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ABSTRACT
                The techniques of instructional design that have been
applied to the preparation of distance materials for independent
learning are now being applied to the production of materials that
are to be used in flexible delivery of subjects. This allows subjects
to be offered which require face to face work but can also have a
major component of independent study. Flexible delivery is about
delivering education to students who for some reason cannot presently
access a subject. That is the reason why distance educators have
traditionally provided the flexibility of distance learning. Flexible
learning is essentially a delivery issue. This paper provides a case
study of the development of a book called, "Working with Grief and
Loss," by the Open Training Education Network (OTEN) (Australia),
with emphasis on the role of the eight stakeholders in the final
outcome of the project. Instructional design issues include the
development of project specifications, and identification of
stakeholders and learners. Flexible delivery in practice is much more
about delivering education to students who for some reason cannot
presently access a subject, hence the reason why distance educators
have traditionally provided the flexibility of distance learning.
Flexible learning is essentially a delivery issue. The stakeholders
in the project, those who influence the content and delivery of the
learning programs, both internal to the educational process (students
and teachers) and external (government), had more input than the
learners on how the materials were produced and delivered. However,
the opportunity to directly compare instructional design for distance
education with instructional design for flexible delivery is clouded
by the complexity of the relations with all the stakeholders.
Negotiation between multiple stakeholders will likely be a key
feature of flexible delivery. (Author/SWC)

# The Instructional Design Transition from Distance to Flexible Delivery Materials

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OTEN

*The techniques of instructional design that have been applied to the preparation of distance materials for independent learning are now being applied to the production of materials that are to be used in flexible delivery of subjects. This allows subjects to be offered which require face to face work but can also have a major component of independent study. This paper will be a case study of the development of a book called* Working with Grief and Loss *by OTEN (The Open Training Education Network). Instructional design issues to be considered include the development of project specifications, identifying stakeholders and learners.*

Flexible delivery is a major growth area in the VET sector with TAFE and private providers being encouraged to 'flexibly deliver' their courses. The term appears in key documents and as part of reviews of the existing functions of present organisations. Yet, the use of the term flexible to apply to many kinds of activities (some of which are decidedly inflexible) is somewhat enigmatic. Flexible delivery has been used synonymously with independent learning, open learning, mixed mode, distance education, face to face teaching with some independent learning and even just altering the timetable and duration of classes. Those definitions that do exist do not accord completely with the practice. For instance the National Flexible Delivery Working Party has defined flexible delivery as:

> an approach to vocational education and training which allows for the adoption of a range of learning strategies in a variety of learning environments to cater for differences in learning styles, learning interests and needs and variations in learning opportunities (1992:5)

This suggests a range of options for the same group of students when flexible delivery in practice is much more about delivering to students who for some reason cannot presently access a subject. This is why it has been seen to be the preserve of distance educators who have traditionally provided the flexibility of distance learning. A key feature is that distance education is suitable for students who could not, or did not want to, attend a TAFE college

Despite all the rhetoric about learner centredness, flexible learning is essentially a delivery issue.

'What is critical here is the degree of control various stakeholders are able to exert on the content and delivery of learning programs and of those, which stakeholders might be described as internal to the educational process (ie teachers and students) and which external (government) '(King 1995:3)

This notion of stakeholders is crucial to the following discussion of a specific project. It was stakeholders other than the learners that had the most say on how the materials were to ultimately produced and delivered.

## Overview of the project

This case study relates to materials that were to be produced to support the 'flexible delivery' of a TAFE subject called 'Grief and Loss and Working with the dying'

The learning resource that was produced was a result of compromise between the interests of the various stakeholders. It was a book which can be used for independent study by students. It also provides a teachers guide to conducting a workshop that students would attend for some of the course. Its flexibility is that it allows students who would otherwise have had to attend TAFE to undertake a mixture of independent study and teacher led work. The book is being sold through bookshops and

has a secondary audience of people interested in the topic who might want to work through independent materials for their own benefit.

## Needs analysis

### STAKEHOLDER ONE: David Wallace, Personal and Community Services ITD

David Wallace, the Industry specialist, Welfare, in the Personal and Community Services training division of TAFE identified that there was a need for flexible learning opportunities for students undertaking subjects in the Working with Older People Certificate.

He identified the needs as

1. Students in outlying areas, working in Aged Care, whose local colleges did not offer the relevant subjects for whom a mixture of independent study and workshops at a local college would allow them to do the Certificate.
2. Teachers in outlying colleges who would like to offer the subjects but didn't have sufficient students to be allowed to form a class. They could run some workshops and let the students do independent study for the remainder of the course.
3. Students working in Aged Care whose workload prevented them attending the subjects on a regular basis but for whom the flexible delivery could be suitable.

### STAKEHOLDER TWO: Learners undertaking the subject

### STAKEHOLDER THREE: TAFE teachers in colleges

### STAKEHOLDER FOUR: The Education and Training Foundation

An application for funding to the (now defunct) NSW Education and Training Foundation (ETF) was successful. David Wallace selected the Open Training and Education Network (OTEN) to be the organisation that would use the funding to produce materials to meet the needs of the learners.

David Wallace selected OTEN because of its role as both a producer of distance and flexible learning materials and its involvement in the delivery of TAFE subjects. It is useful here to explain that role in a bit more detail.

#### The role of OTEN

OTEN is the major provider of distance education for the TAFE sector in NSW. It includes a core of teachers, and a group of expert production professionals who produce learning resources. The NSW Minister for Education described the features of OTEN earlier this year as

- Direct course provision for 27, 000 TAFE students and nearly 4, 000 school students
- Support for flexible delivery programs within NSW TAFE Institutes.
- Development and maintenance of a range of print based learning resources covering more than 600 TAFE subjects
- Provision of more than 300 hours of live satellite broadcasts for schools, TAFE and Industry.
- Development and publishing of Interactive services for the Education Network of Australia(EdNA)
- Management of state-wide technology based services for TAFE including its State wide library system and satellite network.

### STAKEHOLDER FIVE: The ETRC (OTEN)

David Wallace approached the section of OTEN that produces the learning materials to support distance education students. It is called the Education and Training Resource Centre (ETRC). The project manager was appointed from this section of OTEN.

He clarified needs and then approached the section of OTEN that actually 'delivers' courses to students. It is called the Open Learning Program. (OLP)

## STAKEHOLDER SIX: The OLP (OTEN)

One possibility was that OTEN would simply offer the subject 'Concept of loss and working with the dying' as one of its distance education subjects. The learning materials would be produced by OTEN and automatically distributed to students who were enrolled in the subject. The students would be 'OTEN students 'a with all the support and resources that provides.

The OLP rejected this proposal for two reasons:
- There was not sufficient teacher expertise at OTEN to support this particular subject.
- There were no plans for expansion into that area in the near future by recruiting specialist staff.

The result of this was that the materials would still be produced by the ETRC. The question then arose as to how they would be distributed. The Marketing section of OTEN is responsible for the distribution of materials that fall outside the gambit of the OLP. So they were approached.

## STAKEHOLDER SEVEN: The marketing unit (OTEN)

There are two levels of distribution by the marketing unit. The first are open learning materials that were developed for distance education courses conducted by the OLP but which have an interest to other people. These are sold at print cost only to anyone who pays their money and orders via a catalogue.

The second kind are books and other materials which have some commercial potential and which are distributed through bookshops and aim to make a profit. The Senior Publications Officer of Marketing decided that the 'Concept of loss and working with the dying ' materials were of the second type and could be a profitable venture.

The question of how students would do this subject was yet to be resolved. After some negotiation it was decided that students would be enrolled in their local TAFE and then the students or the TAFE would purchase the books. Teachers would be employed to conduct a workshop component and to supervise assessment.

## STAKEHOLDER EIGHT: Local TAFE colleges

It is obvious from this description that the final outcome of this project would be a compromise between the needs and requirements of at least eight stakeholders often with conflicting agendas. The input of these various stakeholders is dynamic and by no means sequential so that the project changed direction in key ways throughout its life rather than proceeding unchanged from the brief to the final product.

The notion of flexible delivery was itself being renegotiated according to the various compromises that were arrived at during the project.

All this detail is necessary to place in context the instructional design issues that apply to this project specifically and to the general question of distance education versus flexible learning approaches.

## Instructional design

The term instructional design is itself replete with meanings and associations. Some of the issues posed at a forum on instructional design at Southern Cross University, in 1994 included the questions: Are instructional designers integral to the large picture of program development or do their activities represent one discrete step in an industrialised production line? Are they project managers or course team participants? Do they practice flexibility and creativity or are they wedded to systems that guide practice within set parameters?(Morgan, di Corpo and O'Reilly, 1994: 172) Perhaps the most obvious common ground found at the forum was the instructional devices and strategies that instructional designers incorporate into materials. These include objectives, icons, access devices, concept maps, headings, margin notes, graphs and tables, advance organisers, activities, feedback, summaries. (Morgan et al 1994:173)

There is evidence that the instructional designer's work varies considerably between different organisations (Weekes, 1994:189) This is also evidenced by the different gradings and classifications that are used in the appointment of instructional designers.

## Instructional Design at OTEN

The majority of the instructional designers that are employed by OTEN work on the production of print based materials by ETRC. They are graded as either Education Officer or Senior Education Officer. Most of them also fulfil the role of project manager but they do not fulfil both roles on every project and there are some education officers who specialise in project management. Their role does vary considerably from project to project. (Ramsay, 1995) There are some common guidelines and even instructional design checklists (job aids) that help to define the parameters of their work. (ETRC Guidelines, 1994) These guidelines divide a project into three phases, Planning, Development and Production. ETRC places an emphasis on effective planning and even pays writers a separate fee for this phase. A comprehensive instructional plan has to be worked out and presented.

ETRC also emphasises a team approach with a typical team including Project manager, instructional designer, writer, OLP teacher, reviewer, editor, graphic designer, desktop publisher, and word processor operator. This team is a mixture of outside people on project specific contracts and in-house people working on a number of projects.

The role of instructional designer includes roles such as training and briefing writers, transforming raw material from writers (who are content experts) into learner friendly text, ghost writing, providing a range and variety of learning activities, and project management.

Most instructional designers work on screen and the text once finalised is then edited on screen and Desktop Published. The combination of the role of project manager and instructional designer accords a degree of control and responsibility that is greater than any other member of the team. The development of most distance education material is further aided by the application of a template called Style 3 which uses standardised icons, headings, graphs and tables, activities headings, to speed up the development work.

For the project 'Grief and Loss and working with the Dying' the roles of project manager/ instructional designer were combined. Some of the specific consequences of the project becoming *flexible delivery* mode rather than a traditional OTEN distance education package were:

*   revision of the instructional plan to meet the changing parameters of the project because of the impact of the eight stakeholders
*   direct negotiation with local TAFE colleges about issues of delivery. Who was going to pay for the materials (students or the colleges). Who was going to set the assessments? How were the workshops organised? How were staff involved to receive compensation for having independent students to look after in terms of advice and help.
*   negotiation with the OTEN marketing unit concerning the production of an affordable book.
*   deletion of most of the references to TAFE and the actual name of the course and the change of the books title to 'Working with grief and loss'.
*   Multiple transformation of the text to accommodate changing design requirements of the OTEN marketing unit.
*   Negotiating more expensive copyright clearances because the book was to be sold commercially.
*   Involvement of the client (David Wallace) in progressive negotiations about the shape of the project, that is planning after the planning phase would normally have been over.

## Conclusion

The opportunity to directly compare instructional design for distance education with instructional design for flexible delivery has been clouded by the complexity of the relations with all the stakeholders. Indeed, this I suspect is one of the key features of flexible delivery that it will inevitably involve reaching agreements between more people. In an ideal world it would be wonderful for the learners if they could have the flexibility to chose between the commercial book, a distance education course run by OTEN and face to face delivery. This is certainly possible in some courses where existing materials are being customised to meet diverse needs. OTEN in fact has a special unit within OLP which is providing advice to TAFE colleges on how this can be done for existing OTEN subjects.

The experience in this project is shared by others working in the area of flexible delivery. As Allen(1994: 162) writes

> The road to flexible delivery does not go in a straight line. There are many bends, hills and pot holes in this road. There is also an increasing amount of traffic, some of which is travelling slowly and not all of it is going in the same direction.

I am confident because of the strength of the writers work and the inherent interest and value of this topic that the commercially available book will be used both by TAFE students and the general public to understand and work through grief and loss. It provides, though, only one form of flexible delivery.

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