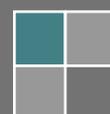


JOURNEYS TO OPEN EDUCATIONAL PRACTICE: TENSIONS & CHALLENGES

UKOER/SCORE Review Final Report

**A CUMULATIVE EVALUATION
AND SYNTHESIS OF THE
ENTIRE HEFCE FUNDED
INTERVENTION IN OER**



CONTENTS – TENSIONS & CHALLENGES SECTION

4. Tensions and challenges around Open Educational Resources (OER) and Open Educational Practices (OEP)	3
4.i. The broader context	3
4.ii Demand for OER	3
4.iii. Enhancing pedagogy	4
4.iv. Models for OER release	4
4.v. Community models	5
4.vi. Accessibility, re-use and adaptability.....	6
4.vii. Educational institutions	6
4.viii. Partnerships and collaboration.....	7
4.ix. Involving students	7
4.x. Embedding and sustaining open educational practice	8

4. TENSIONS AND CHALLENGES AROUND OPEN EDUCATIONAL RESOURCES (OER) AND OPEN EDUCATIONAL PRACTICES (OEP)

The work of the HEFCE-funded OER initiatives in the UK have, over the last three years, surfaced some interesting tensions that merit consideration for anyone or any organisation looking to fund or establish new initiatives or simply looking to engage with open Educational Resources (OER) and Open educational practices (OEP). Throughout the [UKOER/SCORE Review Report](#) we have identified and discussed these tensions and challenges and present these here as a summary.

4.I. THE BROADER CONTEXT

OER and OEP must be viewed within the wider political, economic, social and technological contexts which impact on cultures of sharing learning resources and educational practices. These are discussed in the [OER journeys](#) section. The UKOER Programme has undoubtedly supported and encouraged OER release, and to some extent can provide an antidote to more restrictive or protectionist academic cultures. As academic staff engage with OER we see shifts in attitudes around open sharing and a renewed consideration of academic practice within their own contexts. At the same time, though, some teaching staff perceive that OER might undermine the traditional teaching/learning relationship and potentially might even make it easier for educational institutions to reduce staff numbers. The cultural aspects of OER and OEP have been a significant focus of both UKOER and SCORE activities and by recording changing perceptions and capturing the impact of these initiatives on those involved we have had an opportunity to surface some of the tensions that can present real barriers for individuals, institutions or communities to move forward into OEP. Barriers are discussed in more detail in the section on [Critical factors to support open practice](#).

During an early programme meeting of the pilot phase of UKOER we surfaced a strong desire by participants to explore the ethics of OER release by UK educational institutions in the context of a global market for education¹. There was a degree of concern over potential negative effects of OER release by developed economies and education systems. Some UKOER projects had international partners and there was an appetite to explore the international dimensions and implications of the programme. Two different models of international partnership were evident among the projects: donation, and experience sharing. At a national level political aspects also featured early in the programme as questions emerged around how far open practices challenged or supported notions of traditional university education². Throughout the programme this debate has run in parallel to the change of government and university funding regime in the UK.

The current financial climate can discourage innovation unless direct benefits are proven in terms of, for example, new markets, student numbers, and shared costs of development and teaching. However, the well articulated benefits of engaging with OER and OEP in terms of showcasing, reputational enhancement and attracting potential students may prove persuasive to institutional managers. There is, however, a tension over who will get the recognition, the individual or the institution. Thus there is a need to consider the balance of collective responsibility for quality, institutional branding, and marketisation, with incentives for individuals to showcase their own learning/teaching expertise and with the desire to enhance pedagogy through OEP.

4.II DEMAND FOR OER

We might anticipate that, at a fundamental level, motivation to release OER should reflect some existing demand for OER. There has, to some extent, been an implicit expectation that there would be

such a demand, similar to that around the notion of sharing discussed in the [OER Journeys introduction](#). Using the word 'demand' brings us into the territory of business language (demand/supply, producer/consumer, business models, business cases and benefits) which has challenged some sections of the HE/FE community. These words imply that there are definitive answers that can be answered by one-size-fits-all models, and support simplistic notions of measurement. They tie in with some of the motivations around cost efficiencies, marketisation and representational enhancement.

Identifying demand for OER has been one of the factors determining the models for release and reuse adopted by the different stakeholder groups. As perceived demand for OER came from a variety of users such as enrolled and prospective students, teachers, casual learners and CPD users, models chosen for release and reuse were influenced by stakeholder motivations, expectations, needs and the perceived benefits. Throughout the UKOER programme demand has been measured by tracking mechanisms around OER themselves and through engagement activities with stakeholder groups. Our [wide sector poll](#) in July 2012 identified as significant a lack of awareness around the potential of OER and their benefits by both individuals and institutions. This was also reflected by the numerous UKOER and SCORE engagement activities that focused on articulating the benefits both within specific institutions and stakeholder groups or with the wider UK HE community.

4.III. ENHANCING PEDAGOGY

As discussed in detail in the [Motivations section](#), tensions often emerge from differing motivations of the various stakeholder groups and these can present challenges for institutions, but also for individuals who may be subject to conflicting motivations. For example, using open approaches to implement a situative pedagogy may be a key motivator for an individual teacher but this might be challenged by the legal risk to the institution of hosting the required open collaborative platform. The motivation to enhance pedagogy, in particular, can conflict with other motivations that are more business-led, such as cost efficiencies or reputational enhancements, although broadly enhancing the student experience is a key motivational factor for institutions who are starting to consider their students as 'paying customers' with expectations, demands and needs. There is potentially a conflict between what educators may believe to be the most effective and appropriate pedagogy and what students actually demand.

An interesting aspect of an 'enhancing pedagogy' motive is the emphasis on the value of the OER creation and development process rather than on the finished product. This can lead to new curriculum processes and relationships with learners when they become involved in this process, resulting in new roles for learners and teachers, and changing practice and culture within subject discipline communities and educational institutions. The HEFCE-funded OER initiatives highlighted the importance of changes in curriculum development practices to improve pedagogy, which is founded on a commitment to open access to knowledge and to a philosophy of collective intelligence. A key motive for some participants has been the potential for radical transformation of Higher Education.

4.IV. MODELS FOR OER RELEASE

OER release models are often complex and these are usually shaped by a range of factors including:

- funding sources
- intentions behind release (strongly linked to anticipated benefits)
- stakeholders involved

Tensions around models sometimes stems from the fact that there are a number of different lenses through which to consider OER release and that most approaches incorporate a range of different models. So for example, one can consider funding models, pedagogic models, hosting models,

institutional, community or individual models. We discuss this in more detail in the [section on Models](#). Choices made in relation to one model or aspect of release often impacts on other models and there is a lot of crossover. This can result in confusion in both describing and understanding which models are being adopted. So for example one individual teacher releasing OER may be connecting into a subject discipline community model and an institutional model. These different models may not always combine together well. An individual may have their own personal model for OER release but have to operate within a more formal institutional or community model.

The kinds of tensions surfaced by the UKOER programme illustrate some of the challenges presented by complex overlapping models. For example, there may be a perception that releasing content as an individual, or within a subject consortia poses less of an issue in relation to IPR, which would seem to imply that there was less risk involved. This also raises issues in relation to institutional branding - if an individual produces materials as part of a contract with an educational institution then they need to be very clear about ownership and what institutional policies mandate in relation to open release, particularly if the institution is identifiable on the resource. To a large extent this has probably not been much of an issue to date as most institutions have not had OER strategies or policies. As more institutions include OER within their institutional documentation individuals may find it more challenging to deposit outside of their institutions. An interesting pattern emerged for some subject consortia members who found that depositing within institutional repositories or systems provided a useful managed place to deposit which could then be referred to from the subject community service and wider portals and services.

Perceptions around how the OER may be used can also impact on models for release. UKOER projects often differentiated between potential use by students and teachers and several felt that the two groups needed OER presented in different ways - including wrap-around support incorporated within OER as well as guidance to use offered in presentation mechanisms. We also noted some tensions emerging around models where OER were produced for very specific user groups, with subsequent negative impact on accessibility and usefulness for wider groups of users.

4.V. COMMUNITY MODELS

There is evidence that an open sharing approach, addressing issues of release, hosting and reuse, can be effective and sustainable, particularly where communities share clear common interests. In one interpretation, the most compelling case for open sharing exists at the level of a community within a discipline. However, even within close-knit communities, sharing could be impeded by the existence of different institutional quality processes, different levels of institutional commitment to OER, and different levels of expertise and institutional support for role and practice change. Strong collaborations are needed to overcome such barriers and to give confidence in quality assurance processes.

In many cases an OER project can serve to bind together an existing or new community, and the excitement of belonging to a community with a commitment to sharing resources can drive change. Communities also provided a safe environment for those who were nervous about OER, such as teachers who wished to release initially only to their own institutional or discipline colleagues. However, while community may encourage first steps into open practices, it may be fundamentally antithetical to the basic philosophy of open access to knowledge which posits access by all, whatever their values. Resources developed within a community, for a specific audience, will tend to be conservative, conforming to the values and expectations of the audience, for it is by those values that quality will be judged, and in the audience's context that resources will be reused. In this sense, over-reliance on trusted communities and community based tools (that might require a

specific login) may inhibit long-term significant change, especially where reputation or efficiency rather than a commitment to open access are the real underlying motive.

4.VI. ACCESSIBILITY, RE-USE AND ADAPTABILITY

As noted above some interesting tensions emerged where particular models and approaches, whilst supporting engagement and practice change at individual and institutional level, resulted in the release of OER for very specific audiences, such as one particular course or one particular group of students. This has led to some OER being released that are not necessarily accessible, or easily re-used by broader groups. Poor accessibility of OER can sometimes relate to technical and licence choices but may also be the result of pedagogical choices and limitations.

Other educators are often the intended recipients of OER and it is important to note that an important impact of the programme has been to increase the number of OER in particular subject areas. An initial premise of the programme was that increasing the corpus of OER would promote use and engagement. It has been noteworthy that some projects report successful use of Jorum to find OER and also refer to OER released during earlier phases.

Academic staff are routinely using OER as part of their curriculum delivery although in our 2012 university staff awareness survey more than 50% of staff had heard of the term OER compared to only 18% in 2009, and were more familiar with JORUM and other OER repositories. Staff were regularly using OER and many were sharing. Workshops on OER are now embedded within the PGCert at De Montfort, and staff training is continuing to develop the digital literacy skills and copyright awareness required for OER to be scaled-up within the organisation. As Ming suggests (2012), our next step is probably going to be an institutional-wide strategy for digital literacy and promoting open education and practice. (HALSOER Final report)

Despite these positive reports some phase 3 UKOER projects reported difficulties in trying to re-use OER developed in earlier phases.

UKOER projects highlighted some challenges around measuring how far the OER are re-used or re-purposed, not least due to challenges around definitions of re-use and re-purposing. It could be argued that all use requires some element of re-purposing for each different context. The problem for projects is that tracking downloads does not actually provide information about how the OER is being used. One solution adopted across all phases has been to integrate mechanisms to collate information about use, for example through comments and survey forms, into the resources themselves. Most projects in phase three devised comprehensive evaluation activities to provide feedback on the OER through various stages of testing or release with controlled groups, through surveys, focus groups, workshops and interviews. These evaluations were usually focused on the intended target user group/s and many of these may have also been involved in scoping or user requirements activities at the beginning of the projects.

4.VII. EDUCATIONAL INSTITUTIONS

Educational institutions may become involved with OER and OEP for a range of reasons. Tensions may emerge around a focus on marketing and reputation for both educational institutions and other sector bodies. Whilst this motivation might be the critical factor for an organisation to engage with OEP and/or OER, its impact on the resulting models can be significant. For example, an approach led by marketing/reputational requirements can result in a focus on developing and releasing branded high quality, well packaged OER which makes smaller, less polished materials unacceptable against the formal quality control mechanisms. It could be argued that the latter, however, may be more re-usable and adaptable for other educators illustrating how this kind of conflict can affect both what is released and how re-usable the OER is.

A marketing/reputational motivation can also conflict with another significant institutional motivation, that of efficiencies and cost saving. It costs much more to produce polished and packaged high quality resources needed to maintain a reputation and to market these effectively. Institutions need to balance these different motivations, make choices that reflect their own context and strategies, convey this through policies and procedures and support staff to make necessary changes.

Tensions can also emerge as institutional strategies change, so previous motivations such as a vision of universal access to knowledge may conflict with new strategies around commercial practice. This kind of conflict is not insurmountable but is likely to require changes in practices and possibly in institutional culture. This latter example also highlights challenges where motivations to adopt open approaches requires changes in practice that may be slow to occur. It can be challenging for this kind of change to happen across the institution when initialised by individual champions or project teams situated in one department or faculty. We discussed this earlier in the section on [Critical factors to support open practice](#).

4.VIII. PARTNERSHIPS AND COLLABORATION

The UKOER programme and SCORE initiatives provided evidence that engaging with OER can sometimes encourage radical practice change among the project team and close associates, but this may also have more to do with forming new partnerships, opportunities for cross disciplinary and cross sector discourse, and reflection around designing learning materials for different contexts. Tensions emerge where partnerships involve a range of organisations with significantly different visions and goals, but these tensions themselves can lead to new valuable conversations and sharing which, although challenging, result in innovative approaches, enhanced pedagogy and changing practice. UKOER phase three projects, in particular, provided some compelling evidence of this and many established new relationships that can be taken forward into other areas of work.

We have evidenced that OER development and use challenges established community boundaries, especially where learners or international partners are involved. Traditionally these might have been assigned the role of “audience” - recipients of resources. There is evidence from some projects that this view is breaking down and that, for reasons both of sustainability and enhancing the learner experience, learners and international partners are beginning to be seen as co-producers or re-purposers of OER. There is a flattening of the former hierarchical relationship which is coherent with the underlying philosophies of open access to knowledge and collaborative development. But this erosion of community boundaries, in turn, erodes the comfort zone of those nervous about OER release and OER quality, and the value of communities as a driver for change.

4.IX. INVOLVING STUDENTS

Student engagement throughout the UKOER programme was varied and reflected different approaches and models. One UKOER project in phase two, identified three approaches which were also reflected by projects in other strands:

- 'Content approach' - existing content repackaged
- 'Connoisseur approach' - students as reviewers
- 'Creative empowerment approach' - students as producers and actively critiquing peer OER

By the third phase student involvement was more widespread with students being recognised and paid to support projects in other ways, gaining valuable experience of 'authentic' work practices in their discipline or profession.

However not all feedback from students was so positive - reinforcing the notion that they can be very focused on activities that contribute to grades as well as some concerns about paying a fee and then seeing lectures being made freely available to non-payers.

Virtually all members of the [student] group had not really interacted with the materials in any way whatsoever. So, I asked them why this was the case, and the various (though quite standard) responses related to the 'context' (or perceived rationale) to actually embark upon such activities. The group (even the few students who had made at least some attempt to access the OERs) identified as part of their feedback, that, as undergraduates, their preference is to focus upon specific and directed research, self-directed activities that can 'clearly' (and positively) influence the grades attained in assignments (and exams). (C-SAP final report, 2011)

While the shift on focus in the sector from Open Educational Resources to Open Educational Practice has been valuable in advancing teaching in open environments, and there are some notable exemplars, there is little empirical evidence of learners' active engagement in learning. Overall, we have some evidence of a shift in mindsets of academics towards 'open pedagogy' where students can set learning pathways and be the producers of content. However, progress in this area may be inhibited by a focus on educational content rather than learning activities (although the phase 3 UKOER COMC Project based at Coventry University is the exception with its focus on open courses). Change requires a fundamental shift focusing on learners' ability to learn in open networks. Whilst many UKOER projects involved students in a variety of ways the focus was often on the OER themselves.

4.X. EMBEDDING AND SUSTAINING OPEN EDUCATIONAL PRACTICE

Emerging OEP, if adopted and supported at institutional or community level is likely to impact on long term use and sustainability of processes to release and use OER. During the pilot phase we did not talk about 'open educational practice' (as this term emerged during phase 2) but we did see how far activities around releasing OER had the potential to question existing pedagogic practice and transform this for individuals, communities and educational institutions. Project activities encouraged new conversations amongst different groups across institutions and saw the need for new roles and practices for individuals. These new practices appear challenging at several levels and a significant element of project work was focused on supporting people, communities and institutions to take their first steps in their own OER and OEP journeys.

Engaging with the concept of openness and considering some of the benefits and challenges was the inevitable first step and a range of approaches emerged to support this:

1. events and workshops around OER as a concept (increasing awareness)
2. producing support and guidance materials
3. developing and maintaining Communities of Practice
4. cross-team collaboration (input from different professionals/services leading to increased understanding)

From this then followed steps to support changes in existing practice

1. providing new conceptual frameworks to support open practice
2. capacity building across a wide range of roles and departments (technical, curriculum design with OER, IPR, digital literacy, open practice)
3. creating a culture of openness across the institution (encouraging sharing)
4. securing senior management support
5. linking OER activities to institutional vision, strategy and policies
6. ensuring that institutional infrastructure supports open practices (including adequate resourcing - particularly acknowledgement that time is a significant factor, technologies to support open release)
7. cascading good practice through champions
8. developing mechanisms for recognition and reward (such as inclusion in performance review and appraisal mechanism)

9. embedding OEP within Continuing Professional Development (CPD) activities (teacher training, staff development)
10. creating new roles or changing existing roles and responsibilities

These two lists provide an interesting mix of introductory activities to *increase awareness and engagement*, through activities to *support existing practice change* to institutionally supported approaches that can *embed and sustain ongoing changes in practice*. UKOER and SCORE participants turned their attention to sustainability at an early stage of the funding period, probably led by both the funding calls and programme officers. A workshop held by SCORE brought together pilot phase UKOER projects to discuss their experiences around sustainability which led to the development of a [manifesto for sustainability \(May 2010\)](#). Sustaining such practice change requires a reconsideration of existing strategies, policies and operational procedures and workflows. Throughout the three phases of UKOER attention was paid to strategies and policies.

It can take a lot of effort from project teams and OER champions to get practitioners to change, and, as evidenced elsewhere in this report, this also requires significant institutional and/or community support. Projects in phase three reported challenges around general awareness of OER and OEP, and also lack of knowledge around appropriate use of third party materials. Although we have evidence of significant practice change, projects are also aware that there is still a fair way to go to make this practice mainstream. This leaves us at the end of the UKOER programme and SCORE activities with some tensions around how far this work will be maintained and sustained in light of current financial restraints, and also how far other institutions will take up some of these positive outcomes and outputs, particularly as OER have to some extent been eclipsed by the current focus on MOOCs (Massive Open Online Courses).

Good practice in OER development and use, is good learning and teaching practice. This potentially provides a starting point for engaging academic staff with the OER agenda. (EDORproject final report, 2011)

Footnotes

1. Blog post by JISC Programme Manager Heather Price (nee Williamson) October 2009 <http://elearning.jiscinvolve.org/wp/2009/10/23/oers-internationalisation/>
2. OERs, capitalism and social totality - Richard Hall, De Montfort University developed an ongoing discussion involving David Wiley and Joss Winn by arguing for the 'need to situate OERs within the totality of critical social theory as applied to education, rather than simply treating them as fetishised commodities or shareable goods.' He also considered the issues around exporting the Western model to other countries. <http://www.richard-hall.org/2011/12/07/oer-capital-and-critical-social-theory/>

ON THE WIKI: [HTTP://BIT.LY/HEFCE-REVIEW-TENSIONS](http://bit.ly/HEFCE-REVIEW-TENSIONS)
 BACK TO: [CRITICAL FACTORS TO SUPPORT OPEN EDUCATIONAL PRACTICE](#)
 FORWARD TO: [RECOMMENDATIONS](#)

The UKOER/SCORE Review report is available on the UKOER Evaluation and Synthesis wiki, supported by supplementary pages containing evidence and detailed analysis.