

# ***THE HITCHHIKER'S GUIDE TO***

## ***flexible learning***

for Deliverers of Training to SMEs



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[www.learndirect.co.uk](http://www.learndirect.co.uk)



**PRICEWATERHOUSECOOPERS**

# *Ufl - Responding to the global marketplace*

As a nation, the UK faces major challenges in ensuring that industry is able to continue to compete with the best in the world. The University for Industry (Ufl) aims to address a number of these challenges.

## *Ufl's role*

Under the brand name Learndirect, Ufl is introducing a new approach to training. Using the best of on-line delivery, they will provide a growing range of highly targeted training products. Ufl will be particularly important for small and medium sized enterprises (SMEs) that face particular problems in ensuring that their employees have access to the skills and knowledge they need. Difficulties involved in accessing appropriate training can mean that there is little or no effective skills or management development in SMEs, thus making it difficult to improve performance and meet business objectives.

Ufl's mission is to promote employability for individuals and competitiveness for companies. Strategic objectives are to stimulate the demand for lifelong learning by businesses and individuals and to broker the provision of learning opportunities to meet skills needs.

### *UFI PARTICULARLY AIMS TO:*

Encourage new learners including those for whom there are currently barriers to learning, thus expanding demand for learning;

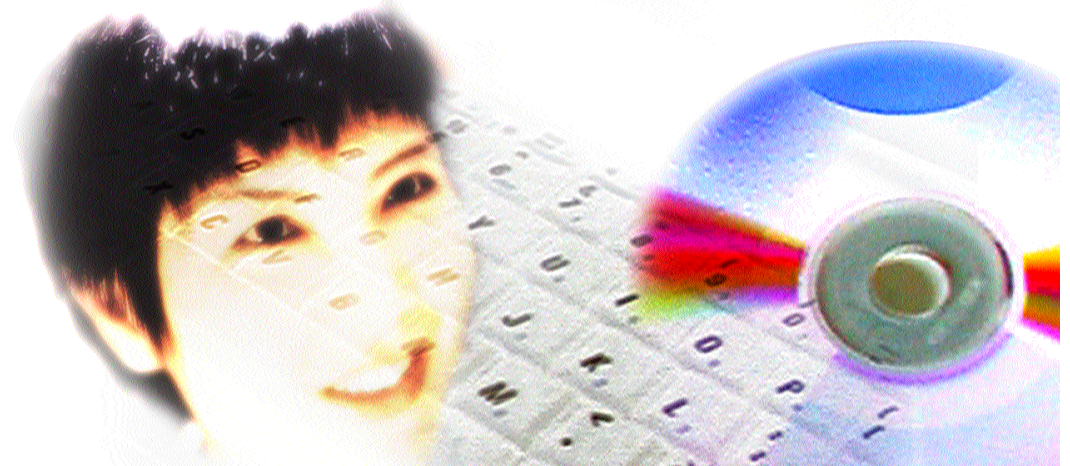
Ensure that the skills and training needs of SMEs are met more effectively;

Foster the use of new learning technologies including digital technologies.

## *A learner-centred approach*

Ufl aims to put the learner first with a customer approach to learning, both in the design and content of learning and its delivery. Its customers will be businesses, including the smallest companies, and individuals.

For SMEs, Ufl will allow employees, and indeed employers, easy access to learning in the workplace with complete flexibility in timing.



# *Ufl - Responding to the global marketplace*

## ***Working in partnership with training providers***

Ufl's objective is to help people improve their knowledge and skills in a way that best suits their lifestyles and the needs of their businesses. However, Ufl is not a provider or educational institution in the traditional sense, and does not have its own students or lecturers. Instead, Ufl's products and services are delivered through partners in a range of areas, encompassing the education and training sectors, employers, trade unions and local, regional and national government

### ACKNOWLEDGEMENTS

Of the many people and organisations who have contributed to the formulation of this guide, particular acknowledgements are due to:

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**Rowlands Codan Ltd**

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**Cae Mor Hotel**

**Training South Wales**

**Cardiff ITEC**

**Centre for Learning and Training at the University of Wales, Bangor**

**European Business and Management School, University of Wales, Swansea**

**SWEFIC (South Wales Education for Industry Consortium)**

**Anchor Computer Systems Ltd**

**Gyrus Medical Ltd**

**Riverside Plastics Ltd**

**Chandler KBS**

**North Wales Housing Association**

**FSB**

**Bangor University**

**Llandrillo FE College**

**UWCN**

# *Ufl - Responding to the global marketplace*

## ***The purpose of this guide***

This guide has been designed for use by the deliverers (tutors, teachers, trainers and support specialist) within organisations providing or considering the provision of training to SMEs. Its core purpose is to highlight a range of key issues which may need to be considered when the option of taking on a distance teaching/tutorial role is being contemplated. The Guide is structured as a series of questions for individuals considering involvement with flexible learning in general and via the University for Industry (Ufi) in particular.

There are four separate versions of this Guide, of which this version is

### OTHER GUIDES IN THIS SERIES ARE AVAILABLE FOR:

Managers within organisations providing flexible learning to SMEs.

Managers of SMEs.

Employees of SMEs considering training which includes elements of flexible learning.

For brevity and consistency, the Guide uses the term “flexible learning” to describe training delivered by means other than face to face, classroom-based instruction.

This includes paper, CD Rom, Internet, radio and television-based training materials, or any combination of these. There is, however, a deliberate focus in the guide on preparing users for electronic delivery mechanisms.

The Guide comprises a series of closed questions which ask for a yes or no response. If the response is “No”, an action is suggested. These actions should assist the user to more effectively support, or engage with, flexible learning.

### Note:

The recommended actions may not be appropriate in all circumstances. Discretion is required to evaluate the likely effectiveness of the suggested actions. In many cases, the recommended actions include discussions with others. Users of the Guide are encouraged to consider and assess the appropriateness of these actions in their particular situation.

# *Ufl - Responding to the global marketplace*

## *Glossary of Terminology*

- |                        |  |
|------------------------|--|
| 1. Deliverers          | Those responsible for delivering, or supporting the delivery of training.  |
| 2. Flexible Learning   | Training delivered by means other than face-to-face classroom-based instruction.   |
| 3. Hardware            | Computer and accompanying information technology required to deliver/ receive flexible learning.   |
| 4. Hub                 | Organisation or consortium appointed by Ufl to manage flexible learning for a sector or geographic area.   |
| 5. Learndirect         | National learning network being developed by Ufl. Free information and advice via the helpline and allows on-line learning at Learndirect centres. |
| 6. Learning Centre     | Local centres established by Ufl hubs to support flexible learning (eg by providing access to hardware).   |
| 7. Learner             | Employees considering or already involved in training.   |
| 8. Materials           | Electronic, physical or paper-based resources used as a basis for the delivery of flexible learning.   |
| Materials Developer    | Someone who authors/ constructs/ creates design materials for flexible learning.   |
| 9. Provider            | An organisation that develops and/ or delivers training.   |
| Managers               | All senior managers and/ or department heads in organisations delivering training.   |
| 10. SME                | Small to Medium sized Enterprise.  |
| 11. Software           | Computer applications or programs.   |
| 12. Sponsor            | (See "Workplace Sponsor" below).   |
| 13. Subject specialist | Person recognised nationally for excellence in designing and/ or delivering specific subject training.   |
| 14. Ufl                | An independent body aiming to stimulate lifelong learning via the Learndirect network and existing learning providers                              |
| 15. Ufl Champion       | Training organisation manager empowered to establish and support development of Ufl/ Flexible Delivery.  |
| 16. Workplace Sponsor  | A nominated senior staff member within an SME who has specific responsibility for assisting learners.  |





# *The Training Deliverers' guide to flexible*

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# Securing your Sponsorship

1	Have you considered and articulated why you want to become a deliverer of flexible learning/ Ufl's Learndirect courses, materials or support?	Yes TICK <input type="checkbox"/>	No?	Take time to consider and evaluate; discuss with your peers and immediate senior; discuss with your family – decide what you wish to achieve from assuming this new role.
2	Have you previously delivered flexible learning programmes?	Yes TICK <input type="checkbox"/>	No?	Identify colleagues with experience in flexible delivery. Ask them about the different demands, skills and approaches to teaching that flexible delivery may require. If this is not possible, refer to your Ufl Learndirect hub, as they may be able to supply you with contacts.
3	Have you identified the Ufl champion within your organisation and secured his/her support for your involvement in Ufl?	Yes TICK <input type="checkbox"/>	No?	Identify the Ufl champion in your organisation. Make contact and arrange a meeting to discuss your role and involvement with Ufl Learndirect courses. Also discuss with your immediate senior.
4	Have you considered the impact of flexible delivery on your current job?	Yes TICK <input type="checkbox"/>	No?	Consider the possible impact of time demands, and how these might impact on your current work environment.

## Personal Issues

5	Have you considered and discussed with your family the potential demands flexible teaching will make on your personal life?	Yes TICK <input type="checkbox"/>	No?	Talk to your family, and explain the implications of your new role, particularly with regard to the potential impact on your availability during "normal" leisure hours.
6	Have you discussed your role as a flexible learning deliverer with your colleagues and sought their support and co-operation?	Yes TICK <input type="checkbox"/>	No?	Take positive steps to engage colleagues in conversation, formal and informal, to explore the changes in your role as a flexible learning deliverer.
7	Will you miss the face-to-face contact with students? If so, how do you expect to compensate for this loss?	Yes TICK <input type="checkbox"/>	No?	Discuss with experienced flexible deliverers. Identify the things that helped maintain their motivation. Consider if it is likely that these things will motivate you.

## Pre-delivery

8	Do you have the basic IT skills required? E-mail, Keyboard, Internet proficiency, Document management.	Yes TICK <input type="checkbox"/>	No?	Enrol in a (Ufl) recognised basic IT course.
9	Do you have an understanding of, and access to, the hardware you will require?	Yes TICK <input type="checkbox"/>	No?	Consult your IT support services for advice on hardware specifications appropriate to your anticipated needs. Negotiate regular access if you need to share the facility. Contact your Ufl champion if this proves difficult.



# Pre-delivery

- |    |  |                                      |     |  |
|----|--|--------------------------------------|-----|--|
| 10 | Are you fully aware of the practical support available to you? eg: IT Support, Marketing Support, Legal Support, Financial and Training. Are these in place?   | Yes<br>TICK <input type="checkbox"/> | No? | Discuss with your immediate superior and/or your Ufl champion.<br>Obtain information about all authorised support services and contact points. Make yourself and the nature of your distance learning project known to the relevant contacts.                  |
| 11 | Where Deliverer decides to use a ufl course: Have you considered the implication of delivering a Ufl developed course? eg: not having control/ownership of course content, not being familiar with course. | Yes<br>TICK <input type="checkbox"/> | No? | Talk with an experienced flexible learning deliverer about engagement with materials developed by others. Take time to review the materials; consider their implications and possible areas of student queries; prepare your responses / suggested references. |

# Contact with SMEs

- |    |  |                                      |     |  |
|----|--|--------------------------------------|-----|--|
| 12 | Do you have a structured method for assessing business needs?  | Yes<br>TICK <input type="checkbox"/> | No? | Identify and familiarise yourself with a method for assessing business development needs which can be used in discussions with SMEs.   |
| 13 | Do you have a framework for developing a SME employee training plan and for assessing skill development needs? | Yes<br>TICK <input type="checkbox"/> | No? | Identify and familiarise yourself with a framework for constructing a comprehensive SME training plan and a mechanism for assessing SME skill development needs. Ensure you can succinctly explain these to SME management and employees (using appropriate illustration |

# Contact with SMEs

14	Have you had discussion with SME management to agree training objectives?	Yes TICK <input type="checkbox"/>	No?	Ensure that training objectives are agreed before any training course starts – clarifying expectations at an early stage can avoid later misunderstandings. Document and forward the agreed objectives to SME management.
15	Have you had discussion with SME management regarding their ability to accommodate flexible learning; do they have a process in place to manage flexible training?	Yes TICK <input type="checkbox"/>	No?	Open discussion with SME management – confirm that they have an understanding of the implications of introducing flexible learning within the company, and discuss the issues they will need to address.
16	Have you discussed with the SME manager the need to appoint a workplace sponsor? (A nominated sponsor who is responsible for supporting the learner in the workplace is a key element within a flexible learning framework).	Yes TICK <input type="checkbox"/>	No?	<p>Prepare suitable materials explaining to SME management the role of the workplace sponsor (covering responsibilities, time allocation, necessary level of empowerment and communication channels). Discuss the role with SME management.</p> <p>Ensure that the SME manager supplies you with the name and contact details for his/her nominated sponsor.</p> <p>Contact the sponsor before a training course commences to ensure that he/she understands the role and its importance in maintaining learner motivation.</p>

# Learner Support

17	Have you established an appropriate learner support framework?	Yes TICK <input type="checkbox"/>	No?	Give this consideration; anticipate the demands your course will make on your students, and what practical support you can make available to them. Recognise that new learners may require several forms of support.
18	Have you provided your contact details to the learners? (phone/email)?	Yes TICK <input type="checkbox"/>	No?	Document these details, and forward to each of the learners.
19	Have you established mechanisms to promote networking and discussions between students?	Yes TICK <input type="checkbox"/>	No?	Encourage learners to construct their own support group(s) by exchanging contact details and communicating with each other on a regular basis.
20	Have you established protocols for responding to learner queries and communicated these to the learners?	Yes TICK <input type="checkbox"/>	No?	Discuss these with the learners at the outset. Ensure that they understand you may not be able to respond immediately but that you will respond within the agreed time. Document and forward to the protocols to the learners.
21	Have you discussed with the learners the framework for studying via database or other technology? eg: What to do when they get stuck. Agreed times to phone, e-mail (including response times), Network contacts, Learning centre support and facilities, Agreed minimum time commitment, Study guidelines, On-line discussion forums, Learner self-help groups.	Yes TICK <input type="checkbox"/>	No?	Arrange a meeting / contact with the learners, and go through each of the issues highlighted. Agree the parameters. Document your agreements, and forward the details through to the learners as a reference.

# Learner Support

22	Do you have a support network of colleagues in place to share workload/relieve when you are on holidays etc.?	Yes TICK <input type="checkbox"/>	No?	Discuss with your Ufl champion and other flexible delivery colleagues. Ensure all agreements are documented and circulated to all relevant parties.
23	Have you established automatic mechanisms for emails to be transferred to a colleague if not accessed within specified time (eg. 24 hours)?	Yes TICK <input type="checkbox"/>	No?	Discuss with your colleagues to agree arrangements. Ensure that your ITsupport function has been briefed and that you have undertaken the necessary steps to ensure that transfer mechanisms are in place.
24	Do you know who the workplace sponsor is for each of your learners?	Yes TICK <input type="checkbox"/>	No?	Contact the SME management, and secure the point of reference details.
25	Has all of the above been discussed and agreed with your Ufl champion?	Yes TICK <input type="checkbox"/>	No?	Arrange a meeting with your Ufl champion to confirm above arrangements prior to any commencement.

# Learner Motivation

26	Have you considered the issue of maintaining learner motivation?	Yes TICK <input type="checkbox"/>	No?	Discuss the issue of maintaining motivation with experienced flexible training deliverers and your learners; identify possible difficulties for learners and discuss the means of overcoming them.
27	Have you included opportunities for students to undertake regular self-evaluations?	Yes TICK <input type="checkbox"/>	No?	Discuss the potential format of student self-evaluation with your learners, and agree how this will be applied.
28	Have you considered the potential of occasional group meetings for the students? If so, have you arranged a venue with appropriate facilities and set dates?	Yes TICK <input type="checkbox"/>	No?	Discuss this option with your students, and depending on practicality / willingness of learners to travel, arrange a series of group meetings with the objective of encouraging group support and exchange of ideas. Consider setting up a Web board.
29	Have the guidelines for confidentiality been agreed with the SME manager and the workplace sponsor? (i.e. agreed rules regarding when and who is involved in discussion of a learner's progress).	Yes TICK <input type="checkbox"/>	No?	Discuss and confirm with SME management, the workplace sponsors and the learners.

# Learner Motivation

30	Have you explained to learners the basic requirements and skills for flexible learning?	Yes TICK <input type="checkbox"/>	No?	Ensure that your learners have the basic tools for the course, and are comfortable with their ability to use them.
31	Have you equipped them with basic skills in time management and study skills?	Yes TICK <input type="checkbox"/>	No?	Discuss with your learners the principles of time management; agree with them appropriate study hours, both in terms of length and time of day, and fix objectives.
32	Have you ensured that there is/will be recognition (accreditation, certification) for the learner on completion of the training programme?	Yes TICK <input type="checkbox"/>	No?	Recognised accreditation is an important factor for flexible learners; discuss this with your Ufl champion, and ensure that this is in place.



# Course Development

33	If constructing materials: Have you identified appropriate, current methodologies for constructing flexible learning courses and examples of good practice flexible learning materials?	Yes TICK <input type="checkbox"/>	No?	Source current methodologies and examples of best practice materials. Familiarise yourself with the methodologies and the materials. Talk with experienced flexible deliverers about constructing courses and materials
34	Have you ensured that the content is easily accessible to new learners?	Yes TICK <input type="checkbox"/>	No?	Pilot the materials in trial focus groups.
35	Have you used a variety of relevant media? Materials - points to consider: Core content should be available in print, CD Roms are primarily useful for illustrative purposes, Websites promote interactivity and can be regularly updated; PRINT- Avoid producing pages of unbroken text; Digital TV.	Yes TICK <input type="checkbox"/>	No?	Review materials with a view to identifying areas for improvement. Act on this review.
36	Have you used a variety of stimuli? E.g. visuals, anecdotes, graphs, interactive discussion, case studies, exercises?	Yes TICK <input type="checkbox"/>	No?	Maximise learner interest and involvement by increasing the range of teaching stimuli used. (This should engage more learners because of the likely range of preferred learning styles in your cohort).
37	Is the course constructed on a modular basis?	Yes TICK <input type="checkbox"/>	No?	Ensure that your courses are available in bite-sized modular units to maximise the opportunities for learner engagement, motivation and success.

# Feedback Mechanism

38

Have you established mechanisms to update materials based on feedback from students?

Yes  
TICK ☐

No?

Discuss with your Ufl champion and your Ufl hub to agree mechanisms for updating materials (see Appendix B).

39

Have you established mechanisms for collecting feedback from SME management?

Yes  
TICK ☐

No?

Discuss feedback mechanisms with SME management, covering content, timescales and possible resulting actions (see Appendix B).

# APPENDIX A – Flexible Learning

*The following web sites  
may be of interest/ assistance:*

<http://www.lifelonglearning.ac.uk>

(The Marchmont Project website)

<http://www.eds.napier.ac.uk/distance/index.htm>

(Napier College – includes a guide to writing flexible learning materials)

<http://fcit.coedu.usf.edu/distance/>

(A Teacher's guide to Distance Learning)

<http://www.westga.edu/~distance/jmain//.html>

(Journal of Distance Learning Administration)

<http://www.mailbase.ac.uk/lists/flexible-learning/>

(Provides a UK discussion network for staff in Higher Education)

<http://www.cfl.mq.edu.au/cfl/flexible/cflflex3.html>

(General guide to the development of flexible learning resources)

<http://www.shu.ac.uk/schools/hcs/fldc/index.html>

(Provides comment / guidance on Accreditation)

<http://www.ufi.com>

(Ufi website)

<http://dti2info1.dti.gov.uk/guide/index.html>

(dti website)

# ***APPENDIX B – Evaluation***

***The following web sites may  
be of help and assistance in formulating  
evaluation mechanisms:***

<http://tortie.me.uiuc.edu/~m-lester/Evaluation/Index.html>

General Introduction

<http://www.megataq.mcg.gla.ac.uk/information.html>

<http://artsnet.heinz.cmu.edu/systems/marketing/evalfeed.html>

General



# *Appendix C – Useful Contacts and Telephone Numbers*

## **Ufi Ltd Wales**

Technocentre  
Beignon Close  
Ocean Way  
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