



CHAPTER 13

CONNECTING THE DOTS: PLANNING AND MANAGEMENT STRATEGIES IN TVET

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A GROWING INITIATIVE: OPEN LEARNING IN TVET

Creating a new initiative in open learning is an exciting prospect. Traditional technical and vocational institutions are joining a large number of institutions around the world that have recognised that open learning is efficient, effective and provides greater access to quality programmes for more students. The leadership and faculty of traditional institutions want to make a difference. They want to provide greater access to their training programmes. They want to use their scarce fiscal and human resources in the most effective way possible. Open and distance learning can increase their ability to meet that goal.

Traditional approaches to the delivery of technical and vocational programmes will continue to be important, and in many instances will be the only way in which certain skills can be imparted; however, increasingly we see a mix of open learning and face-to-face instruction. Open learning can teach theory and prepare students to understand the nature of the practical skills they need to acquire. Traditional face-to-face instruction can build on the open learning and provide the hands-on training of practical skills. Adding open and distance learning (ODL) programmes, or including open and distance elements into existing programmes, allows institutions to better realise their mandates. ODL has a long history and around the world practitioners have come to recognise that the application of ODL systems is an effective way to address both basic and continuing training.

There is no doubt that demand for training will increase as the complexity and sophistication of the workplace grows. To ensure the skills required of modern economies are available, it is generally recognised that continuous development of the workforce is necessary and must be identified as a basic part of education and training policy. Governments recognise that traditional approaches to the delivery of all education and training needs must be reviewed and that new, more efficient approaches need to be introduced to allow the provision of training within the capability of government to fund it.

Apprentice training in Canada: the focus of open learning

The application of open learning to apprenticeship training is a “win/win” response for all stakeholders:

- Open learning expands available formal training time for apprentices from 4 to 10 weeks per year of apprenticeship to virtually 12 months per year. This makes for improved training efficiency on the part of educators and benefits the employers' productivity.
- Well-designed, modular, competency-based open learning focuses on the achievement of skill proficiency, regardless of the time it takes to learn it. Further, by its “openness,” there is greater visibility of the competency standards required, greater consistency in the training received and greater opportunity for identification of competencies common to more than one trade.
- Instructional technologies have the capability of linking apprentices studying the same trade in diverse locations across the province and providing a consistent instructional message over a short period of time.
- Instructional technologies used in open learning approaches improve accessibility to apprenticeship training in four ways:
 - Geographic access: Provision of training in, or close to, the

apprentice's own community

- Equitable access: Increased opportunities for equity groups to participate in apprenticeship training
 - Resource access: Access to world-class expertise and resources which can be “beamed in” to remote locations
 - Community presence: Increased visibility of training in the community and consequently greater promotion of the value of occupations in the trades
- If well-designed, triple usage of open learning materials is possible for apprenticeship training, high school pre-apprenticeship training, journeyperson upgrading.
 - If done right, open learning can complement on-the-job practice of trade skills and integrate the “theory” of the trade with practical skills on a day-by-day basis. Training is immediately applied and “relevant” in that it is practised on the very equipment used at the work site.

The flexibility of open learning approaches to apprenticeship training implies portability of the training and opportunities to ladder upward into other post-secondary educational credentials as well as downward into secondary high school diplomas.

Excerpted from a document prepared by Open College (British Columbia, Canada), 1994.

Historically, public institutions were slow to adopt ODL methods, but today there are only a few institutions that are unaware of the potential of open learning. For much of the 20th century, in locations as separate as Canada and New Zealand, there existed a successful record of ODL for technical and vocational education and training (TVET). The private sector has been a strong advocate of open learning for its training programmes, and public institutions have a long and successful record of ODL too.

SUCCESS STORIES

It is easy to dismiss the notion that ODL can be applied to TVET programmes with their focus on hands-on skills. It must be recognised that there are many examples of programmes in the manual skills trades that have been delivered through open learning. Obviously the hands-on training, as has been pointed out elsewhere in this book, must be accommodated in innovative ways. Often the hands-on training is provided through methods such as partnerships with industry and the use of facilities in institutions when students in traditional programmes are not using them.

Of course programmes that do not require major practical components lend themselves more readily to delivery through ODL. The Open Polytechnic's BIZ scheme provision has proved extremely popular, mainly because the distance mode allows people to fit their study around the demanding pressures of running or planning their own small business enterprise.

Supporting training in small business

National open and distance learning institution The Open Polytechnic of New Zealand is supporting basic skills training for current and prospective owners and managers of small- and medium-sized business enterprises (SMEs) through a special government-funded scheme called BIZ. The scheme offers free training on a national basis through a range of providers, with The Open Polytechnic offering flexible distance options for people who cannot or do not wish to access contact provision.

SMEs are a key area for workforce upskilling in New Zealand's drive to meet the demands of the emerging knowledge economy. It is estimated that around 85% of all New Zealand enterprises fall into the SME category (employing the equivalent

of five or fewer staff). These include a large number of the country's export businesses.

Since the BIZ scheme's inception in mid-1999, nearly 3000 people have studied through The Open Polytechnic under a range of course options. As part of the initial course development, The Open Polytechnic conducted research on the needs of small businesses, which indicated many owners and managers needed new skills as their business grew and planning became an increasingly important factor.

The core material focuses on business and financial planning and moves through three main areas: day-to-day business management; planning and monitoring; and making a business grow.

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Currently four courses are offered targeted at specific areas of SME activity:

- Planning to start a small business
- Planning to start an export venture
- Running an existing SME
- Women in small business

The purpose of the courses is to provide hands-on practical assistance and guidance for people in small business ventures, rather than formal certification.

Consequently, the learning materials are designed as a flexible resource package, enabling learners to pick and choose those elements that meet their specific business needs. Rather than providing all of the information that might be needed, the packages identify key topics and information requirements, then guide learners to more detailed information sources.

Checklists help learners clarify their information resources and gaps and relate information to their own

enterprise. Profiles of successful New Zealand small businesses are included to support motivation and provide a wider context for thinking about such ventures.

Rather than a formal assessment, learners are able to develop and submit their own business or export plan for comment by expert lecturers in the small business field. Guidelines for writing plans and real-world examples of successful plans are also included in the resource materials.

Each course consists of 12 to 15 modules and takes a total of 100 hours to complete, usually over a period of three to four months (but with a 12-month enrolment period). Reviews of course content are ongoing and changes are made accordingly, including the introduction of new material to keep abreast of new technology and business trends. The courses are suitable for a wide variety of people, including those who handle the accounts of a partner's business but do not see themselves as managers.

PLANNING FOR AN ODL PROGRAMME

In recent years the advent and convergence of sophisticated computer and communications technologies has spurred the growth of ODL. Technology now allows for significant economies in the development of ODL programmes, and where the networks are available, it adds to the toolbox of the instructional designer. However, sophisticated technology is not essential to the development of an ODL programme, and if it isn't available that shouldn't detract from considering ways to implement programmes to address unmet needs.

Earlier chapters have outlined some specific elements of ODL systems. However, for the practitioner about to embark on developing an institution's first open learning programme, it is important to recognise that these primary and basic elements are the same as for traditional, face-to-face programmes: don't be intimidated by the depth of knowledge about ODL. In many ways it is simply a different way of looking at what traditional institutions already do:

- *Know your stakeholders and what is required to satisfy their needs.* The personal support provided by key individuals who will approve programmes, provide budgets or accept graduates. As early as possible it is critical to develop a basis of trust and understanding about what will be done by whom and with whom. Make key stakeholders part of the process; develop in them an interest in a successful outcome.
- *Identify the training need.* There are many ways in which this can be accomplished. (Chapter 5 is devoted to the topic of needs analysis.) Here, too, it must be remembered that your basic knowledge of your community's training needs must be appreciated. "Go with what you know."
- *Know your learners and their abilities.* Once needs are identified, develop a profile of the learners. What is the level of literacy? Are they likely to be self-starters and motivated to complete an independent learning programme? Will they need some assistance in understanding what is expected of them? Can they afford the costs? How will they learn about the programme?
- *Define the curriculum.* The initial programme will be a pilot to assess how an institution might deliver programmes using ODL. A generic topic for which there is likely ample choice of existing distance learning materials would be a sensible initial effort. This initial programme should be one or two courses that address a well-defined need, has support from internal and external stakeholders, and does not require elaborate additional resources for aspects such as hands-on training or an industry placement. Simplicity must be the underlying factor.
- *Ensure student and administrative support systems.* This is an easy area to overlook. Basic systems such as registration and fee collection, examination and student records need to be determined, and the way in which these items will be handled must be carefully considered. The priority must be on utilising the existing institution's systems. Don't waste resources creating parallel special systems.
- *Design a delivery system.* The delivery system must reflect the resources of both the institution and the learner. (There is little point in implementing a state-of-the-art Web-based system if the client group has little or no access to the Internet!) Generally speaking, an initial foray into ODL is best served through a simple delivery system that minimises the possibility of technical failures. This tends to local centres for contact with tutors, pick up and delivery of assignments and instructional materials, mail and telephone communication. More sophistication will be easier to add as initial successes become a base upon which to build additional ODL programmes.
- *Use appropriate instructional design.* Use models that will not intimidate the learner and are suitable to the content. Language levels and cultural context are important if, as is recommended, you use existing content from another jurisdiction. Any adaptation should ensure that the level and style of language is suitable and that the examples and the context of any illustrative content fits with the local environment.
- *Articulate for credentials.* Of critical importance is the equivalency of the ODL course to existing face-to-face courses that teach the same content. Through the provision of identical credentials, an institution is stating that the ODL programme is not inferior or second rate in comparison with more traditional instruction. It is important that your first ODL programme includes this aspect of comparison.
- *Secure and train qualified staff.* Staff with an interest in ODL and who have the necessary academic qualifications should be retained to provide the instructional

support. The nature of ODL requires the faculty member to act as a tutor, supporting and assisting the student and grading assignments and projects. The tutor in ODL programmes is not the instructor in the sense that knowledge is imparted. The ODL materials do that. This is an important difference that many instructors new to ODL have difficulty understanding. A carefully designed training programme is required to assist experienced faculty to understand the role of tutor.

IMPLEMENTING AN OPEN LEARNING PROGRAMME

The practitioner new to ODL and wanting to implement an open learning programme should keep in mind the issues that have to be addressed are no different from those that need to be addressed in traditional face-to-face institutions. Experienced TVET administrators can easily implement open learning programmes. The skills and experience gained from traditional methods are quite transferable.

Those educational leaders who are interested in introducing ODL into a traditional institution should not be afraid to try something. Easier said than done? Perhaps, but others have done it. It may not be easy, but, with careful thought and by drawing upon the experience and commonsense of technical and vocational administrators, it is possible to introduce open learning into a traditional institution quickly and effectively.

Start small

Select as the first open learning course to be offered a topic that is small, contained and complete — a course for which you know there is a large unmet demand and one which will attract a significant number of qualified applicants. In selecting this first course there is no need for an extensive needs analysis. Most TVET administrators are acutely aware of the training needs in the region in which they operate. Pick a sensible option to help get internal support as well as support from external stakeholders (which may be required or “wise” to obtain).

Keep it simple

Your initial course should be one which does not require elaborate hands-on training or placement in industry. More sophisticated courses with practical components can be added as your initial entry into open learning proves to be a useful approach to meeting needs. It is important that your first course be seen to be successful by more conservative colleagues who probably believe that open learning, while appropriate for academic subjects, has no place in TVET programmes. An important objective is to clearly demonstrate that, although not a replacement for traditional methods, open learning can significantly enhance access to TVET programmes and allow better use of the scarce resources represented by the traditional facility.

Select a team

One person alone cannot create the momentum required to initiate an open learning programme. A tried and true approach is to select a small team of three or four people, without fanfare, to develop the idea and plan for the introduction of the first open learning course. This task force is often called a “skunk works” and it operates outside the normal structure of the institution, with a clearly defined mandate (see following). It will spend some time understanding what open learning is and is not, and then will

proceed to develop a plan to implement a programme. Selection of the team is critical. Three people may be all that is required: perhaps a senior administrator to ensure institutional support, an instructor to ensure content and method appropriate to the subject and the registrar to ensure the student administrative systems are not a problem at implementation time.

The team must know what is expected of it. The mandate might be to develop a pilot project to determine the efficacy of open learning systems in assisting the institution to meet its mandate. Specifically it might include:

- Selecting a course to be delivered using ODL.
- Selecting suitable content that is available in an open learning format from another institution. (If original development is determined to be the best route, then additional instructional design and content resources that will be required must be determined.)
- Determining the degree of adaptation that will be required to deliver acquired content in the local context.
- Determining the structure of the delivery system and the student support services that will be available.
- Determining how the support services might be implemented within current structure and practice.
- Determining the extent and nature of any training that might be required for the staff who will be involved in the initial delivery of an open learning programme.
- Managing the delivery of the initial pilot ODL programme and establishing a neutral evaluation process.
- Designing a feedback mechanism for the first offering to ensure constant monitoring of the systems and their adequacy and efficacy.
- Developing an implementation plan to address issues such as time lines, staffing requirements, student recruitment and articulation issues.
- Developing a budget for the course development or adaptation and the initial offering.
- Defining the critical success factors, around which to build evaluation plans.
- Developing plans for both formative and summative evaluations.

The team must be given the resources and support to do the job. They need to know what that level of commitment is before they begin to work on the project. Most importantly, a senior administrator must indicate support and act as the champion for the project to give it the prominence required. This administrator will also reinforce for the team the importance of its task in assisting the institution to develop new ways to better meet its mandate.

Recruit students

Once a plan is in place with necessary approvals and a budget, it is time to offer the open learning programme. Student recruitment is critical to the success of the programme. If the programme to be offered has been carefully selected, there should be a pool of potential applicants to ensure it is oversubscribed. Selection of this cohort is very important. Where possible, steps should be taken to admit students with a good chance of success. It will be very important that the programme be seen as a success,

both in terms of the completion rate and the comments of the participants. Success at this stage will allow an open learning programme to grow. If your initial foray is not seen to be successful, it may be difficult to try to introduce open learning systems in the future.

Deliver and evaluate the program

With students recruited and the resources in place, the final step is to deliver the program to your client group. For this initial offering, a feedback loop from the students into the administrator responsible will be important to allow for any modifications to the delivery services that may be required.

Implement your evaluation process to allow adjustments as the programme operates. Determine what changes would be appropriate in subsequent open learning programmes. An effective evaluation will also be of great value in promoting the efficacy of open learning programmes to stakeholders.