

Flexible Learning Templates for Dispersed Learners: Expanding the Role of the Content Expert Without Pain

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INTRODUCTION

Program development is an art, not a science. Learning is a mysterious process and deciding on, designing and then conducting a programme of learning for a group of adults will require imagination, flexibility and willingness to take risks. (Newman, 2000, p. 59)

The challenge faced by managers of staff development programmes in multinational enterprises is: how to reach all staff with appropriate learning opportunities just in time, ensuring the maximum impact at the lowest possible cost per learning hour. The constraints are considerable, among them: limited staff time for learning, learners' attitudes to learning, supervisor attitudes to learning, limited staff development budgets, widely dispersed staff, and variable technological skills and access to technology. While knowledge of adult learning as well as open and distance learning best practice (the science) is essential, a good measure of imagination, flexibility, and risk taking (the art) certainly helps.

The UNHCR Flexible Learning Templates project was the recipient of the 2004 DEANZ Award of Excellence in Distance Learning. The citation noted that the templates are an "example of the use of best practice in professional development, including learner centred design and 'just in time' availability of resources to support practitioners." In this article, we will describe the context, design, and delivery of a set of easily accessible, flexible learning tools aimed at distant and dispersed learners. We will describe the context, technology, and experiences to date with a set of bespoke but replicable learning templates.

THE CONTEXT The Office of the United Nations High Commissioner for Refugees (UNHCR) is mandated to provide protection and assistance for more than 20 million refugees worldwide. It is one of the larger UN agencies with more than 5,000 staff, a third of whom work out of the Geneva headquarters with the remainder, both international and locally recruited staff, dispersed in 277 offices in 120 countries. While some offices are in the country capitals, many field offices are in small towns quite distant from capitals and not surprisingly in remote border areas. The

staff development function is managed by a staff of 10 in the Staff Development Section (SDS) based at headquarters. SDS manages the centralized training budgets, shapes and drives learning policies and practices, develops and delivers learning activities for generic and managerial competencies, and develops tools to facilitate learning in the organization.

The SDS staff are augmented by two important networks: Training Providers and Learning Coordinators. The former, who are primarily but not exclusively headquarters based, are subject matter experts in the various functional divisions and sections who, as one part of their job function, facilitate learning activities. They are allocated staff development funds to design, develop, and deliver functional learning activities for all staff. The Learning Coordinators are staff who have volunteered or been appointed in country offices to coordinate learning opportunities for staff in their offices. They can draw on training materials developed in Geneva or use locally allocated funds to source and arrange learning activities applicable for their locally assessed needs. Where they have the skills or can acquire these skills (UNHCR provides a four-month distance learning programme in the Facilitation of Learning), they often develop and deliver country-specific learning activities.

Since 1999, in recognition of the dispersal of the organization's staff and their expressed desire for easy access to a greater number of learning opportunities, SDS with both equity and access in mind and under the banner of the "democratization of learning" turned to flexible, open, and distance education or learning (FODE) as the preferred delivery option.

THE CHALLENGES

The Nature of the UNHCR Learner

What is the profile of the UNHCR learner? Clearly, the most important element is that they are widely dispersed. Furthermore, each office is different: some are in the "deep field" with a staff of one or two, while at the headquarters in Geneva there are more than 700 staff. This has a number of implications, including the level of information and communications technology (ICT), the nature of hierarchical relationships, the size of teams, and the implications that has on team learning and peer support for learning as well as the physical learning environment. The last cannot be underestimated, as often distance learning solutions place the onus on the learner to find suitable learning space in the office or at home (Tait, 2002). In the case of many locally recruited UNHCR learners in the developing world, learning space is sub-standard, certainly at home, so the office provides the best physical space for learning. This, however, has the disadvantages of a lack of privacy and, during work time, the learner is plagued by interruptions.

The UNHCR learner is busy, as the humanitarian imperative imposes an urgency and importance on staff members' functions. Learning, particularly in the workplace, is sometimes seen as a betrayal to the cause at worst or, at best, a time waster. In some cases the learner feels guilty rather than proud of the fact that he or she is undertaking a learning activity.

The UNHCR staff member is ageing. While the average age of staff only moved from 42 years to 44 years between 1990 and 2000, there was a significant ageing of senior managers (UNHCR, 2000). This has implications on FODE in

two ways. First, on attitudes to learning, the younger generation sees continuous and lifelong learning as normal, if not a right. Conversely, older staff come from the "job for life" mindset and do not necessarily feel they need to update their skills. Indeed, for them, "experience" is what counts and new learning can be construed as admitting inadequacy. And, it is these managers who make decisions on learning policy. An extension of this is the generational competency and attitude towards information technology, from basic word processing and e-mail to online discussion and chat. The implications for FODE are evident, as learning becomes more public, as it is increasingly on-site rather than in the safe environment of the workshop. To many older staff this is threatening, increasing learner anxiety and insecurity.

UNHCR, by its very mandate, expands and contracts with the increase and decline in refugee situations worldwide. In addition, with almost 90 percent of its income coming from voluntary contributions of donor governments, programmes can be affected from year to year by funding shortfalls. Both factors increase the job insecurity of many, particularly local, staff. In addition, local staff have often had access only to inferior educational opportunities. UNHCR provides many with their first access to an international working environment, to a modern office with computers and communications technology, and to an English or French (that is, a second language) setting. Thus, there is much to learn in the new work environment and many realize that here is an opportunity to gain additional skills which might allow for "promotion" to an international post and thereby greater job security or for a greater competitiveness on the local job market. These factors

have led to a thirst for learning among local staff, particularly after a learning drought in the 1990s. FODE, due to increased learner access, can provide the means to quench this thirst.

How to Promote FODE Options

Berge (quoting his 1998 collaborative work with Schreiber) describes the four stages of organizational maturity in regard to distance education: separate and sporadic distance learning events; an infrastructure that supports distance learning; the existence in the organization of a distance learning policy; and distance learning is institutionalized. Berge clarifies that these stages are neither linear nor discrete. UNHCR is probably hovering between stages 3 and 4.

Distance learning events, some of them quite complex and extensive, are taking place. For example the core of the learning repertoire is a series of nine-month learning programmes in the main operational areas (refugee assistance management and refugee protection) as well as general management, which primarily use self-paced learning modules whereby the learner undertakes real time and real work activities in the workplace. A "facilitation of learning" programme blends distance facilitation and guidance with workbook exercises undertaken in the workplace prior to attendance at a seminar. Since 2003 a suite of off-the-shelf e-learning courses has been accessible to all staff. However, if UNHCR is to achieve Berge's "transformation" from instructor-centred to learner-centred training and from project events to the integration of FODE into the organizational strategies, policies, and behaviours, additional tools for FODE need to be developed and enhanced.

How to Support Training Providers

The development of distance learning programmes is a collaborative activity. It comprises design, development, and delivery stages as well as distinct roles. Conventional wisdom dictates that for distance learning to be effective, no stage should be ignored and each role player should have the requisite expertise. Teamwork between each of the actors is considered critical to success. While the same person or team of persons may implement a number of stages, it is common practice to separate the roles of content and process. Content experts are chosen on the basis of their expertise on content and another set of skills is normally required for the development of the process. For many content experts the transition from the familiar classroom to distance learning is a challenge. The skills required for compiling a teaching course and writing self-study or trainer materials for others are quite different (Murphy, 2000).

In many organizations, and UNHCR is one, it is not always possible nor is it cost-effective to separate the tasks of content expert and course compiler. It was in this context that UNHCR explored the options for facilitating the work of the content experts by providing a user-friendly intuitive tool to convert content into the written course materials. The roles of content specialist, writer, and graphic designer are effectively collapsed into one.

Primarily the objective was to provide content experts with a user-friendly, intuitive tool to convert their own content expertise into learning materials. To attain this goal we chose to develop three templates to allow the easy creation of written course materials—templates for a workshop facilitator's

guide, a workplace coaching guide, or a self-study workbook. This not only results in cost savings but places greater control over the creative and development process in the hands of the content expert and is potentially very satisfying and empowering, leading to a higher degree of motivation. It is action learning at its best, whereby the content expert is not only passing on new content to others but is learning new skills in the process.

One such skill is basic learning design. The first choice the content expert must make is whether to select the workshop facilitator's guide, a workplace coaching guide, or a self-study workbook. The choice depends on subject matter, learner location, learning preferences, cost/benefit considerations, and all the other typical considerations that a learning needs assessment will generate. The content expert must make these decisions beforehand or seek advice to guide the decision. In doing so, a very powerful message is conveyed to the content expert: there are more ways than one to deal with a learning need. Workplace and workbook options are added to the workshop (traditional one-size-fits-all solution to learning) option.

All three templates facilitate distance learning. This is self-evident for the self-study template. And although, for the workshop and the coaching template, the facilitator and the coach respectively are often not separated from the learners at the point of delivery, with various technology options they may well be. The templates provide the flexibility of delivery choices, and access issues are addressed through their easy availability by the learning coordinators in all field offices.

The templates also address the need for usability of materials. Considerable thought was given to the design of the templates, with the application of simple design and the use of culturally

acceptable and gender-neutral graphics. A common look and feel is important, yet the developer is provided with a degree of flexibility to adapt and scope for creativity.

Materials Development and Production	Course Delivery
Develop own	Use own delivery system
Commission from elsewhere	Commission another agency to deliver course
Buy "off the shelf"	Buy in existing course delivery system
Modify existing materials	Buy into modified course delivery system

Choices: Buy or Develop?

While the objectives were clear to the development team in UNHCR, there remained a number of options. Calder's (2002, p. 12) model, which is summarized in the table above, sets out the choices.

For course delivery, the choice was not an issue, as the products were intended for in-house delivery and no outsourcing was intended. For the development of templates a search of external suppliers both commercial and nonprofit was unsuccessful. Existing solutions used complex, often expensive technology, which required training to operate and often ongoing maintenance or upgrade charges. Suppliers we contacted were not able to respond to the flexibility of providing the three different template models we required and the development costs were considerable. Finally, the options available tended to assume the separation of responsibilities between content specialists, instructional designers, and graphic designers.

To convert the concept into reality, we turned to an external consultant, albeit with previous experience in working in UNHCR, but who was a wizard (a

real one, not the Microsoft version) in MS Word functionality.

Technology Choices

The consultant was asked to develop the templates following established internal guidelines contained in various UNHCR resource materials, while giving consideration to existing industry-standard practices as well as developments in adult learning principles. The choice of technology was neither obvious nor easy. We looked at the *who*, *what*, and *how* questions before deciding upon the final choice: *Who* would be using the technology? *What* were the desired outcomes? *How* would it be implemented?

Prime considerations in our technology choice were the disparity between the "old school" and "new age" skills and attitudes of the staff (discussed earlier in this paper), the physical remoteness of a high proportion of UNHCR out-posted staff, and the involvement of content experts external to the Staff Development Section. While adhering to the prevailing in-house culture, we were mindful of the need to maintain a forward-looking approach in developing a robust, easy-to-

use product that would stand the test of time and not leave us languishing in a pre-e-learning void. High on our list of importance was look, feel, and ease of use.

In arriving at our final “back to basics” decision (a series of Microsoft Word and PowerPoint templates with detailed step-by-step user guides), we had taken a path down a somewhat winding trail of technology to arrive at two final candidates. In a full-circle approach, we started with UNHCR’s standard word processing software (Microsoft Word), moving to a dedicated authoring software (AuthorIT, <http://www.author-it.com/>), and finally back to MS Word.

AuthorIT had a principal advantage over MS Word, as it was developed specifically as a content-management software. It seemed the obvious choice. AuthorIT’s motto, “Author, Manage, Publish,” was exactly in line with our ultimate goal to publish all learning material as a workbook, on a CD-ROM, or on the UNHCR intranet. AuthorIT is a 100 percent dedicated authoring tool for the development of user documentation and electronic help files. In addition, AuthorIT’s flexibility to import from, and export to, MS Word and the ease with which it publishes Web-friendly output were major positive considerations.

What tipped the balance in choosing MS Word, however, and the resultant compromise, was consideration of the end user. MS Word was familiar territory and the new templates would require minimal training. Intuition and exploration would suffice for the experienced user while a simple user guide, possibly complemented by a help desk, would serve the novice adequately.

Template Development

Using basic MS Word functionality, the consultant developed three templates: a Facilitator’s Guide, a Coaching Guide, and a Self-Study Workbook. Each guide comprises a title page, a contents page (which builds itself), a pre-written introduction (on, respectively, facilitating, coaching, or how to manage one’s self-study habits), a learning objectives page, followed by the learning activity chapters. Each of the chapters provides templates for the particular learning methodology. For example, the Facilitator’s Guide has a workshop plan, a unit (lesson) plan summary, and a template for each facilitated session, with fields for learning objectives, time required, resources/equipment, preparation, activities, session wrap-up, review, and additional comments (“lessons learned”). This particular guide also includes a place-mark for a participant welcome letter and a supervisor/supervisee Learning Contract.

The “look and feel” is pre-set with wide margins and pre-selected fonts. The templates contain click-and-type form fields, built-in bookmarks for document cross-references, the automated generation of odd and even page headers, a collection of watermarks, attractive (culturally and gender neutral) icons, and page border graphics. In addition, three add-in job aids (situational, checklist, and work-flow) can be applied in order to describe typical workplace job tasks. A set of four customized PowerPoint templates with UNHCR logos is provided for the Facilitator’s Guide.

In essence, the templates are delivered ready for topic customization. As a consequence, content specialists, whether internal or external, with only average

word processing skills are now able to produce exceptionally high-quality materials in the minimum time, thus allowing them to concentrate on the content while the formatting and the “look” take care of themselves.

The UNHCR Learning Templates have been included as a drop-down option in the Word menu bar on all of UNHCR’s networked installations. They are also accessible on the UNHCR intranet and on CD-ROM for those staff without access to the UNHCR LAN, and for those who wish to develop learning tools outside the workplace.

The developer who wants to develop a learning guide thus first decides, on the basis of the end-user profile and the subject matter, which one of the templates is most appropriate. Having made that choice, the developer selects one of the three options and the appropriate template appears, together with a toolbar. The *UNHCR Learning Toolbar* is the jewel in the crown, as all automation lies therein: document styles, a collection of graphics, text boxes, icons, various add-ins, etc. The toolbar provides access to drop-down menus from which the style may be applied or the object inserted into the template. The developer populates the fields as appropriate and can delete those which are not required. The end result is a clear, simply designed, attractive learner guide. It is extremely quick to develop and content experts with little instructional design and graphic design experience get rather rapid satisfaction.

We were particularly cognizant of the fact that several external content experts would be contracted to develop module content. Contractors or UNHCR staff working at home on their own equipment

face very different challenges to those using the same tools in an office environment. The off-site worker does not necessarily have anyone to ask for help and, given the varying time zones in which we all work, access to a hotline, technical support, or help desk may be impractical. For these kinds of workers, usability in its fullest sense is vital. This, and the desire to instil a culture of self-help among our own staff, prompted the development of the detailed step-by-step user guides. The *UNHCR Learning Templates—Getting Started* guide describes the functionality of the templates and is sufficient to get even a beginner up and running.

IMPLEMENTATION STRATEGY

In many ways, with the implementation of the templates we were attempting to promote UNHCR’s learning approach to further incorporate what Garrison and Anderson (2003) define as second and third generation e-learning technology. They describe second generation as an emphasis on independent study and use of media to produce content and support learning. Third generation e-learning is described as taking advantage of synchronous and asynchronous interaction via technology and embracing constructivist learning theories (e.g., problem-based learning, collaborative projects).

While the nature of our humanitarian work naturally poses some technical limitations (e.g., staff members working in refugee camp settings with limited to no Internet access), we strived to extend the reaches of technology through the templates to increase the use of self-paced courses with or without tutoring and the availability of electronic course materials. Through the implementation of the learning templates to create self-

study learning materials, we also felt that it would foster the use of other communication modes to take advantage of interaction among learners and to encourage communities of practice where possible to enhance the learning. Although full Internet access may be limited in certain areas, learners generally have access to e-mail. For instance, to support collaborative learning with our staff members we have successfully used e-mail tutoring and listserv technology in addition to exercises in workbooks created with the self-study learning templates. In this way we are able to foster diverse ways of learning and promote various forms of human interaction.

The team involved in introducing the learning templates felt that it was important to start the promotion of the products early in the project cycle for two key reasons. The first was to elicit involvement from the stakeholders—namely Training Providers—as they were viewed as very important to the eventual adoption of the new technology. The second was to gain early successes which could be used as good practices. The latter was very important to the project team, since the template project coincided with an overall shift in UNHCR's learning strategy to a much stronger collaborative, learner-centred model.

At the project initiation phase the overall goal was to achieve the highest possible adoption rate by our Training Providers. For this, we used a four-fold strategy which was not necessarily linear. The strategy itself was created in response not only to the project stages and timelines, but to the new way of viewing learning.

The Four Elements of the Implementation Strategy

1. Develop a plan for stakeholder involvement. To achieve early adoption and support, the project team requested the help of key users, a core working team, to assist with the template development process. The purpose of the working team was to provide input to the design and development of the templates. A series of focus groups led by the consultant was held, where the key users were invited to provide their feedback on the initial prototypes. The users also had the opportunity for hands-on experience with the templates in the later phases of the design. As a result we had users who were familiar with the technology and had some success in creating their own materials for use immediately in their own situations.

2. Build in-house technical support and include this throughout. The need to ensure in-house technical support was seen as an important part of the plan. While we could expect that the template users would be comfortable with word processing skills, not all had experience in using Word templates or basic manipulation of images and graphics. Although our goal was to create user-friendly templates, we felt that it was also important to support the users as much as possible should they run into any difficulties.

To do this, the project team initiated a meeting with the existing in-house technical support group at UNHCR. At that meeting, we introduced the template concept and successfully secured their help to support users with their initial testing and implementation questions. In addition to this support, we established a second level or tier of help through the project team itself.

When we have asked the users, they have indicated that the support system seems to work well and they are satisfied with the response times.

In our initial plan we incorporated the use of hands-on group courses or coaching sessions to help users learn the template technology and the ideas behind their design. We found, however, that it is much more effective to provide one-on-one coaching where needed. Where possible, we also make connections between Training Providers who are using the templates so that they are able to provide support to each other and to share new ideas on how the technology can be used.

3. Create a strong user-support plan.

In addition to technical support, we felt through our experience in past technology implementations that it was equally important to support the non-technical issues when using the templates. For instance, would Training Providers have questions about learning theories and instructional design? Would they be wondering how to use design-effective learning? Would the use of the templates generate further interest in adult and workplace learning issues? The individual coaching is proving useful in raising and addressing these types of questions. In addition, references to the templates and how they may be used is made in regular in-house learning programmes targeted at Training Providers to develop their skills.

During the focus group sessions and in the infancy of the template implementation, we discovered that the majority of the Training Providers—our key users—were positive about the templates and the changes that they were introducing to the design of

learning materials (e.g., more white space, use of advance organizers, clearly stated learning objectives, transitions from one section to another, use of graphics). At the same time we came across some users who were more reluctant to adopt the new approaches favouring heavy use of text and limited use of graphics, their previous practice. While we have worked with them to find a compromise solution, there is still some way to go before full adoption of the newer design ideas. Given that our Training Providers' primary role is as a Subject Matter Expert it is sometimes a challenge to convey the important linkage between the design of learning materials and effective learning. Advocating a support rather than control role, our focus has been to help raise awareness of the benefits of improved design.

4. Develop a comprehensive promotion plan.

While our focus was primarily on headquarters-based staff members, we saw a clear need up-front to develop a comprehensive promotion plan. Given that the responsibility for learning is widely distributed throughout the organization, promoting template usage outside of the larger learning programmes, which are developed and managed from headquarters, was seen as very important. While we are very pleased with the progress so far at headquarters, we are planning to expand the promotion to include more field-based training providers.

CURRENT TEMPLATE USAGE

Currently the learning templates are being used in primarily the ways we anticipated: as learning materials that provide for self-study or supplement learning activities. They are also being used in ways we did not envision at the start of the project.

After the introduction of the templates, several Job Aids have been developed both by the staff who support overall learning at UNHCR and by content experts. One example is a guide to the creation of surveys and needs assessments for learning within the organization. Another that is currently underway is a guide to the use of presentation software that emphasises good use of graphics and layout.

The Self-Study template has been one of the most popular of the options available. One Training Provider has used the template to create an orientation self-study guide on the international protection of refugees. Other similar projects are also underway and have been initiated primarily through the result of personal contact and promotion by the earlier users.

One of the most ambitious projects to make innovative use of the Self-Study template is a management learning programme. The programme is in the latter stages of design and development and involves more than 20 stand-alone modules, which are provided mainly as self-study supplemented by e-mail tutoring and face-to-face components. While the basic layout and design of the templates is respected, the management learning modules will have their own particular look or brand so that they are identifiable to the learners. As this is a flagship programme for UNHCR, it was important that the formatting and layout provide a high quality example for others to use in their own design.

In another case, the template was modified to become the participant manual for the four-month Facilitation of Learning programme. As the purpose did not fit neatly into the initial concept

for the template, some changes were required. With the help of an intern, we were able to change the resulting Word document without having to modify the template itself. We also required the documentation in electronic format, and to keep the file size small for e-mailing to our field locations, we minimized the use of graphics and images. For printing purposes, we used only black and white to reduce costs and time for preparation. Participants gave very positive feedback on the materials and are happy that the units are available easily in electronic format

Lessons Learned During Implementation

After a relatively short implementation period, some lessons are already evident:

1. Involve your Information Technology stakeholders early so they can have input into the design of the template technology and be prepared to support the initiative. This support could be in the form of technical support and also help to build enterprise-wide acceptance of the templates.
2. Include future key users in the design and testing process. You may discover some users who are more reluctant to adopt better practices for the design of learning materials. It is in the early stages that we identified potential problems and issues from users and tried our best to minimize the impact throughout the implementation.
3. Consider the value of gaining support from colleagues who lead training and learning in the organization, whether centralized or decentralized. Their role can be important to supporting the initiatives and modelling effective usage of the technology. Furthermore, use the templates as much as possible to

provide good examples of usage and promote their adoption into mainstream learning design.

4. Encourage innovation and anticipate examples of unconventional usage.

5. Identify a consultant (or in-house developer) who is willing to listen to the organization's needs and be a partner in the implementation process from design through to implementation.

An Indicator of Success

Imitation is the best reference. Given the simple construction of the templates, they are easily customizable for other agencies. Indeed, the UN system agencies have a rather active learning community and developments in one agency are frequently shared with others. A number of agencies have been invited by UNHCR to adapt the templates for their use. This may be as simple as changing the UNHCR logo and watermark to theirs, but can easily allow for changes in graphics, icons, and text styles as well.

A number of significant spin-offs have manifested themselves since the formal launch of the UNHCR Learning Templates project.

The merits of using AuthorIT for the desirability of an eventual *SDS Documentation Library* database were noted during the development. As a plan-ahead strategy, therefore, the styles in the Word template and the AuthorIT template that publishes to Word have been mapped to correspond. Future output created and produced using AuthorIT would, in effect, be indistinguishable in terms of appearance from that created and produced using MS Word—and vice versa. This allows for more qualified staff, familiar with

the more complex yet more versatile AuthorIT, to convert completed learning guides seamlessly to HTML for Web or CD-ROM.

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