

TOPIC 8

Project Planning, Production, and Distribution

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1. Overview

These materials support discussion on the topic of the planning process for the development of a media component of a course in open and distance learning. The specific focus is the development of an audio component. However, the key questions that need to be considered and acted upon by those involved in the planning, preparation, development, and delivery of an audio component apply in general terms to other kinds of production as well.

1.1 Source materials for this topic

Kemp, J. *Planning and producing audiovisual materials*. New York: Harper & Row, 1990.

Rowntree, D. *Teaching with audio in open and distance learning*. London: Kogan Page, 1994.

Thomas, J. *Report to SACHED on producing audio for intermediate distance education*. Cambridge: IEC, 1995.

2. Assumptions

The materials that follow assume that

- the main media for teaching and learning will be print-based (for example, correspondence texts, other printed material, or computer-based material); and
- that audio is likely to be used in a ‘supplementary’ or ‘supportive’ role to print.

It is also assumed here that users of this material will be generally familiar with the basic characteristics and approaches of distance and open learning.

Discussion: Check out your own and your participants’ assumptions with the following questions:

- Are these assumptions correct in the participants’ particular situations and contexts?
- If not, what adjustments need to be made?

3. Stages of development

The stages in the development process for audio suggested here are interrelated and overlapping. Nonetheless they are useful in identifying the key questions with which planners need to deal.

3.1 Planning and design

We can think of planning and design at two main levels:

- the overall planning and design of a series or sequence of ‘programmes’ that make up the audio component of a course; and
- the detailed planning and design of an individual programme or segment that is part of the series or sequence.

In this section we are primarily concerned with the first of these two levels.

In approaching the overall planning and design of a series of audio programmes for open and distance learning, the following checklist may be useful:

- audience;
- aims and objectives;
- content and structure;
- form and format; and
- support material.

Audience

Most of the important questions about the characteristics of the target audience have been raised in Topic 3 (Instructional Design). However, it is worth asking here whether there are specific characteristics that relate to the use of audio.

Discussion: Prompt discussion about audience with the following questions:

- What *access* will the learners have to audio equipment — both for playback and recording? Can we assume *individual* access? Or will provisions need to be made for group listening?
- What experience, if any, will the learners have had of learning from audio? What are the implications of this in terms of the presentation of audio materials and the need to develop appropriate study skills?

Aims and objectives

Assuming that print is the main medium of instruction and that audio is playing a supplementary and supportive role, audio can be used in two basic ways:

- to provide tutorial support to learners; or
- to offer supplementary learning material, which can enrich and deepen the learners' experience of learning.

Tutorial support offers an opportunity for open and distance learning tutors to talk directly to their learners:

- to introduce sections of the course;
- to provide help with difficult concepts and ideas;
- to give advice and guidance on how to approach assignments and practical work;
- to offer generalised feedback on the work that learners have been doing;
- to motivate and encourage;
- to provide help with study skills; and
- to compensate for the isolation of the distance learner.

Supplementary material can bring learners a range of experiences that are difficult or impossible to communicate through print or face-to-face contact, including the following:

- voices of national leaders;
- views of people with particular experience and expertise;
- argument and debate on key issues, to stimulate discussion and encourage learners to form their own opinions;
- documentary and drama, through which learners can be transported to real-life or imaginary situations;
- resource material on which they can work; and
- opportunities to apply knowledge and skills and to explore values and attitudes.

The advantages of supplementary materials is that they

- are attractive to learners;
- add a more 'human' dimension to learning activities;
- add variety to experience of learning; and
- relieve the potential tedium of working only with print.

Discussion: Use the following questions to explore the aims and objectives of your own and your participants' programmes:

- What general aims and specific objectives might audio serve for a particular course? What exactly do we want to achieve through the use of audio? How could the medium be used most effectively for the target audience?
- What sort of balance should be struck between tutorial support and supplementary material?
- Can a policy statement be formulated on the use of audio, to be of practical help to those involved in the planning and development of the audio component of a course?

Content and structure

Key questions here are:

- How will the audio material relate to the learners' work on the printed units?
- What role are the audio materials expected to play in face-to-face contact sessions?

Discussion: Prompt discussion about content and structure with the following questions:

- What subject matter or topics will the programmes deal with?
- In what order should they be presented to the learners?
- How will the audio programmes relate to the printed materials for the course? Should there also be a link between audio and the face-to-face sessions?
- Will audio time be allocated on a roughly equal basis between the modules; for example, 30 minutes of audio per module (that is, three sixty-minute duration cassettes) for the course? Or should the available time be concentrated on particular parts or aspects of the course?
- Is it possible to draw up a 'series outline' for the audio, which indicates the main topics to be covered, the order in which they

will be dealt with, and their relationship to other parts of the course?

Form and format

‘Form’ can be defined as a particular type of audio material, including:

- scripted talks;
- unscripted interviews and discussions;
- actuality and commentary;
- archive material;
- music; and
- scripted and improvised drama or simulation.

These forms

- can be presented as they stand; or
- can be combined, for example, in a documentary or ‘magazine’ format or as drama with narration, tutorial commentary, or both.

‘Format’ can be defined as the way in which various forms can be combined in audio presentation.

Even at an early stage it is necessary to think in general terms about the type of programmes that are likely to be needed, since they have important implications for

- resource requirements (human, technical, and financial); and
- the time scales involved and scheduling.

Discussion: Prompt discussion about form and format with the following questions:

- What types of audio material, in terms of form and format, is the project likely to require?
- What resources will be needed to develop and produce this material: human, technical, or financial?
- How long will the process take? What should be the relationship between the schedule for audio and that for print?
- Given the resources and time available to the project, are the emerging plans for audio realistic? Or do they need to be modified to take account of what is practically possible?

Support material

A good deal of evidence suggests that the effectiveness of audio cassette materials can be substantially increased by combining them with specially prepared and carefully integrated print materials. This integration can promote the active involvement of learners in learning from audio. For example:

- *before listening*: to prepare learners for listening;
- *during listening*: to help concentration, promote active listening, and extend the range of subject matter; and
- *after listening*: to reinforce and revise.

3.2 Development and production

The planning and design stage involves working out the main ideas about how to approach the project and defining a framework within which it will operate. The outcome is a 'blueprint' for the development of audio.

The development and production stage involves realising those ideas in the form of a series of audio programmes and associated print materials that can be distributed to learners for use in the course. The outcome is a set of cassettes, with accompanying print materials, that are ready to be sent out to learners.

Three main sets of questions need to be addressed:

- What resources will be needed to develop and produce these materials?
- How can these resources be most effectively organised and managed?
- How long will the process of development and production take?

3.3 Resources

Three main types of resources are required for developing and producing audio and related print materials:

- human;
- technical; and
- financial.

Human resources

You need two main types of people to make good quality audio and print:

- *subject specialists*: people who are knowledgeable and experienced in the subject areas covered by the course. Their roles are to:
 - advise on the content of the programmes and print and text; and
 - contribute to them as writers, presenters, interviewers, panel members for discussions, and so on; and

- *audio production specialists*: people who have knowledge, skills, and experience in the development and production of audio materials and supporting print , especially with reference to education. Their roles are to:

work with the subject specialists in the design and development of programmes; and

see the audio materials through all the stages of production.

People it is also useful to have access to:

- audio technicians, to assist in the studio recording process;
- graphic designers, to help with the layout of the print materials;
- specialists in developmental testing and formative evaluation; and
- secretarial and administrative support.

Discussion: Prompt discussion about human resources with the following questions:

- What access does the project have to subject specialists within the course team and in the wider open and distance learning community?
- In addition to those who are involved in developing print units, would it also be worth drawing up a list of other distance educators who might have a contribution to make in the realisation of the programmes?
- What access does the project have to educational audio production skills, internally and externally in the immediate region?
- Is there a case for involving producers from outside the organisation in the production process?
- Alternatively, should the project aim to develop in-house production skills through workshops or other means?
- What other skills does the project have access to, for example, in terms of technical support, graphic design, developmental testing, and secretarial and administrative skills? If necessary, can these services be brought in on a part-time basis?
- Are there other ‘human resource’ needs that have not been identified so far?

Technical resources

The main technical resources for an audio project are:

- good quality portable equipment for location recording, including cassette recorders, microphones, leads, and headphones;
- professional or semi-professional fixed equipment for copying from cassette to open-reel tape, for editing open-reel tape, and for producing a master cassette copy from which multiple copies can be made;
- access to a professional audio studio for recording the final version of the programmes;
- access to high-speed high-quality multi-cassette copying equipment; and
- sufficient supplies of consumables for this equipment, including good quality sixty-minute audio cassettes, open reel recording and leader tape, and editing supplies.

Discussion: Prompt discussion about technical resources with the following questions:

- What audio equipment does the project possess? Is it in good working order?
- What additional equipment will the project need to acquire? Are there funds available for this purpose?
- What professional studio facilities should the project use? What will they cost?
- Are good quality multi-cassette copying facilities available locally? What does the service cost?
- What volume of 'consumables' will the project need? Where are they available from, and at what charge?

Financial resources

Now it should be possible to start developing a budget for the audio component of the project.

On the technical side, estimate:

- the amount of studio time required;
- the volume of multi-copying to be undertaken; and
- the amount of consumables needed for the project.

On the human resource side, estimate:

- whether production will be in-house or contracted out;
- if contracted out, the amount of producer-time required;
- the volume and type of production envisaged;
- whether to pay outside contributors to the programmes; and
- if outside contributors are used, what type of contributions should be paid for and how much.

It may be useful to distinguish between ‘above-line’ and ‘below-line’ costs:

- *below-line costs*: fixed costs that will need to be incurred whether particular programmes are made or not; for example, in-house staff, equipment, and overheads;
- *above-line costs*: variable costs that involve specific expenditures on programmes; for example, studio bookings, contributors’ fees, and travel expenses.

Discussion: Prompt discussion about financial resources with the following questions:

- Given the decisions already made, how far can you go in developing a budget for producing the audio component of the course?
- What costs do you know already? What costs can you estimate? What additional information do you need to complete the budgeting process?
- Are sufficient funds available within the project to allow you to develop and produce the audio in the way currently envisaged? Or will you need to modify your plans to match the financial resources that are available?

3.4 Management

Some sort of ‘course team’ will likely be responsible for developing the learning materials. A course team is a group of people working together to plan, design, develop, and produce learning materials.

One or two of the people from the course team should take on specific professional or managerial responsibilities for the development and production of the audio and print components.

Ideally the person or persons in charge should be generally familiar with open and distance learning and have professional experience and expertise in the production of audio for education. If two people were allocated to this task, one could focus specifically on audio production and the other on the print materials.

The main functions that need to be covered in this area are:

- overall, co-ordinating and managing the development and production of audio material and print;
- initiating, supporting, and supervising all aspects of the audio production process and associated print production;
- assuring ‘quality’ in the production of audio and print materials, both in a professional or technical sense and in terms of their educational effectiveness;
- reporting to the course team on the progress of the audio; and
- ensuring the integration of the audio with the development and production of the print materials.

Discussion: Prompt discussion about management with the following questions:

- Who should take on the main responsibility for the co-ordination and management of the audio component of the course?
- Is there a case for sharing the responsibilities in this area between two people, with one concentrating on audio, and the other on the print? If so, can you identify two such people?

3.5 Scheduling

Scheduling is a difficult area in which to generalise. It depends on

- the type of programmes that are being produced;
- the context in which production is taking place;
- the resources and facilities available to the producer; and
- the producer's involvement, energy, and experience.

One general rule: The process of producing audio materials tends to take longer — and sometimes considerably longer — than optimistic planners anticipate.

One way of approaching scheduling is:

- to identify the sequence of tasks that a producer needs to accomplish to develop and produce an audio programme and print; and then
- to make a rough estimate of how long each task is likely to take; and
- to build in a reasonable allowance for contingencies.

Scheduling Time Estimates for Audio Production

Task	Description	Time estimate
Planning	Finalising the programme outline, including making final decisions on aims and objectives, content and structure, and support material	Half a working day
Research	Consulting, identifying, and selecting key contributors and suitable materials for the programme, including writers, interviewers, panel members for discussions, and actuality and archive material	One day
Commissioning and collecting	Approaching, contracting, and briefing key contributors; pre-recording and assembling material for programme use	Two working days

Compiling	Selecting, editing, and ordering pre-recorded materials	One to two days
Scripting and support material	Drafting the studio presentation script and preparing draft support material to accompany the programme	One to two working days
Studio script	Finalising the studio script and support material; duplicating and distributing to those involved in programme, including presenter, contributors, and technician	Half a day
Rehearsal and recording	Assembling the final programme in the studio	Half a day
Post-production editing	If necessary, modifying the final programme and support material in terms of content, length, or both	Half a day
Scrutiny and approval	Submitting the final recorded programme and support material to the course team for information and approval	Hour or two?
Copying and packaging	Arranging multi-copying of cassettes from a master tape, labelling, and storing, ready for distribution	Hour or two?

Roughly between seven and nine working days are needed for one programme plus printed support.

Not all programmes will take the same amount of time:

- a simple 15-minute talk will be quicker to produce than a complex 30-minute documentary;
- experienced producers will work faster than new ones;
- working time is usually spread over a longer period as producers will typically be working on a number of programmes simultaneously; and
- it is wise to add on extra time for unexpected contingencies and developmental testing.

What this means is that

- for fairly simple 15 to 30 minute programmes, with straightforward support material, you should probably allow one producer-week per programme; and
- for more complex programmes requiring a good deal of location recording and tape editing, you should probably allow at least two working weeks per programme.

Very roughly, therefore, if

- a course is producing three sixty-minute cassettes (180 minutes);
- you made one 30-minute programme per module; and

- half were ‘simple’ and half ‘complex’,

then you would need to allow at least nine producer-weeks for production.

As a rough guide, you need to assume that you need about 13 or 14 weeks of a producer’s working time to produce three hours’ worth of good quality audio, with well integrated print materials.

To be on the safe side and to cover unforeseen events, including sickness, family commitments, and equipment breakdown, add another week or two, bringing the total to 15 or 16 weeks, or nearly four months.

In the actual scheduling, two dates are key:

- the date on which you want to distribute the materials to learners (work backwards from that date); and
- the date on which the first draft of print materials that audio is supplementing has been completed (this date is the earliest start date for audio production).

Discussion: A scheduling checklist would include the following questions:

- How long do you think it will take to develop and produce the audio programmes and the printed support material needed for the course?
- What is the latest date by which you need to start development and production?
- What is the earliest date by which it will be possible to start development and production?
- Can you now develop a joint schedule that will combine and integrate the development and production of the main print units for the course, and the audio materials and accompanying print?

3.6 Distribution

The assumption being made is that the audio programmes are to be distributed in the form of cassettes rather than via broadcast (that is, radio). The relative advantages of cassettes and radio broadcasts are set out elsewhere in this kit (see Topic 4, Media characteristics).

The questions here are practical ones:

- How can we get the audio material and accompanying print to learners who are registered on the course?
- How can we get it to them in a form that will be attractive, inviting, and easy to use?

We can explore the questions further, in terms of

- packaging; and

- actual distribution or dispatch.

Packaging

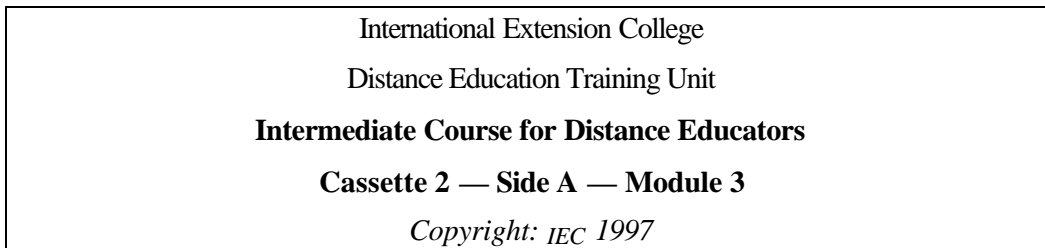
Clear labelling of cassettes is important

- for the image of the institution;
- for the convenience of learners; and
- to make it possible to refer simply and unambiguously to the tape in the printed materials.

The labels need to include

- the name of the providing institution;
- the name of the course;
- the number of the cassette; and
- the part of the course to which it relates.

Sample Audio Cassette Label



Packaging can consist of

- clear plastic boxes;
- inlay cards; or
- some sort of plastic wallet or container to store the cassettes.

Money spent on this sort of packaging will save money on replacement tapes in the long run.

Dispatch

In countries where the postal service is reliable, open and distance learning materials are usually dispatched by mail.

Where the postal service is less reliable, a number of alternative means are used:

- private carriers;
- local bus services; and
- learner collection through local centres.

If local centres are used, there are additional advantages:

- induction sessions can be held face-to-face;
- basic study skills can be offered;
- baseline data can be collected on learners; and
- administrative functions such as registration can be carried out.

Discussion: Prompt discussion about physical production and dispatch with the following questions:

- How will the cassettes be labelled?
- How will they be packaged?
- How will they be dispatched to learners?

3.7 Utilisation

Will the audio material be used by groups or by individuals?

The decision will be guided by

- learners' access to cassette players and sources of power;
- pedagogic considerations, related to the sort of learning experiences the course team wants to stimulate through the use of audio;
- cost implications, in terms of the number of cassettes to be produced and distributed; and
- the possible need for training tutors or group leaders in the use of audio materials.

Individual use

The advantages of having individuals use the audio cassettes are that individual use:

- makes possible integrating very closely the use of audio with the learner's work on the main text. Learners can move freely and at their own pace from work on the text to work on related audio and back to the text;
- makes possible a highly learner-active approach, since learners can control the tape, undertake individual study activities related to what they hear, and listen when, where, how, and as often as they like; and
- exploits the essentially 'personal' qualities of audio material.

Group-based use

The advantages of having groups use the audio cassettes are that:

- learners follow up listening by group discussion and other group-based study activities;
- group listening provides an opportunity to share reactions to the programme, share information and experience, and learn from each other; and
- groups can be tutor-led or peer-support with leader chosen from among group.

Group leaders will need training, also support materials such as the handbook linked to audio materials.

Discussion: Prompt discussion about how the material will be used with the following questions:

- What access are learners likely to have to audio cassette players? Will they have individual access at home? Will some learners need access through study centres?
- What opportunities will be available to learners for face-to-face group meetings linked to the course? Where will these take place? Are such facilities likely to have audio cassette players or will they need to be provided? Is there a budget for this?
- Should the audio programmes be designed for individual listening or for group-based use? What are the pedagogical and practical arguments that need to be considered here?
- What would be the implications of the individual versus group decision in terms of the number of cassettes to be produced, the support materials required, and the need for tutor or group leader training?
- Is there a case for exploring the possibility of producing dual-purpose programmes? What would be the advantages of this? What would be the drawbacks?

3.8 Monitoring and evaluation

Monitoring and evaluation in open and distance learning tend to focus on the quality of materials and their effectiveness in terms of learning outcomes. Here a broader approach is suggested, focusing on

- the learner services that support the materials;
- the materials themselves; and
- the processes through which the materials were developed and produced.

Evaluation is seen not as a one-off event conducted by specialist researchers but as a continuous process undertaken by all those involved:

- senior people at management level;
- writers;
- producers;
- local tutors and co-ordinators; and
- learners.

Planning and design

In the working relationship between subject specialists and media specialists, tension can arise because of different professional interests and perspectives can be harnessed positively by:

- recruiting as media producers people with appropriate academic background;
- training staff in skills of media production;
- involving people with audio expertise at the earliest stage of planning and design;
- evolving broad agreement on areas of responsibility in planning and design, including content and form or format; and
- monitoring, evaluating, and improving process on an ongoing basis.

Development and production testing

It is essential, particularly for the early programmes in a series, that they be developmentally tested with a representative sample of the target audience. During testing, ask the questions in the following checklist.

Development and Production Testing Checklist

- How do learners react to the programmes and the ir accompanying material?
- What do they like about them? What do they dislike?
- Is the technical quality satisfactory? Can they hear the programmes clearly? Is the print material easy to follow?
- How useful do they find the materials as part of their overall study programme?
- Is the audio and its accompanying print well integrated? How well does the audio fit in with the main print materials?
- How effective is the material in achieving its educational objectives?
- How could it be improved?

Distribution testing

The main object of monitoring the distribution is to check that the right materials get to the right learners in good time for them to begin their studies. When testing distribution, ask the questions in the following checklist.

Distribution Testing Checklist

- How efficient and effective is the system of distribution?
- What problems were encountered?
- How could they have been avoided?

- If different distribution methods were used in different areas, how did they compare?
- Which type of system seems to be the most efficient and economic?
- How could the distribution system be improved?

Utilisation testing

In the case of individual use, the questions that need to be asked are essentially those suggested earlier in the discussion of the developmental testing and formative evaluation of the audio materials.

In the case of group-based use, these questions will still be relevant, but additional questions will need to be asked about the context in which the programmes are used, as in the following checklist.

Utilisation Testing Checklist

- How easy is it for learners to attend the group-based sessions? What proportion of learners attend? Is attendance regular, or is there significant drop-out? Why?
- Is the organisation and administration of the group meetings satisfactory? Were the necessary materials and equipment available? Could everyone hear the programmes clearly? Was the physical arrangement and atmosphere conducive to effective learning?
- How useful do learners find this type of group-based learning? Is there evidence that they value and benefit from the opportunities of sharing and exchanging information, ideas, and experience? Do learners in fact seem to learn from each other?
- What role do the tutors or group leaders play in the learning experience? Are they well-prepared? Do they facilitate and support the distance learning materials? Or do the sessions move toward conventional classroom teaching? Has the training for tutors and group leaders been adequate and appropriate? How might it be improved? Do the tutors or group leaders themselves have adequate support and supervision?
- How far do these answers go in informing the decision about whether audio should be used on an individual basis or in groups? Is there a case for further exploration in this area?

Monitoring and evaluation

In addition, the process of monitoring and evaluation itself needs to be monitored and evaluated by asking the questions in the following checklist.

Monitoring and Evaluation Testing Checklist

- Is the process producing the sort of information the course team needs?
- Is it being presented in a useful form?
- Is it available at a time when it can be acted upon?

- Or does it come too late for effective action?
- How can the system be improved?

Discussion: Prompt discussion about monitoring and evaluation with the following questions:

- How should we monitor and evaluate our own performance in the planning and design of the audio component for the course?
- What procedures need to be designed to monitor and evaluate the development and production process for audio? How can we encourage and maximise academic credibility, educational effectiveness, and high professional standards in audio production? What can we do to promote efficiency?
- How can we monitor and evaluate the distribution process for audio and accompanying print? Is there a way in which we could compare the efficiency and effectiveness of different distribution methods?
- What methods can we devise to monitor and evaluate the use of audio by learners following the course, either individually or in group situations? How can we measure the effectiveness of the medium, and find out how it can be improved?

More generally:

- Who would be involved in the monitoring and evaluation of the audio component? Can we allocate specific responsibilities to particular people? Should someone be appointed to take overall co-ordinating responsibility for this area?
- How should the findings of the monitoring and evaluation activity be communicated to staff? How can we ensure that the right people get the right information in the right form at the right time?
- How can the monitoring and evaluation of audio be integrated into the more general processes of evaluation for the course as a whole?
- How can we monitor and evaluate the evaluation process? How can we ensure that it is serving the needs of those involved in developing the course and those who will be following it?

4. Practice exercise

4.1 Preparing a planning document

Instructions: Ask participants, either individually or in teams or pairs as appropriate, to prepare a detailed planning document for the design and development of audio materials and supporting print materials for some course of their choosing. This document should serve a number of functions:

- It should incorporate the main decisions reached on the key questions and issues raised in this section of the kit, and outline the general approach being adopted to the design, development, production, distribution, and proposed use for audio and its accompanying print within the course.
- It should pay particular attention to the relationship between the planning process for audio and related materials, and that for the development and production of the main printed components of the course.
- It should identify key personnel who will take overall responsibility for developing audio and accompanying print materials; outline any training that these people may require if they are in-house personnel; indicate the sources of personnel if they are being contracted from other organisations, or all of the above.
- It should include a preliminary costing estimate for the human, technical, and financial resources that will be required for the project.
- Finally, it should include a preliminary schedule for the planning, development, and production of the materials.

The questions that are interspersed throughout this section of the kit will serve as useful guidelines and checklists for participants as they work their way through this exercise.

Timeframe: One to two days, depending on complexity of task assigned. The exercise can be carried out as the discussion of this topic goes along, point by point, if desired.

Materials: This kit.