returned questionnaires were reviewed by the respective regional OTAN Resource Center managers.

OTAN Advisory Committee developed a new needs assessment instrument to be used by the Resource Centers.

Resource Center managers also gather needs assessment information during regional meetings and at network meetings. Staff development priorities and programs were identified based on information gathered from questionnaires and meetings. All agencies in the regions had opportunity for input as to the "what, where, and when" pertaining to the scheduling of staff development programs and/or technical assistance.

An 800 telephone number was established at the OTAN Central Office in La Puente to accommodate requests from the field for products and services. The monthly reports from the Phone Company indicate the increased use of the 800 number over the Project Second Year¹.

Plan Staff Development Program

The OTAN Staff Development Manager has compiled calendar information for workshops, technical assistance services, conferences, and other meetings of interest. The information provided on-line in the Calendar icon was based on information gathered from a variety of sources including organization journals, special groups, etc.

Two types of brochures were prepared and distributed to inform and motivate adult educators. The first was a brochure about the OTAN Project and its services. This is now in its fourth edition and highlights the increase in services and products available as the different objectives and tasks have been put in place during this first year. The brochure emphasizes the 800 number, and highlights programs and services available at the regional OTAN sites such as site visitation, classroom observations, administrative consultations, resource libraries, and the electronic network. The second brochure features a list of the most popular staff development activities, in order to generate training ideas in the field. Brochures advertising CBE Training Packets and Videos and the ESL Starter Kit which were prepared by previously founded "310" staff development projects are also distributed to the field as well as brochures announcing the scheduled sessions of the ESL Institutes for New and Experienced Teachers and for Cooperative Learning.

¹ See Exhibit A

Provide Resources to OTAN sites for Local Staff Development and Technical Assistance

The OTAN Staff Development Manager processed requests for regional or sub- regional workshops, presenters, on-site consultants, and the payment of consultants fees and expenses. Contracts were prepared for funding of requests and payment of services. All administrative paperwork, contracts, board approvals, travel arrangements, payments, and follow up were prepared by the OTAN Staff Development Manager.

Develop evaluation process for sites and network

The OTAN Staff Development Manager worked with the OTAN Resource Center managers to develop an appropriate staff development evaluation process. Evaluation sheets were given to participants at all training sessions and these were compiled and submitted by the Resource Center managers to the OTAN Staff Development Manager. These have been compiled into an end of the year summary. Resource Center managers have also compiled and submitted quarterly reports to the Central Office. These reports are reviewed by the OTAN staff, advisory committee and CDE Consultant. The Staff Development Manager has also worked with the Outside Evaluator (ETI) to assist in their evaluation design and process.

Monitor and evaluate technical assistance provided through sites

The OTAN Staff Development Manager and Resource Center Managers have maintained a log of phone requests. Records have been kept covering OTAN Resource Centers' classroom observations, administrative visits, library activity and/or workshops.

Establish Links with other CDE funded programs

The OTAN Staff Development Manager maintained regular and consistent contact, regarding staff development resources and activities, with all CDE-sponsored programs, including ETI, CASAS, ESL Institute, ALIT Institute, Leadership Training Institute, and Adult Education Planning and Research Institute. These linkages were used for marketing and sharing of OTAN project services. Linkages were also established with other non-public school agencies who receive Federal 321 funds, including Sierra Conservation Corps, and Community Based Organizations (CBO's), Departments of Developmental Services (DDS), Corrections, and Workplace literacy programs.

OBJECTIVE #II

Assist SDE to Identify New OTAN Sites

Identify potential OTAN sites

The OTAN Staff Development Manager assisted SDE field consultants in developing selection criteria and process, developing and mailing the applications, processing the applications, visiting all new site applications.

Establish New Sites

The OTAN Staff Development Manager worked with the new sites with a "self-evaluation study" to identify existing resources and areas of need. Technical assistance was targeted to identified needs. The OTAN project provided funds for the purchase of necessary hardware and software to link new sites to the OTAN On-Line System and for the purchase of materials to establish Resource Libraries.

OBJECTIVE #III

PROVIDE TECHNICAL ASSISTANCE

Provide local staff development/technical assistance

The OTAN Staff Development Manager coordinated with and/or assisted OTAN Resource Center managers in providing local workshops (regional or sub-regional), presenter, on-site consultants. Staff development and technical assistance emphasized implementation of CBE in adult education programs, alternative instructional methods, variety of classroom settings, using technology in the classroom, and strategies to reach diverse populations.

Provide for the Dissemination of Products

Resource libraries were established, enlarged and maintained at the all OTAN Resource Centers, for the review of previously developed training modules, video programs, as well as commercial and teacher-made materials, and for the circulation of current resource documents. The OTAN Staff Development Manager coordinated and promoted the dissemination of products developed through CDE funded projects, such as, CBAE Staff Development Guides, ESL Starter Kit, and ESL Institute Teacher Training videos and workbooks. Each OTAN Resource Center also facilitated dissemination of new and existing products generated by CDE-funded projects.

OBJECTIVE #IV

Develop Centralized System for Dissemination

Establish Centralized System

The OTAN Staff Development Manager assisted the Network Manager and the Archive Manager in developing a wide area computer network to act as centralized electronic dissemination system for adult educators. (See "Development and Dissemination of Learning Resources" Workplan). The network consists of: 1) an electronic "Forum" capable of disseminating resource information to adult educators, and 2) an "Electronic Mail" component (OTAN On-Line) to provide communication links between adult educators, offices and projects.

The original proposal anticipated expansion to California adult education 321 programs only, but has grown rapidly to expand to other interested parties and outside the State of California.

Provide OTAN Sites Staff Development Training in the Use of Educational Technology

The OTAN Staff Development Manager coordinated training related to infusing technology into the OTAN Resource Center programs. Training was provided by Project staff and outside consultants at the regional OTAN Resource Centers and in workshops held at several other sites in the state and at several appropriate workshops and at the Adult Literacy and Technology Conference co-chaired by OTAN Staff Development and Network managers.

Development & Dissemination of Learning Resources

Summary of OTAN Communication System Activities

OTAN PROJECT, 1991

Objective #1

Design and Develop a Statewide Adult Educator Electronic Mail System

Identify Needs

A full needs analysis was completed during the first contract year. This process was conducted using a field based consortia to identify perceived user needs.

Make recommendations to SDE and Network Users

Based on the surveyed needs of users conducted during the first year the OTAN Network Manager met with California Department of Education, Adult Education Unit staff and recommend contacting with Connect Inc.

This Contract was entered into during the first project year.

Purchase Software

During the first contract year software was purchased by OTAN and provided to the first twenty users as a pilot. This group consisted of the OTAN Resource Centers, the California Department of Education, Pacific Management and Research Associates, Association for California School Administrators, California Council for Adult Education, the Adult Literacy Instructors Institute, and Comprehensive Adult Student Assessment System (CASAS).

Subscribers who joined the system after the pilot period purchased the software from OTAN for \$99.

Provide Training and Technical Assistance

User training and support is an on-going task for OTAN personnel. This training is conducted through a variety of channels. Beginning and advanced user training sessions have been conducted at various conferences including the Competency Based Education (CBE) Conference, California Council for Adult Education (CCAEE) Conference, and the International Adult Literacy and Technology (ALT) Conference.

Training and user support is also conducted on-line via E-Mail and over the telephone utilizing OTAN's 800 phone service.

Develop and Implement a Marketing System

Marketing of the OTAN On-Line Communication System has been conducted through direct mail to adult education agencies in California, through participation in conference exhibit areas, and through publication of articles in education journals. The popularity of services provided on-line has also led to positive word-of-mouth promotion.

The success of the marketing effort has led to total sales of OTAN software to 418 subscribers during the first two contract years.

Evaluate Implementation and Usage

Evaluation activities have been carried out by OTAN personnel throughout the contract period. Evaluation has included a survey of all system users. The results of this survey were compiled and are used by OTAN staff as additions and improvements to the on-line system are considered.

Connect also provides OTAN staff with full monthly reports reflecting usage levels of the on-line system.

Objective #II

Design and Develop Bulletin Board System (OTAN BBS) for an Adult Education Electronic Dissemination System

(changed to "FORUMS") and later expanded as an ARCHIVING component of the OTAN Project.

Identify Information Needs

A full needs analysis was completed during the first contract year. This process was conducted using a field based consortia to identify perceived user needs. This process focused to a large degree on the user interface and the types of information to be included on the service.

Make Recommendations to SDE Adult Education Unit and Network Users

Based on the surveyed needs of users conducted during the first year the OTAN Network Manager met with California Department of Education, Adult Education Unit staff and recommend contracting with Connect Inc. This Contract was entered into during the first project year.

Purchase Necessary Software

During the first contract year software was purchased by OTAN and provided to the first twenty users as a pilot. This group consisted of the OTAN Resource Centers, the California Department of Education, Pacific Management and Research Associates, Association for California School Administrators, California Council for Adult Education, the Adult Literacy Instructors Institute, and Comprehensive Adult Student Assessment System (CASAS).

Subscribers who joined the system after the pilot period purchased the software from OTAN for \$99. A profile of agencies purchasing software is included as an exhibit in this report.

Build Bulletin Board Files

Forum (BBS) information is structured into various icons or information areas. These areas were defined based on user surveys. Through this Forum subscribers can locate a broad range of information ranging from conference and regional meeting information to public domain software.

The information provide in the OTAN Forum is updated regularly by OTAN staff. Information is also contributed by subscribers through the use of the Upload Area. OTAN maintains a subcontract with the California Council for Adult Education (CCAЕ) to input designated forum information including legislative information, course outlines and lesson plans, and information articles.

Micro Methods OUTREACH

Summary of Micro Methods OUTREACH Activities

OTAN PROJECT, 1991

Introduction

The *California State Plan for Adult Basic Education* guides the policies and programs for the expenditure of Adult Education, P.L. 100-27 funds. One of the identified Demonstration Grants programs is the provision of outreach and instructional services to counties not presently receiving state adult education funds.

The *OUTREACH* project, developed with technical support from the OTAN Project, addresses this objective. Resulting program designs presume a substantial focus on the use of instructional and distance learning technologies. The *OUTREACH* component's purpose is to provide technical support in the research, design and development of a technology based adult basic skills program in geographic areas of the state where there is a minimum or no apportionment services being provided. Project activities have been conducted under a subcontract to *Micro Methods*, a Berkeley based applied research and applications development firm, in concert with OTAN project staff.

The first year focus of this *OUTREACH* project was on two elements:

- Technical support for the English Literacy Plan Project (ELP).
- Planning and technical support for the adult basic skills program (ABS) with a substantial emphasis on the uses of instructional technology.

A minimal amount of resources was spent on these activities in 1990 because of their exploratory nature.

The second year (1991) activities have concentrated on the implementation of the ABS project. A two county area in northern county—Tehama and Glenn Counties—was selected as the site for the literacy consortium development pilot project. The Tehama-Glenn Adult Learning Consortium is the pilot project to establish an adult education consortium in an area of the state currently unfunded with adult education apportionment funds. The hypothesis is that by building a consortium from the beginning, the services to adult learners will be better planned and integrated and be more complimentary.

Planning activities with consortium members occurred over five months—November 1990–April 1991. Site selection for the project occurred in 1990. The two counties were selected based on criteria that favored areas in need of native language literacy programs and areas with sufficient service infrastructure to initiate the adult learning consortium concept. In July 1991 a grant of \$200,000 was given to the two counties to begin project implementation. The Tehama County Department of Education administers the grant.

The Tehama - Glenn Adult Learning Consortium

The goal of the Tehama-Glenn Adult Learning Consortium is to develop an integrated adult education and training service delivery system in the two-county region that accomplishes the following:

- extends adult basic skills learning opportunities to previously unserved geographical areas
- expands currently available learning opportunities for key target groups: displaced workers, displaced homemakers, limited-English speakers, and AFDC recipients
- offers a full menu of learning modalities including: home-based instruction, computer-managed individually-paced learning opportunities, one-on-one individual learning, and classroom support
- include: ESL, life skills, basic literacy, basic math, critical thinking skills, career orientation planning, supplemented by opportunities for ongoing individualized instruction relating to communication skills, keyboarding and computer literacy
- engages local employers in a collaboration to tailor learning opportunities to emerging labor market demands
- demonstrates the effectiveness of the integrated service delivery system by improving the quality of supportive services received by adult learners, by minimizing time spent in assessment activities.

The model is based on the collaboration of multi-agency, multi-county service providers and other interested parties. These interested groups are referred to as stakeholders.

Key stakeholder groups involved in the planning process have included:

- | | |
|---------------------------------------|-------------------------------|
| • the two county offices of education | • high schools |
| • community colleges | • JTPA programs |
| • GAIN representatives | • libraries |
| • community action groups | • volunteer literacy programs |
| • private sector representatives | |

The project is governed by an Executive Committee representing both counties and each provider group. This Executive Committee meets monthly and alternates its meetings between the two counties.

The project is staffed by a half time project coordinator and a full time information services specialist. Two VISTA volunteers provide support to the stakeholders providing direct learning services.

A key feature of the project is the use of an 800 number for persons to use to identify adult learning and support services. The 800 number (available till 9 p.m.) is the focus for project publicity. Persons wishing services call the number and based on an initial query of needs, the person is then contacted by the provider most likely to meet the needs.

Other features include experimenting with laptop computer to reach learners in very rural areas and to support voluntary tutoring. Laptops have not been used actively in teaching adult basic skills, yet they hold substantial promise to permit more flexible learning. The emphasis is on using adult appropriate learning materials rather than materials prepared for K-12 learners. This emphasis on andragogy² rather than pedagogy will be increased next year.

² Andragogy refers to the principals of adult learning that emphasize helping to learn over teaching. See for example Malcolm Knowles, *The Modern Practice of Adult Education: From Pedagogy to Andragogy*, Association Press, Follett Publishing Company, Chicago, 1980; and Steven D. Brookfield, *Understanding and Facilitating Adult Learning*, Jossey-Bass Publishers, San Francisco, 1986.

Specific Service Objectives

Specific service delivery objectives for the project are broken out by service populations and learning modality as follows:

| Service Population | Learning Modality | | | | Total |
|--------------------|-------------------|---------------------|---------------|------------------|------------|
| | Home Based | One-on-One Tutoring | Computer Labs | Worksite Program | |
| Remote Rural | 30 | 20 | 10 | 10 | 70 |
| GAIN | 40 | 70 | 30 | | 140 |
| LEP | 10 | 20 | 30 | 10 | 70 |
| Dislocated Worker | 40 | 20 | 20 | | 80 |
| Displaced | | | | | |
| Homemaker | 30 | 30 | 20 | | 80 |
| Other (walk-in) | 40 | 30 | 30 | 20 | 120 |
| TOTAL | 210 | 200 | 140 | 50 | 160 |

These service objectives form the basis for evaluation of the project performance. The service objectives are expressed in terms of adult learners served in addition to those currently served. The period of performance consists of a consortium development phase (January–August, 1991), the initial implementation – Phase I (Sept.–Dec., 1991) and Phase II (Jan. – June, 1992). Identification of “target populations” are approximations based on preliminary planning data and establish projected ranges of +20% for project outcomes specified in individual matrices; similarly, projected learning modalities reflect a rough estimate of range of service. Since service objectives are to make available to each prospective adult learner a “menu” of services and allowing individual choice among a variety of learning styles, expected variance from the projection is +30% for each cell in the matrix. There will be variance in projected sub-groups served and learning modalities used. But the overall performance objectives are expected to vary no more than 10%, i.e. provision of service to no less than 480 nor more than 610 adult learners. The provision of distance learning in the form of television programs and videotapes will be explored as part of the project.

Project Highlights

The goal of the Tehama–Glenn Adult Learning Consortium is to develop an integrated education and training service delivery system. To facilitate this the following workplan outline, developed by stakeholders and OTAN technical support staff, reflects the priorities for the project.

OUTREACH AND PUBLICITY

1. Recruit and train volunteers
 - Identify skills needed from volunteers e.g. electronics, child care, tutoring
 - Single phone number to contact programs and volunteers
 - Orientations and demonstrations for volunteers
 - Use TV, public spot announcements, community meetings
 - Use the 800 number as the point of communication
2. Outreach to Business Partners
 - Get to the person who makes decisions
 - Know how and why this would help business; what will motivate them to participate
 - Use marketing—media to reach employers
 - Take another business person with you
3. Outreach to Prospective Learners
 - Targeted radio, ads e.g. Hispanic radio stations, Catholic church for Hispanics
 - TV feature stories—target to:
 - ESL
 - Personal enrichment needs
 - Job seekers
 - Isolated areas e.g. Manton—post notices, local demonstrations of learning approaches
 - Parents via schools

INTAKE AND CASE MANAGEMENT

1. Standardize learner assessment
2. Standardize aspects of learner information collection

INSTRUCTIONAL STRATEGIES

1. Identify existing materials and sites
2. Identify current resources available e.g. video, laserdisc, integrated learning systems, print materials (Laubach)
3. Types of media strategies
 - Integrated learning systems
 - at sites
 - remote
 - Wasatch-CCC-Josten representatives for presentations
4. Staff training needs vis- a- vis adult learning strategies, curricula for adults, and hardware and software utilization
5. Laptop computers, portable computers, CD-ROM checkout system uses in variety of different ways and the available software
6. Video
 - Cable and pay TV
 - look at franchise agreements for education

ADMINISTRATION AND STAFF DEVELOPMENT

1. Form an executive committee to represent the two county consortium with 5-7 members. Membership will represent the deliverers (county offices, high schools, JTPA, community college, community based-volunteer organizations).

EVALUATION AND DOCUMENTATION

1. Integrate all providers through the information database.
2. Make evaluation activities a reasonably containable process.
3. Track demand for ABE and who receives the services.
4. Shared information should provide learner tracking across providers and counties.
5. The project process should be documented.
6. Implementation process
 - Providers with diverse reporting requirements meet to determine common data elements.
 - Results are fed back to other interested parties and modifications made as needed.
7. Goal: Effective Coordination of all ABE efforts
 - communicate what the consortium is doing
 - determine where learners are falling through the cracks
 - evaluate how well learners are doing
 - Coordinate and share resources e.g. instructional technologies-linking computers
 - Standardize assessment: evaluation-individual learner plan process regardless of instructional approaches being used.

This outline emphasizes the activities necessary to build a multi-agency, multi-county service delivery system. Consequently, outreach, publicity, capacity building and standardization are the key features.

Technical Support Activities

The roles of the OTAN *OUTREACH* technical support project have been to (1) help fashion this project, (2) obtain the initial \$200,000 funding from the California Department of Education for the project and (3) provide technical support and advisory roles in implementing the project. To this end the following project tasks have been carried out:

1. Host a project planning workshop for consortium members.
2. Draft the initial implementation work plan based on the planning workshop outcomes.
3. Serve as facilitators in identifying project objectives, tasks and operating procedures.
4. Draft the proposal to fund the project operations.
5. Identify priority tasks and propose an initial timetable.
6. Obtain two VISTA volunteers to support the project.
7. Research laptop computer learning strategies and hardware/software.
8. Provide an orientation to alternative laptop computer learning strategies, hardware and software.
9. Recommend a laptop computer approach.
10. Recommend an orientation and training program for interested stakeholders.
11. Provide on-going staff support as needed. The preliminary needs assessment will be completed in January 1991.

Next Steps

In 1992 OUTREACH staff will continue to provide technical support to the project with the following priorities in mind:

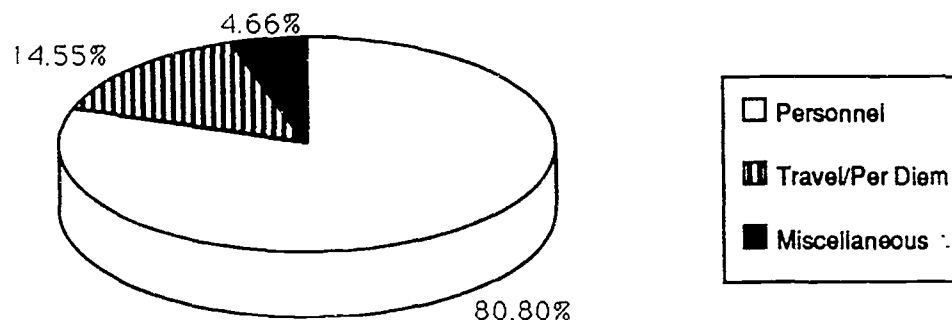
- implement the laptop computer learning experiment
- prototype and implement the provider knowledge and experience base
- link to the OTAN electronic communications system
- on-going training activities
- evaluate the feasibility of using distance learning video media
- add other distance learning components to the project
- expand the project into two additional counties
- assess alternative instructional strategies
- conduct a formative evaluation of the project

Substantial attention will be paid to sharing information on learner's needs, services delivered and support service needs. Building and sharing this knowledge and experience base will be a central technical support theme.

Personnel and Cost Distribution

Subcontract costs for the second year are approximately \$61,220. They have gone almost entirely to support the Tehama-Glenn Adult Learning Consortium. Approximately \$49,461 has gone to personnel costs³, \$8,900 for travel and per diem, \$1,050 for communications, and \$1,798 for photocopy, software, conferences and other miscellaneous costs. The percentage distribution among labor (80.8%), travel and per diem (14.6%), and other costs (4.7%) is represented in the following chart.

Chart 1
SECOND YEAR DISTRIBUTION OF *OUTREACH* COSTS



Six professional subcontract personnel worked on the *OUTREACH* project. Their skills include (1) project planning and design, (2) adult education research, (3) education administration, (4) planning and technical assistance, (5) applied instructional technologies, (6) information system design, (7) staff training and design and (8) evaluation research.

³ This includes applicable overhead costs.

Documents and Deliverable Products

The following are the principal products for the second year of the *OUTREACH* project:

- the Needs Assessment Outline Guide
- the initial project priorities and workplan
- the Tehama–Glenn Adult Learning Consortium funding prospectus
- the Tasks, Timetable and Responsibilities for the OTAN *OUTREACH* Project Implementation: 1991—1992
- Suggested Orientation and Training Priorities
- Specifications for the Prototype Knowledge and Information System
- Memo of Hardware and Software Recommendations for Laptop Learning

Other working papers and documents are available in draft formats.

Conclusion

Creating a multi-agency, multi-county adult learning delivery system where only minimal, fragmented services are available is difficult. There is a history of distrust and competition. Programs and projects are used to going their own ways, fighting for crumbs to maintain operations. Building trust, collaboration and cooperation requires patience and step by step capacity building. The Tehama–Glenn Adult Learning Consortium has started its cross-agency programmatic activities.

There are significant learnings occurring from the consortium approach. However, it takes time to take hold and for cooperation to build. The next two years should provide sufficient time to determine how to expand this model into other counties and whether this consortium approach is plausible in areas with very limited resources and widely distributed learners.

Archiving

Summary of Archiving Activities

OTAN PROJECT, 1991

Objective #1

Establish Long-term Procedures and Policies for Electronic Sharing of AEU Sponsored Products and Information

Determine Scope of Archiving

The scope of the archiving project is instructional, informational, and research information in publications of the California Department of Education, Adult Education and Job Training Unit and its contractors, as well as documents from other government agencies and some journals. The Archiving Project is a three level effort.

The contents of some documents are of such high importance that the entire document should be made retrievable electronically.

Other documents, which should be conveniently available to the field, but due to length and format, borrowing or copying a hard copy would be more convenient than electronic access, are located in the eleven Regional Resource Center Libraries. Bibliographic information and abstracts for the materials located in all eleven libraries are posted on the OTAN Network.

A historical collection of adult education unit documents is being developed in the CDE TELE Information Center (formerly Education Library) for the use of unit staff and others doing research on what has been done before, what worked and didn't work, what information already exists, and how programs have been carried out.

Determine Procedures for Archiving

Procedures were established for processing documents to be retrieved electronically including preparing the abstracts, assigning descriptors, scanning text, reformatting text, and uploading abstracts and documents onto the OTAN Network.⁴

An evaluation of procedures was done, taking into account feedback solicited from the OTAN On-Line Communication System users after a three month pilot period during the first year, and the procedures were revised accordingly.

⁴ See OTAN Evaluation - 4th Quarter (9/1-11/30/90) *Exhibits J-M*

One major improvement was the decision to break files of on-line documents into small "table of contents" sections (rather than 14 k sections) to make them more accessible for reading on line and for key word searching. In the second year, all on-line documents were reworked in the new table-of-contents format.

A detailed procedure manual for processing on-line documents was completed in the second year, including separate sections on Current Documents, Education Library, Course Outlines, Lesson Plans, and Curricular Resources.⁵

Establish Network for Information Sharing

Close coordination with all other funded 353 Projects in California resulted in development of procedures for obtaining their reports and products for the on-line communication system, the resource center libraries, and/or the historical collection, as appropriate.

Relationships with state agencies including the Employment Training Network, the CDE TELE Information Center (formerly Education Library), the State Library, and the California Literacy Campaign were established.

An agreement was made to post on the OTAN Network mini-bibliographies of abstracts of Employment Training Network materials on topics of interest. Six mini-bibliographies were posted. Negotiations are underway to put the entire Employment Training Network library database on line.

Formal "partner" relationships were established with the two ERIC Clearinghouses which focus on adult education materials, the Clearinghouse for Adult, Career, and Vocational Education (ACVE), and the Adjunct Clearinghouse for Adult Education and Literacy (NCLE). Other ERIC clearinghouses were also monitored.

Materials are obtained regularly from the U.S. Department of Education, Division of Adult Education and Literacy, Clearinghouse on Adult Education and Literacy.

The National Clearinghouse for Bilingual Education (George Washington U), the National Center for Research in Vocational Education (UC Berkeley), and the Curriculum Publications Clearinghouse (Western Illinois U) are being monitored.

The Archives Manager attended ACSA, CCAE, and CATESOL state conferences to network with other adult educators.

National and international contacts, which were made through attendance at the annual Adult Literacy and Technology (ALT) and the AAACE Conferences, included the Institute for the Study of Adult Literacy (Pennsylvania State University), the Canada National Adult Literacy Database, and the State University of New York Library Project.

⁵ See OTAN Evaluation - Second Year, (9/1-11/30/91) *Exhibits O*

Establish standards for archiving

The ERIC Thesaurus, which is the field standard, is used as the basis of the descriptors for documents posted on the OTAN Network. The format of the item entries was developed after research into the format of other state and national education data bases.

After the field test period, sufficient data was available to transfer management of the Archiving Project to a customized database system which was developed using FileMaker Pro software. At the end of the second year, the data base contained 421 items including the complete documents posted in the OTAN On-Line Communication System, the shared items in the OTAN Regional Resource Center Libraries, and the Education Library special adult education historical collection. Some items are found in more than one location.

Establish link to OTAN system

A framework for posting the Archiving Project information on the OTAN On-line Communication System was established in the Adult Ed Archives Icon. There are six areas including Adult Ed Handbook, Current Documents, Codes and Regulations, Regional Resource Centers, Education Library, and the Employment Training Network.

Objective #II
Archive Appropriate Information and
Make Available to the Field on the OTAN Network.

Locate AEU Products for
On-line Dissemination and for the Deposit
in the Regional Resource Centers and the Education Library

Some twenty AEU products from the former DNAE Library were located in VOICE before VOICE was closed and the collection shipped to Sonoma State. Some AEU products were located in the AEU Office in Sacramento. Reports of 310 Minigrants had been sent to the State Records Center. Other products were dispersed in various locations in the State.

Retrieve missing AEU products and Evaluate Each for Proper
Disposition Based on Expected Use to AEU Staff and to the Field

A major effort was made in the second year to retrieve the many missing AEU products. Contacts were made with several individuals who have access to copies of missing AEU products and with the former ICDS Project Library at San Diego Community College Teacher Resource Center. At the end of the second year, a nearly complete collection of reports and products from projects of the 1980's had been established. Some headway was made in retrieving products from the 1970's. A collection of adult ed handbooks had been gathered. Continuously funded agencies, such as CASAS, donated copies of their historical reports and products to the effort. Several hundred historical items were retrieved, and about half were processed during the second year. The efforts of the Archiving Project to retrieve California adult ed history had become well known in the field and adult educator leaders promised to review their personal libraries and make donations.

Copies of reports of Exemplary 1984-87 310 Mini-grants were retrieved from the State Records Center. A data base of the grants was developed to be listed on-line and copies of the reports will be made available to the field on a cost-recovery basis. The 1987-88 Mini-grant reports were obtained from CASAS and will also be made available.

Copies of retrieved items were deposited in the Education Library Special Adult Education historical collection and also duplicated for the Resource Center Libraries, if they had current interest.

Process Materials to be On-line in the OTAN Network

One hundred eighty (180) current documents had been processed for on-line dissemination by the end of the second year. Other on-line items processed by the Archives section included selected state and federal Codes and Regulations related to adult education, sample Course Outlines and Lesson Plans, and listings of Curricular Resources. The cost of preparing documents for electronic retrieval varies dramatically from \$3.60 to \$40 per page. The typical document costs \$12/page to process.

Processing time, and therefore expense, is heavily influenced by characteristics of the document such as quality of original, density of print, type style and size, text format (columns, tables), and graphics.

To Make Adult Educators aware of OTAN Archives Information

The Archives manager attends regional, state, and national conferences of adult educators such as CCAE, AAACE, ACSA, and CATESOL. The manager presents information on how to use the Archives in workshops and gives demonstrations at the OTAN booth.

Frequent user alerts are sent on-line to make users aware of newly posted items. New users are sent a welcome message orienting them to the Archives.

Objective #III
Establish Small Circulating Collections
of Selected Documents in the Eleven
OTAN Regional Resource Centers

Provide technical assistance to each
of the eleven OTAN Regional Resource Centers

All eleven Regional Resource Centers were surveyed for their needs for technical assistance. Assistance provided in the first year included sharing a manual on setting up a card catalog management system, advice on shelf organization of materials, and forms for data management.

In the second year, all shared items were cataloged by the central office, and the catalog information was sent with the materials to the Resource Centers in both traditional card catalog main entry format and computer database format.

In the second year, a FileMaker Pro template was developed and made available to the centers for computer cataloging of materials. Five Resource Centers were using the custom templates to manage their own collections by the end of the second year, and three more were planning to do so soon.

A manual was drafted to assist libraries with using File Maker Pro for implementation of the OTAN Regional Resource Center Library Database.

Technical assistance to the libraries was accomplished by telephone or visit by the Archives manager and/or technical support staff to the centers. Additional technical assistance was delivered at the Regional Resource Center Managers meetings.

An integrated library management system which could network the libraries was being investigated.

Develop a policy for circulation of the materials within the Regions

A preliminary policy for circulation of materials within the Regions was agreed to at the end of the first year. Essential features include:

- a. It is the borrowing agency's responsibility to pick up and return the materials.
- b. The borrowing agency's 321 coordinator/manager is responsible for the borrowed item.
- c. The circulation period is restricted to one or two weeks.
- d. Resource Center users are encouraged to call for an appointment at which time their objectives are stated and the Center staff can be sure the needed materials will be available.

Circulation of staff development videos available for purchase was usually restricted to preview.

The circulation policy was evaluated at the end of the second year and found to be functioning well. Libraries have some flexibility in their implementation of the policy.

In the second year, the libraries began to keep circulation statistics to record circulation of materials and the information was included in the quarterly reports. The libraries were in various stages of development in the second year and usage patterns varied.

Deposit documents in the Regional Resource Centers

By the end of the second year, 105 shared items had been deposited in the Regional Resource Centers, most of which integrated the items into existing professional libraries.

Objective #IV
Establish a Small Reference
Collection of Adult Education Unit
publications in the Education Library

The California Department of Education TELE Information Center (formerly Education Library) is a permanent part of the Department and is the appropriate place to deposit a historical collection of Adult Education Unit products and reports for the use of department staff and researchers. The existing computer cataloging system is DATA TREK, which generates disk copies and print reports. The bibliographic information for documents deposited in the adult education historical collection is posted in the OTAN On-Line System. The Education Library has a section in the Adult Ed Archives icon.

During the first two years, one hundred forty-seven documents were deposited in the Education Library, cataloged with DATA TREK, and the bibliographic information was posted on-line in the Education Library section of Adult Education Archives.

Another hundred items have been retrieved from the field and are awaiting processing. Additional items have been promised from the personal libraries of adult education leaders.

Exhibit A

OTAN 800 Number Phone Calls



OTAN PROJECT, 1991

**Summary of 800 Number Calls received
by OTAN Central Office
December, 1989 - November, 1991**

| MONTH | NO. CALLS |
|-----------|-----------|
| DECEMBER | 0 |
| JANUARY | 12 |
| FEBRUARY | 213 |
| MARCH | 288 |
| APRIL | 350 |
| MAY | 485 |
| JUNE | 412 |
| JULY | 340 |
| AUGUST | 320 |
| SEPTEMBER | 888 |
| OCTOBER | 765 |
| NOVEMBER | 695 |
| DECEMBER | 274 |
| JANUARY | 435 |
| FEBRUARY | 685 |
| MARCH | 671 |
| APRIL | 785 |
| MAY | 856 |
| JUNE | 932 |
| JULY | 1009 |
| AUGUST | 1008 |
| SEPTEMBER | 1186 |
| OCTOBER | 1334 |
| NOVEMBER | 1430 |
| TOTAL | 15,373 |

Exhibit B

OTAN Training Sessions

OTAN PROJECT, 1991

OTAN STAFF DEVELOPMENT ACTIVITIES
December 1, 1989 to November 30, 1991

OTAN sponsored, hosted, organized and/or conducted a total of 422 staff development sessions attended by 10,511 participants. This represents approximately 56% of the 321 teaching staff of California.

| | | |
|----|------------------------|-------|
| 98 | Technology | 2,088 |
| 83 | ESL Institute | 1,772 |
| 57 | Literacy | 1,196 |
| 49 | Regional meetings | 1,226 |
| 36 | OTAN Presentations | 962 |
| 28 | Tool Box & Starter Kit | 851 |
| 25 | Assessment Training | 381 |
| 46 | Other Topics | 2,035 |

Sessions on other topics included: Learning Styles, Building Self Esteem, Identifying and Dealing with Learning Disabilities, Teacher Improvement Process (TIP), Instructional Materials Fair, etc.

Over 155 consultants have been contracted to conduct inservice activities. Over 25,000 flyers have been mailed.

Impact on students:

Based on a conservative estimate that 55 students benefit per teacher trained, the number of students impacted by Otan staff development activities would be 578,105.

| | |
|---------|---|
| 422 | sessions |
| 10,511 | participants at 55 students per teacher |
| 578,105 | students impacted |

Exhibit C

OTAN On-Line Subscriber Profile

OTAN PROJECT, 1991

OTAN On-Line Subscribers Profile

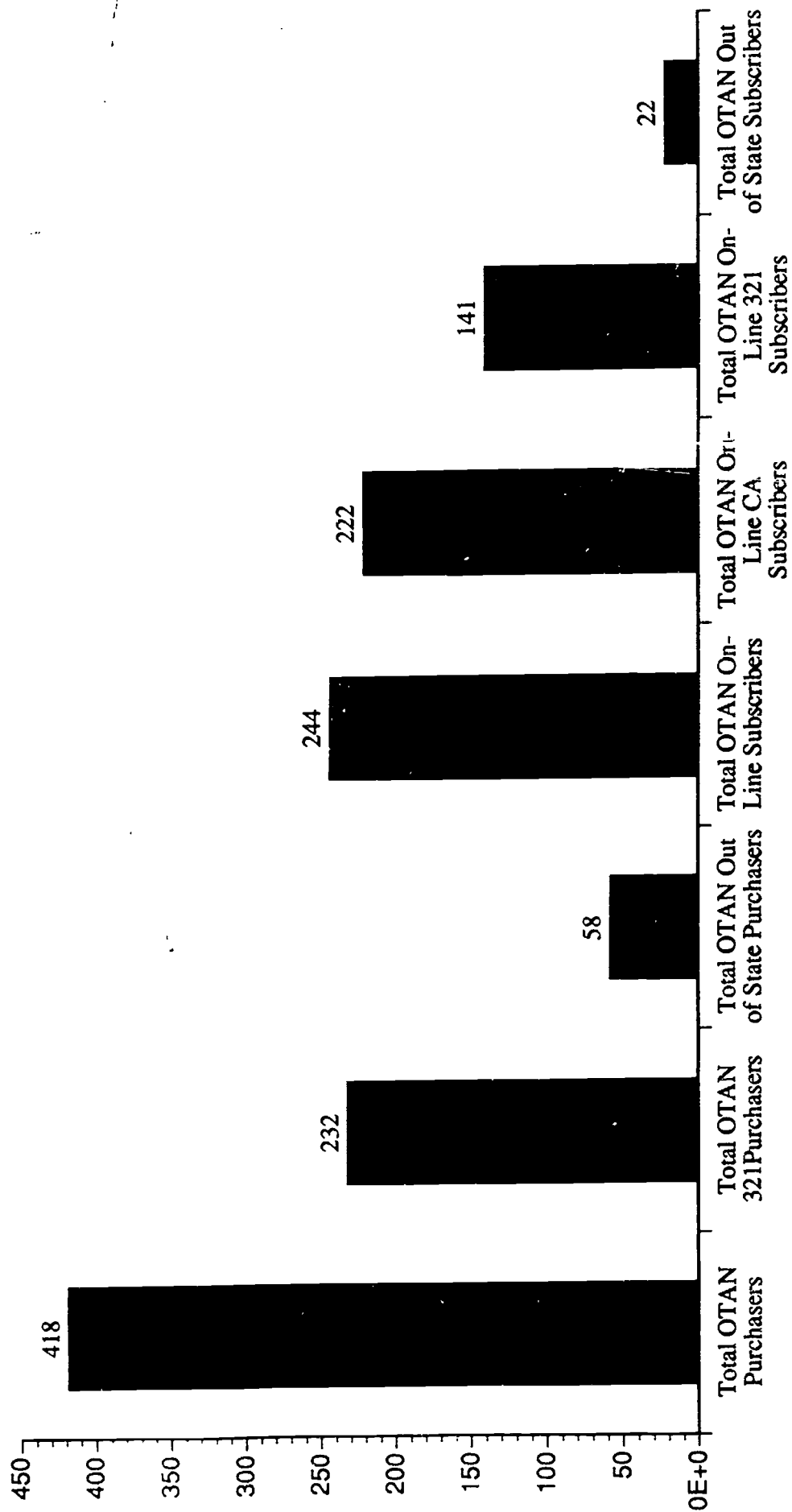


Exhibit D

OTAN On-Line Forum Activity Summary

OTAN PROJECT, 1991

OTAN On-Line Forum Activity Summary

OTAN Forum usage by month:

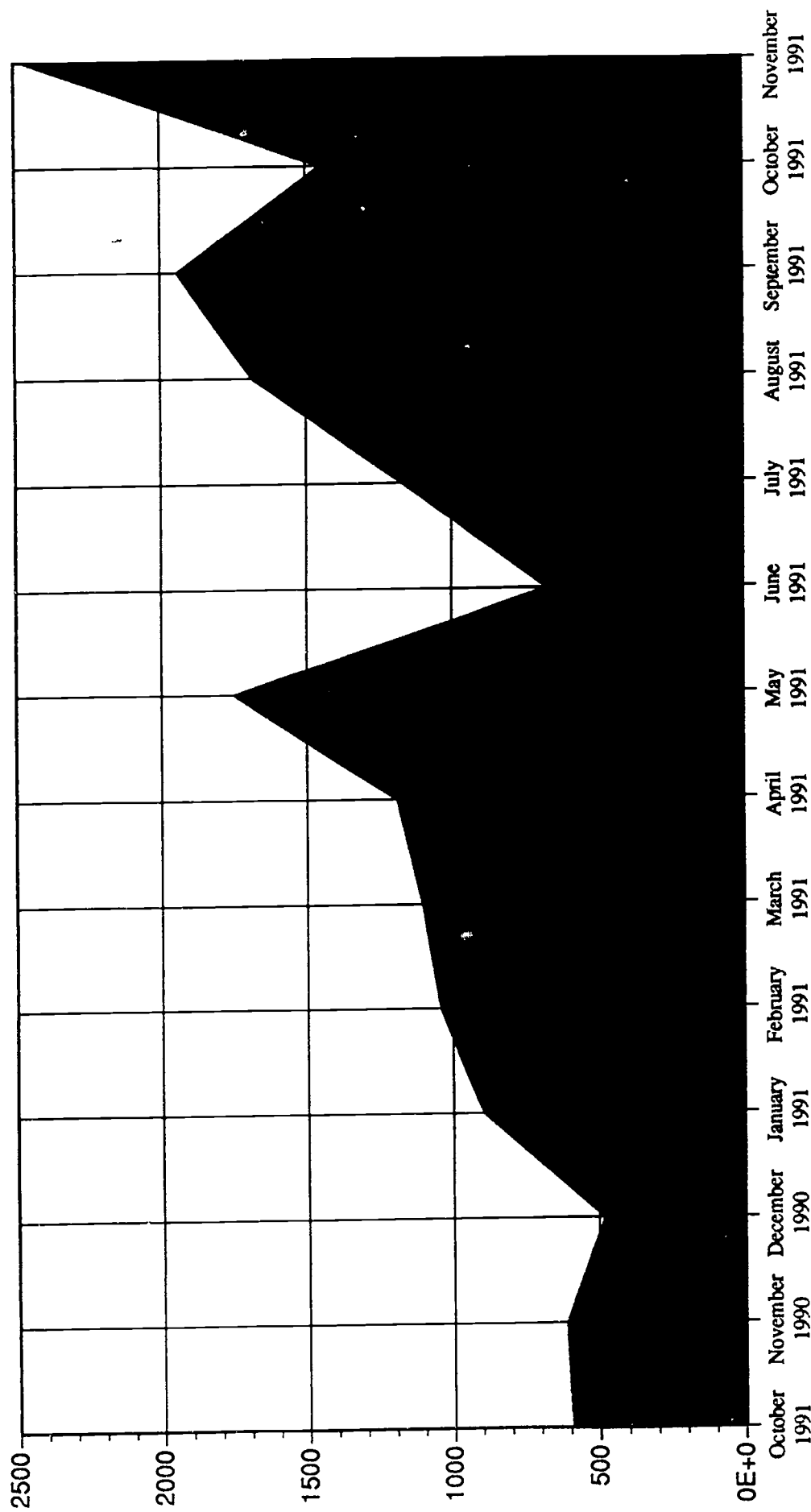
| | Num of Uses Oct 90 | Num of Uses Nov 90 | Num of Uses Dec 90 | Num of Uses Jan 91 | Num of Uses Feb 91 | Num of Uses Mar 91 | Num of Uses Apr 91 | Num of Uses May 91 | Num of Uses Jun 91 | Num of Uses Jul 91 | Num of Uses Aug 91 | Num of Uses Sep 91 | Num of Uses Oct 91 | Num of Uses Nov 91 |
|-------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| About the OTAN Forum | 26 | 39 | 27 | | | | | | | | 38 | 31 | 17 | 50 |
| Round Table | 10 | 5 | 14 | 37 | 12 | 49 | 54 | 52 | 23 | 58 | 36 | 32 | 36 | 46 |
| OTAN Resource Centers | 3 | 10 | 6 | 11 | 17 | 39 | 56 | 39 | 12 | 24 | 18 | 26 | 25 | 28 |
| Want Ads | 8 | 9 | 11 | 13 | 12 | 18 | 17 | 19 | 6 | 5 | 23 | 18 | 25 | 20 |
| Demo Software | 7 | 10 | 6 | 8 | 13 | 13 | 10 | 18 | 11 | 16 | 14 | 5 | 5 | 15 |
| Current Articles | 24 | 42 | 15 | 28 | 11 | 44 | 26 | 33 | 23 | 29 | 11 | 21 | 8 | 55 |
| Legislative Information | 47 | 47 | 38 | 75 | 87 | 186 | 155 | 294 | 82 | 82 | 166 | 121 | 85 | 118 |
| Curricula Resources | 9 | 25 | 14 | 10 | 10 | 28 | 18 | 25 | 21 | 21 | 40 | 28 | 27 | 27 |
| Lesson Plans | 2 | 9 | 4 | 16 | 23 | 48 | 31 | 33 | 5 | 5 | 16 | 16 | 11 | 29 |
| Educational Grants | 26 | 26 | 72 | 76 | 162 | 62 | 35 | 57 | 10 | 10 | 63 | 73 | 34 | 34 |
| Course Outlines | 13 | 31 | 34 | 48 | 75 | 29 | 50 | 137 | 49 | 108 | 56 | 108 | 62 | 77 |
| Upload Area | 0 | 0 | 16 | 109 | 227 | 0 | 265 | 142 | 142 | 87 | 424 | 186 | 134 | 126 |
| Public Domain Software | 91 | 62 | 39 | 100 | 35 | 113 | 103 | 184 | 72 | 111 | 139 | 170 | 101 | 125 |
| CDE Info | 27 | 17 | 10 | 23 | 26 | 33 | 23 | 47 | 26 | 47 | 45 | 61 | 11 | 93 |
| Who's Who | 13 | 8 | 21 | 27 | 13 | 53 | 37 | 53 | 30 | 42 | 61 | 86 | 70 | 70 |
| Master Calendar | 94 | 115 | 96 | 89 | 107 | 99 | 132 | 189 | 72 | 151 | 134 | 229 | 207 | 137 |
| Adult Ed Archives | 192 | 156 | 54 | 221 | 211 | 289 | 178 | 430 | 83 | 372 | 401 | 732 | 590 | 1421 |
| Monthly Total Uses | 592 | 611 | 477 | 891 | 1041 | 1103 | 1190 | 1752 | 667 | 1168 | 1685 | 1943 | 1448 | 2471 |

Total by forum area 10/1/90 - 11/30/91

| | Lifetime Forum Use by area |
|-------------------------|----------------------------------|
| About the OTAN Forum | 228 |
| Round Table | 464 |
| OTAN Resource Centers | 314 |
| Want Ads | 204 |
| Demo Software | 151 |
| Current Articles | 370 |
| Legislative Information | 1,583 |
| Curricula Resources | 303 |
| Lesson Plans | 248 |
| Educational Grants | 740 |
| Course Outlines | 877 |
| Upload Area * | 1,858 |
| Public Domain Software | 1,445 |
| CDE Info | 489 |
| Who's Who | 584 |
| Master Calendar | 1,851 |
| Adult Ed Archives | 5,330 |
| Grand Total | 17,039 |

* The Upload Area represents usage from the full range of forum areas since it is used in part as a temporary storage area for outdated documents. Monitoring the Upload Area assures complete reporting of forum use.

OTAN On-Line Forum Activity Summary



Number of Documents Opened per month

Exhibit E

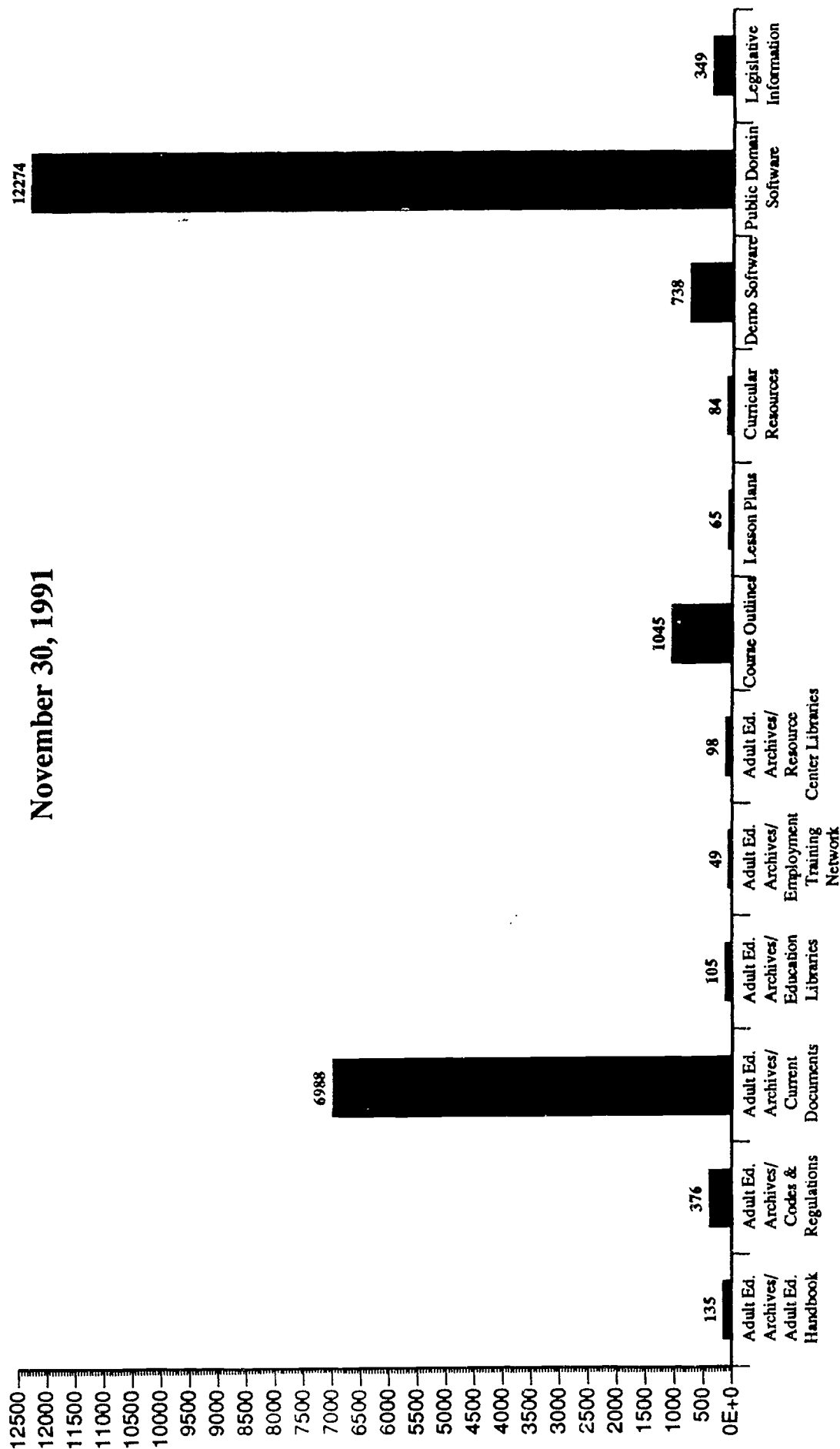
OTAN On-Line Forum Size By Selected Components

OTAN PROJECT, 1991

Outreach and Technical Assistance Network

OTAN On-Line Forum Size by Selected Components

November 30, 1991



Values Represented in Kilobytes (K)

Exhibit F

Resource Center Library Usage

OTAN PROJECT, 1991

Resource Center Library Usage Annual Aggregate Dec. 1, 1990 - Nov. 30, 1991

