Aligning Open Education with Strategic Goals

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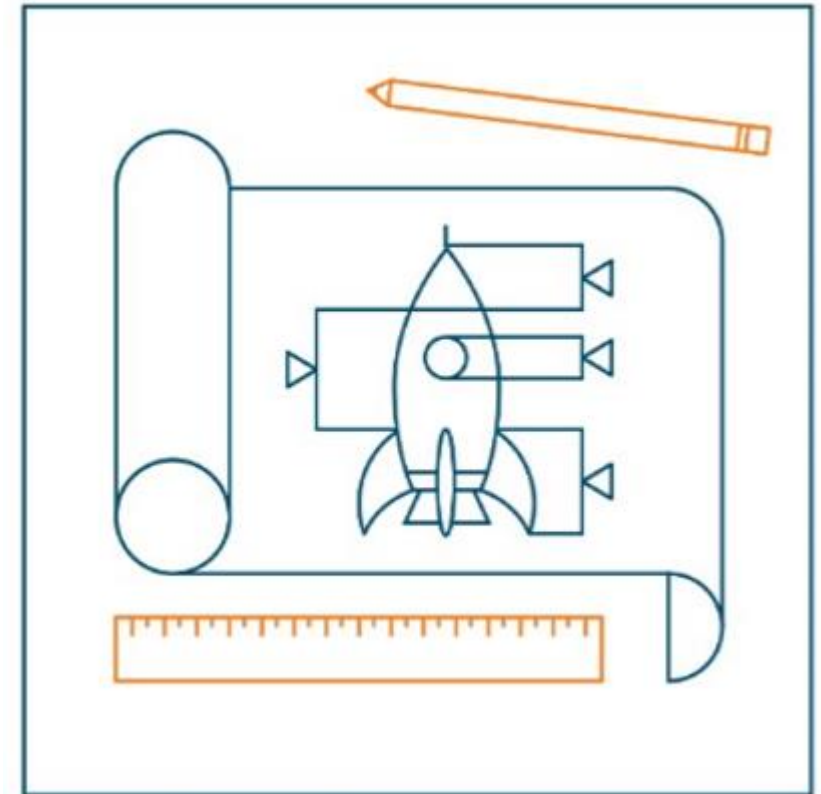
Originator: @SpareCreative

The starting point

"Small scale, innovative projects but with little systemic impact, [are] often not continued beyond pilot or funding schemes, without any scientific evaluation on outcomes, effectiveness and efficiency."
(Punie, Kampylis, & Vuorikari, 2013)

Topics of talk
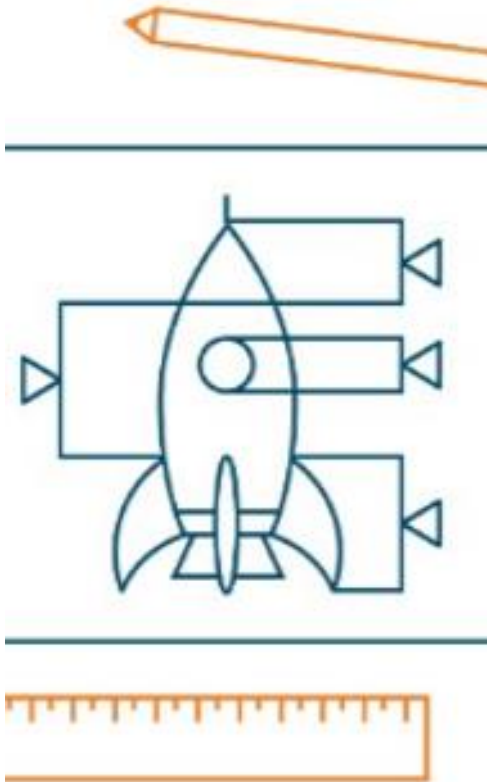
1. Open Education as context for use of Open Educational Resources
2. Policy and strategy necessary to achieve the potentials of OER and OE.
3. Formulating a clear vision for OER
4. Carrying out a gap analysis to formulate the masterplan
5. An implementation agenda that links the engagement of communities with national agendas
6. Your next steps…

Please note: This is part of a current work-in-progress. Please do not circulate on social media at this point!

The context: OER as starting point for OE - 1

"OER are teaching, learning and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions. Open licensing is built within the framework of intellectual property rights as defined by relevant international conventions to respect the authorship of work."

open textbooks	lecture notes & presentations	multimedia	audio	illustrations	animations	assignments	quizzes

(Ehlers, Schuwer, & Janssen, 2018)

Retain keep the work forever	**Reuse** use the work for your own purpose	**Revise** adapt, modify, or translate the work	**Remix** combine it with another resource to make a new work	**Redistribute** share the work with others

The context: OER as starting point for OE - 2

3 core processes

- Content development

- Delivery of learning

- Recognition of learning

content

delivery

Dimensions:
- Flexibility (digitalisation)
- Openness (inclusion)

recognition

(Orr, Weller, Farrow, 2018)
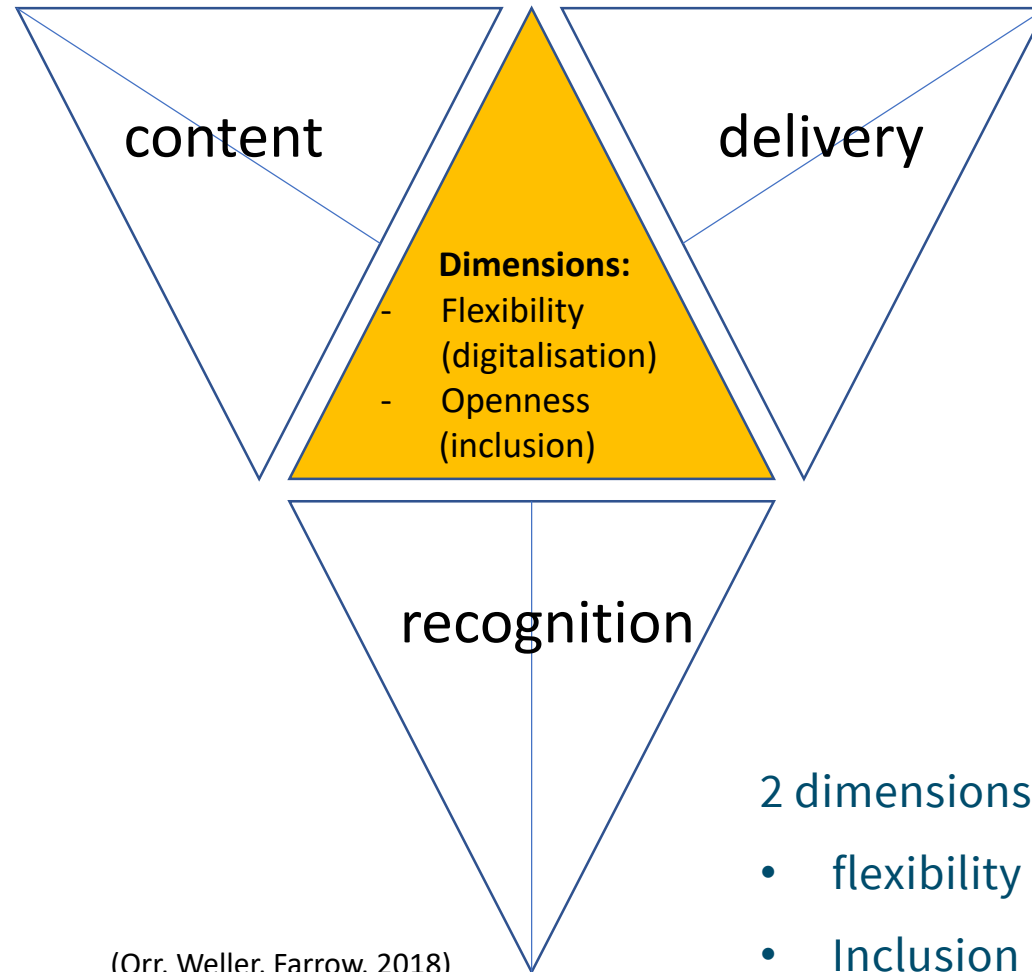
2 dimensions

- flexibility *(organizational openness)*

- Inclusion *(social openness of processes)*

OER

delivery

Dimensions:
- Flexibility (digitalisation)
- Openness (inclusion)

recognition

Open education as whole learning context

SAMR as way of describing the goal for OER
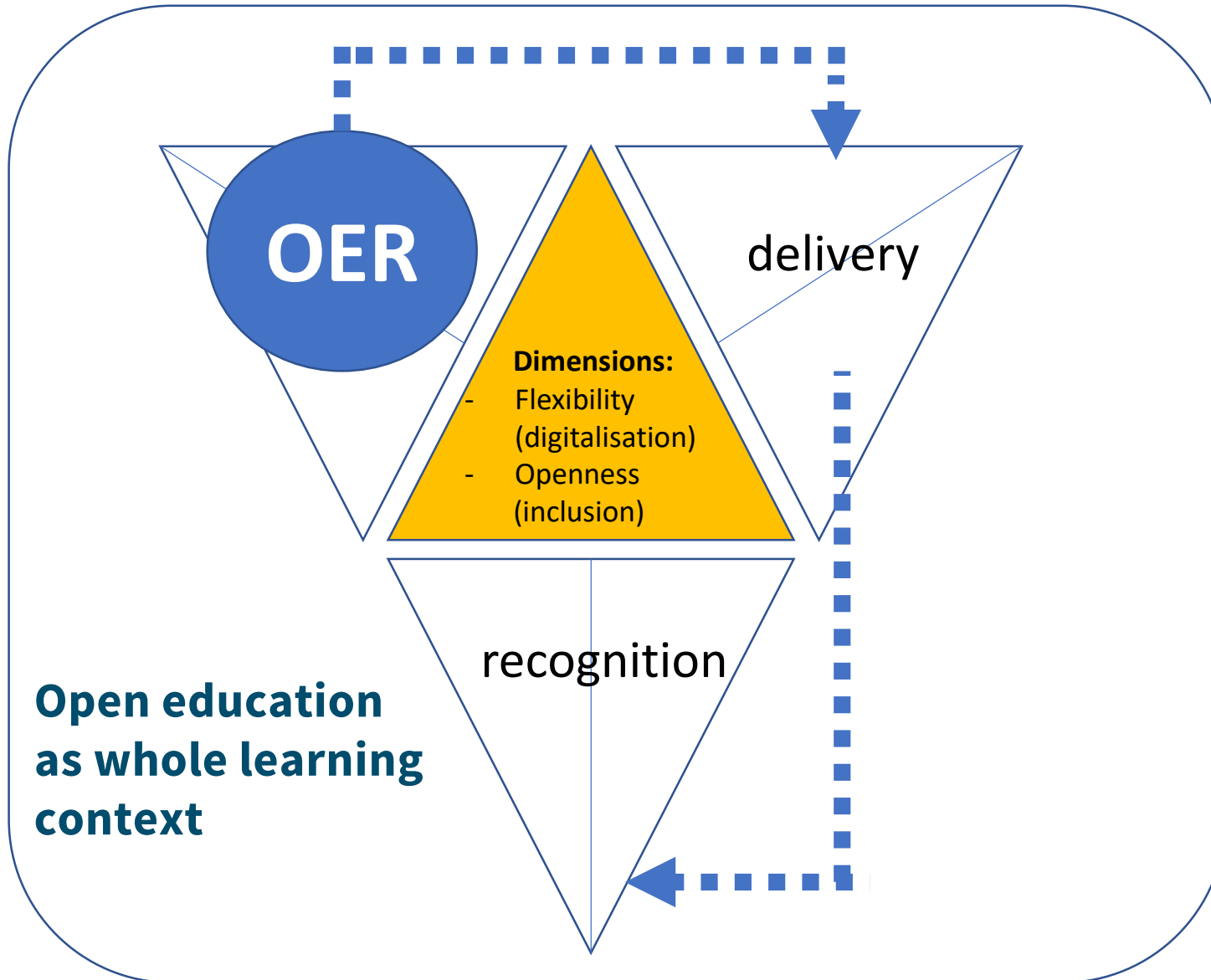
- ***Substitution***: The technology acts as a direct tool substitute, with no functional change

    Applied to OER: replaces similar learning material allowing for the same functionalities.

- ***Augmentation***: The technology acts as a direct tool substitute, with functional improvement

    Applied to OER: constitutes an improvement in terms of previous learning materials' coverage, how up-to-date it is and how accessible.

- ***Modification***: The technology allows for significant task redesign

    Applied to OER: enables a substantial learning activity redesign, e.g. encouraging more levels of interaction between teachers and learners and learners and learners compared to the previous learning material.

- ***Redefinition***: The technology allows for the creation of new tasks, previously inconceivable

    Applied to OER: facilitates new forms of learning that were previously unavailable within the previous teaching and learning configuration; redefines the pedagogical approach, e.g. with learners becoming co-producers and content integrating more authentic situations.

The need for OER policies

What is the nature of a policy?

A policy / strategy:

- sets direction

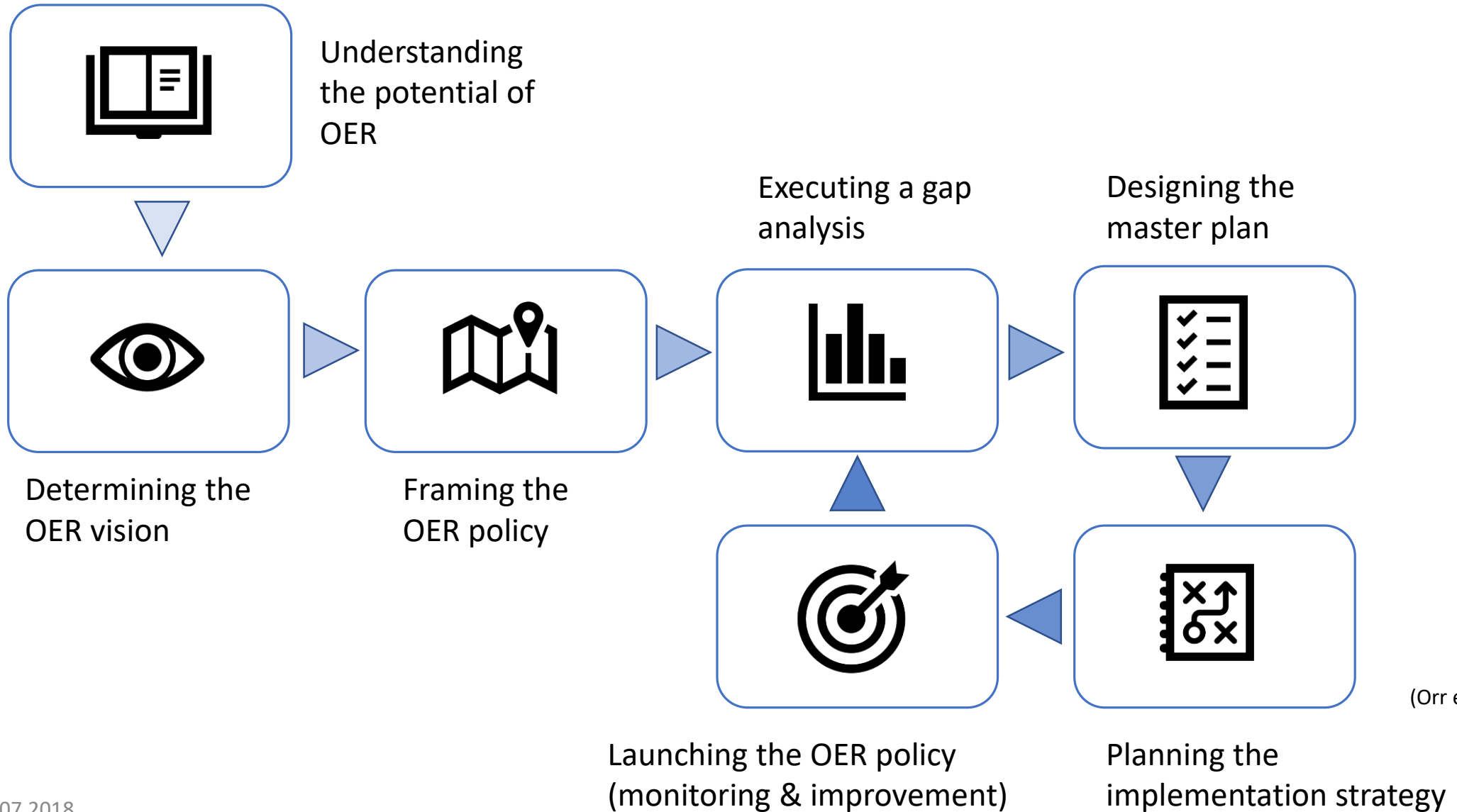- focuses efforts

- defines the organization

- provides consistency

(Mintzberg et al, 2009, 16- 18).

Overarching and comprehensive policies are necessary to take reforms to scale and to integrate them into the 'normal' system, since any new reform requires existing prioritisation, administrative routines and decision-making structures to be re-assessed and in many cases realigned to the new reform.

The 7 steps in designing an OER policy for better T & L

Understanding the potential of OER

Determining the OER vision

Framing the OER policy

Executing a gap analysis

Designing the master plan

Launching the OER policy (monitoring & improvement)

Planning the implementation strategy

(Orr et al., in press)

Where do we want to go? - Determining the OER vision

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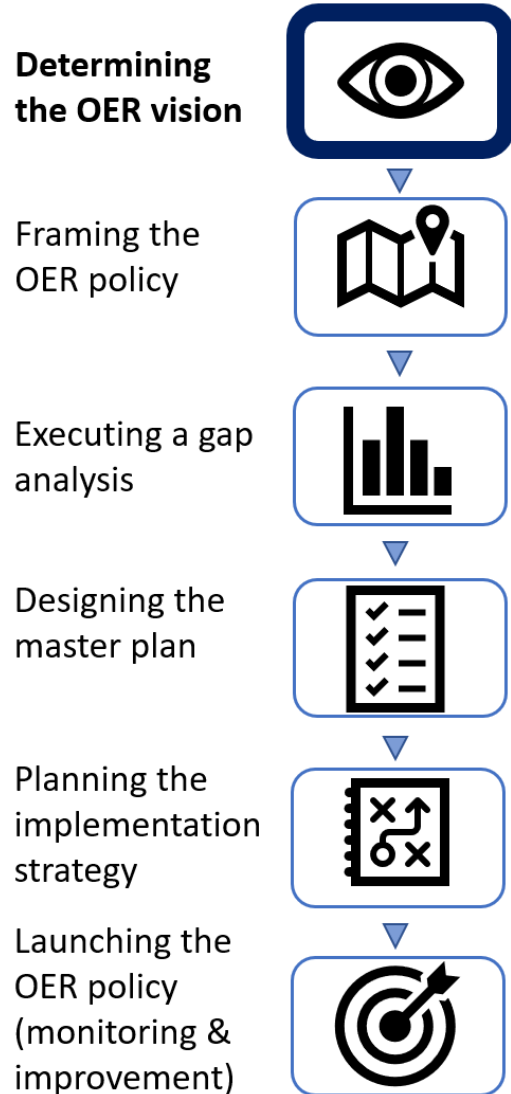
1) What is the problem that the policy hopes to solve (or contribute to solving)?
2) How will using OER in the teaching and learning setting contribute to solving this problem?
3) How much change is necessary to the educational setting in order implement this solution?
4) What is the OER policy vision?

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Problem-based approach to policy

Any agenda starts out from 2 basic considerations:

1. **What is the problem that the policy hopes to solve (or contribute to solving)?**

2. **What significance this problem is given in comparison to other problems?**

This approach recognises that there will always be competing agendas and it is important to decide which challenge is most important to solve.

A judgement on significance of any of these challenges based on the responses to 4 further questions:

1. **How drastic and urgent is solving the problem?**
2. **Which of the problems is considered to be holding the education system back most?**
3. **Is there a clear and evident way to solve this problem?**

4. **How likely is it that this solution will be accepted and can be implemented?**

Solutions to those problems considered significant in this sense should be prioritised in the policy.

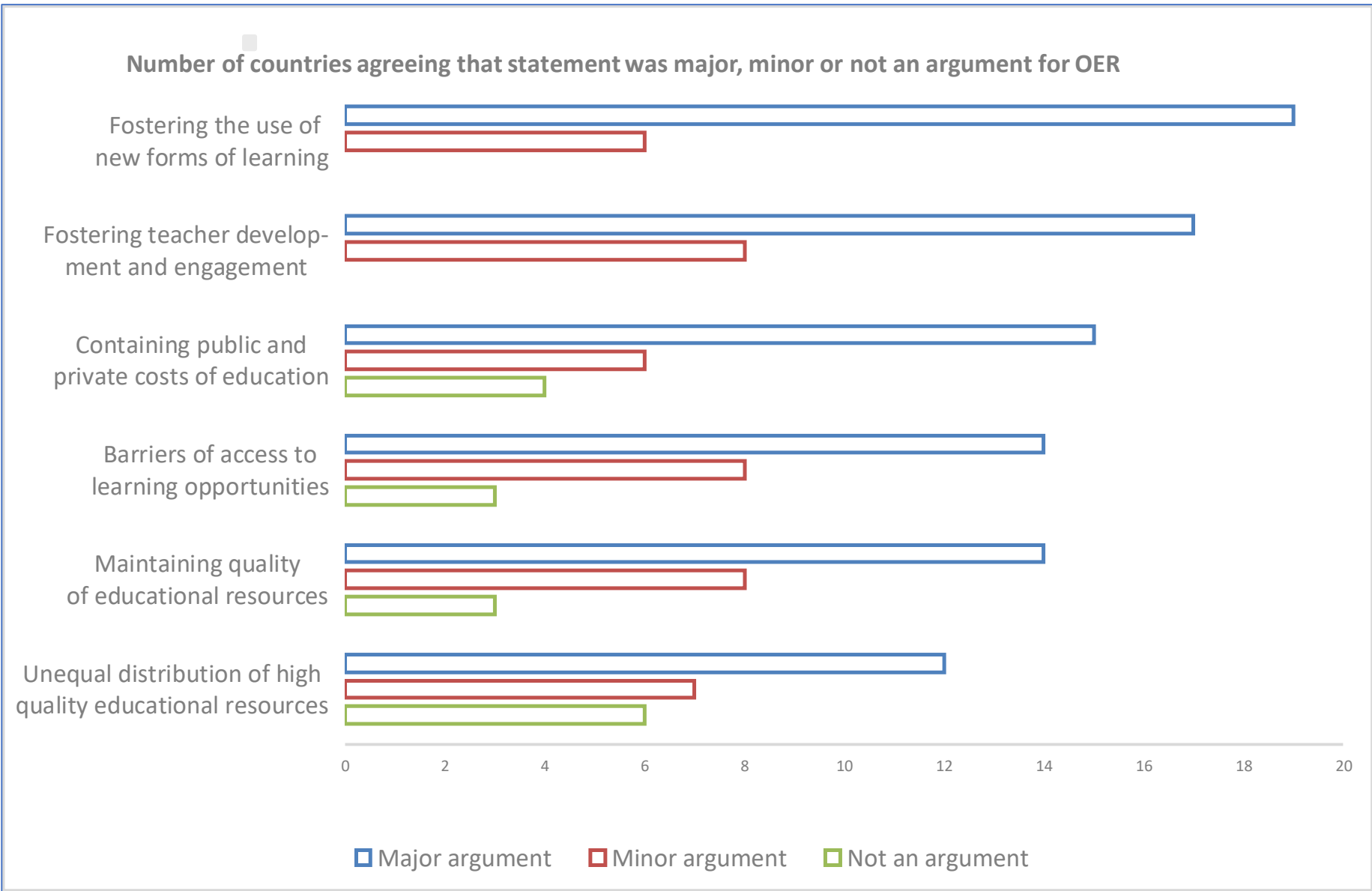# OER address 6 educational challenges for policy-makers

1. Fostering the use of new forms of learning for the 21st century
    - *Involving learners in the development of their own learning materials and the support of other learners*

2. Fostering teachers' professional development and engagement
    - *Allowing teachers to revise and tailor-make their educational resources to provide a better fit to the environment in which they are working*

3. Containing public and private cost of education
    - *Reducing costs through sharing and updating resources more cost-effectively*

OER address 6 educational challenges for policy-makers

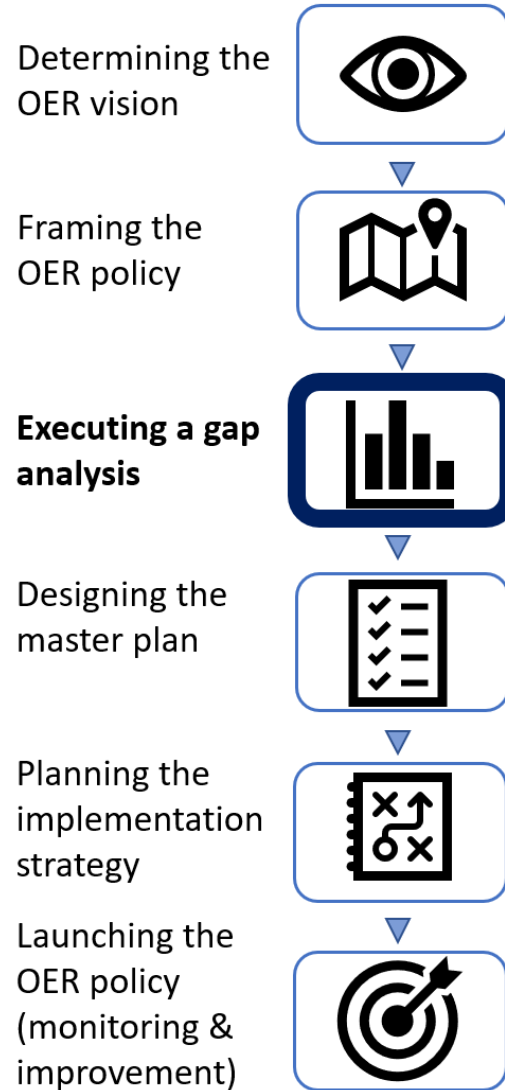4. Continually improving the quality of educational resources
    - *Keeping up-to-date with new developments and new learning theories*

5. Widening the distribution of high quality educational resources
    - *Assuring a more even distribution of high quality resources produced within institutional boundaries*

6. Reducing barriers to learning opportunities
    - *Varying place, time and pace of learning opportunities*

Survey of OECD countries on link to OER policy initiatives (2014)

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Number of countries agreeing that statement was major, minor or not an argument for OER

■ Major argument   ■ Minor argument   ■ Not an argument

(Orr et al., 2015)

Where are we now? - Executing a gap analysis

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Planning the implementation strategy
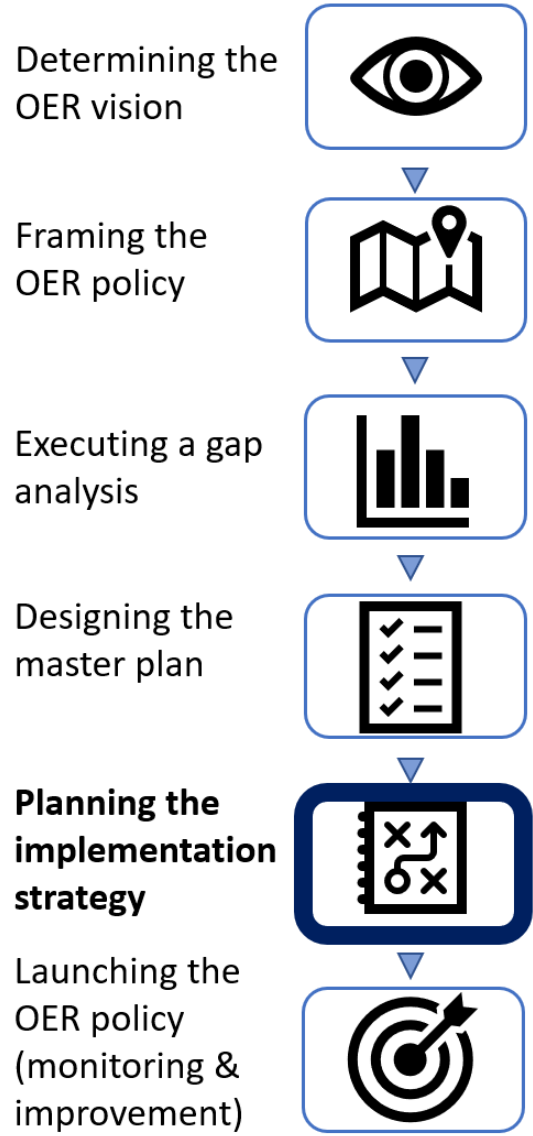
Launching the OER policy (monitoring & improvement)

1) What are the strengths and weaknesses in the current environment regarding the four dimensions of OER-readiness?
2) Which cases can you learn or draw inspiration from and why?
3) Based on your assessment, does the policy now appear too ambitious – or not ambitious enough?

Results of the gap analysis

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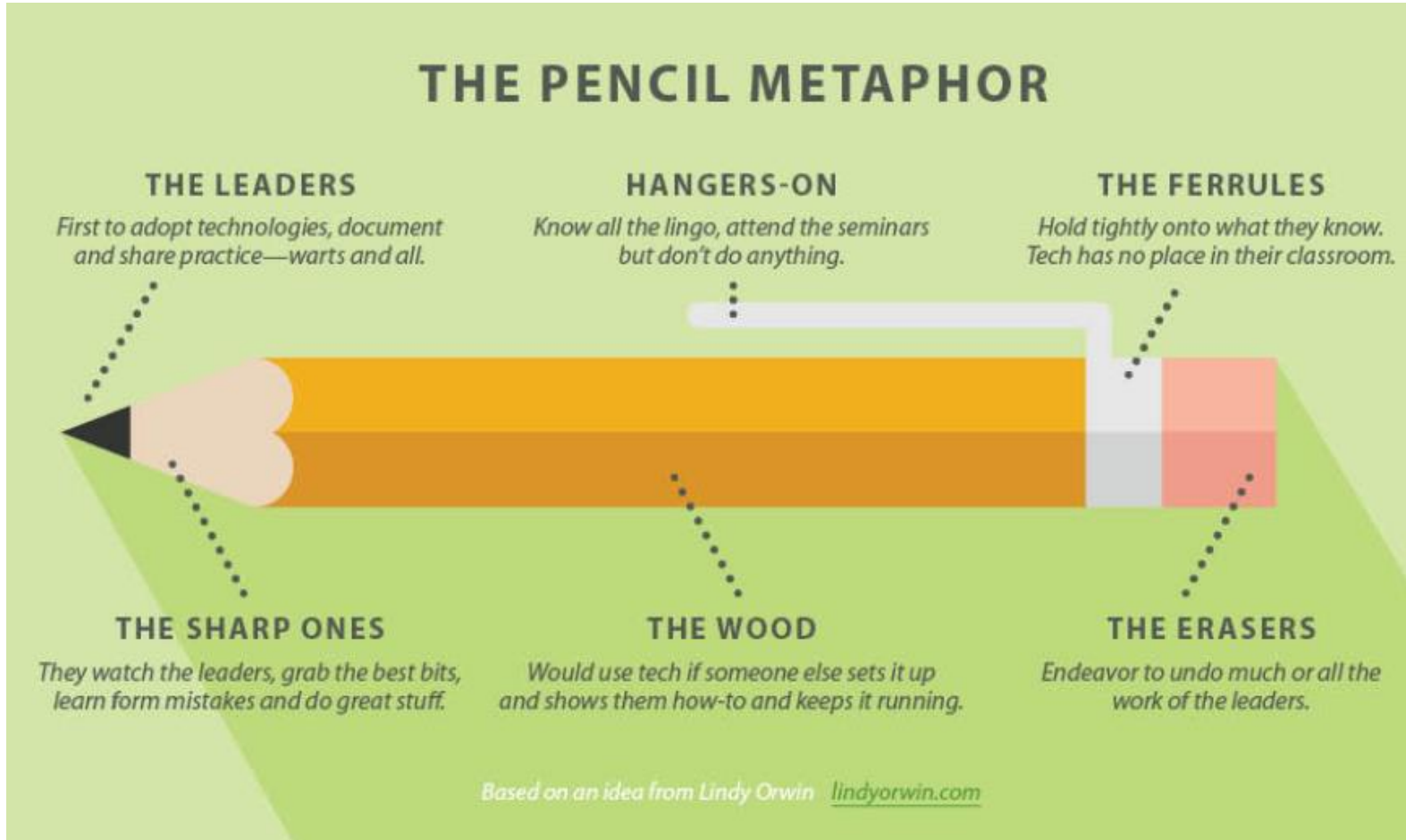| Rating	Stage	Characterisation
1	**Initial readiness**	Infrastructure adequate, some OER activities, poorly coordinated and ad hoc.
2	**Managed readiness**	Infrastructure adequate, OER activities as controlled projects and initiatives on small scale, reactive (i.e. dependent on stimulus from outside).
3	**Integrated and developed**	Infrastructure adapted to OER activities, integrated into some mainstream educational activities, well-coordinated.
4	**Controlled**	OER activities on a widescale, integrated into the mainstream, regular monitoring on effectiveness through central policy.
5	**Dynamic and self-improving**	OER activities on a widescale, integrated into the mainstream, regular monitoring on effectiveness, strong coordination between top-down and bottom-up activities, proactive and dynamic practical implementation

How? – Planning the implementation

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1) How are the activities in one building block of the masterplan linked to the other building blocks?
2) What are the costs and what is timing of each of the activities?
3) Which forms of consultation are necessary?
4) Is the resource requirement realistic or is it necessary to prioritise some activities and postpone others?

Approach to implementation - 1

Bottom-up approaches: These approaches start by supporting practitioners in the field, often through one-off funding for a limited period. The clear advantage of this approach is that it can benefit from the self-directed motivation of the initiators and their networks and is very focussed on specific contexts in the field.

Top-down approaches: A top-down approach to public policy can take into account all the success factors considered necessary for good practice, so it should afford a more systemic approach. It also has the advantage of being able to use the tools of regulation, coercion and resource-allocation to push certain activities and behaviours.

Managed approaches: A third approach will take account of the advantages and disadvantages of each approach. This attempts to ensure two things:
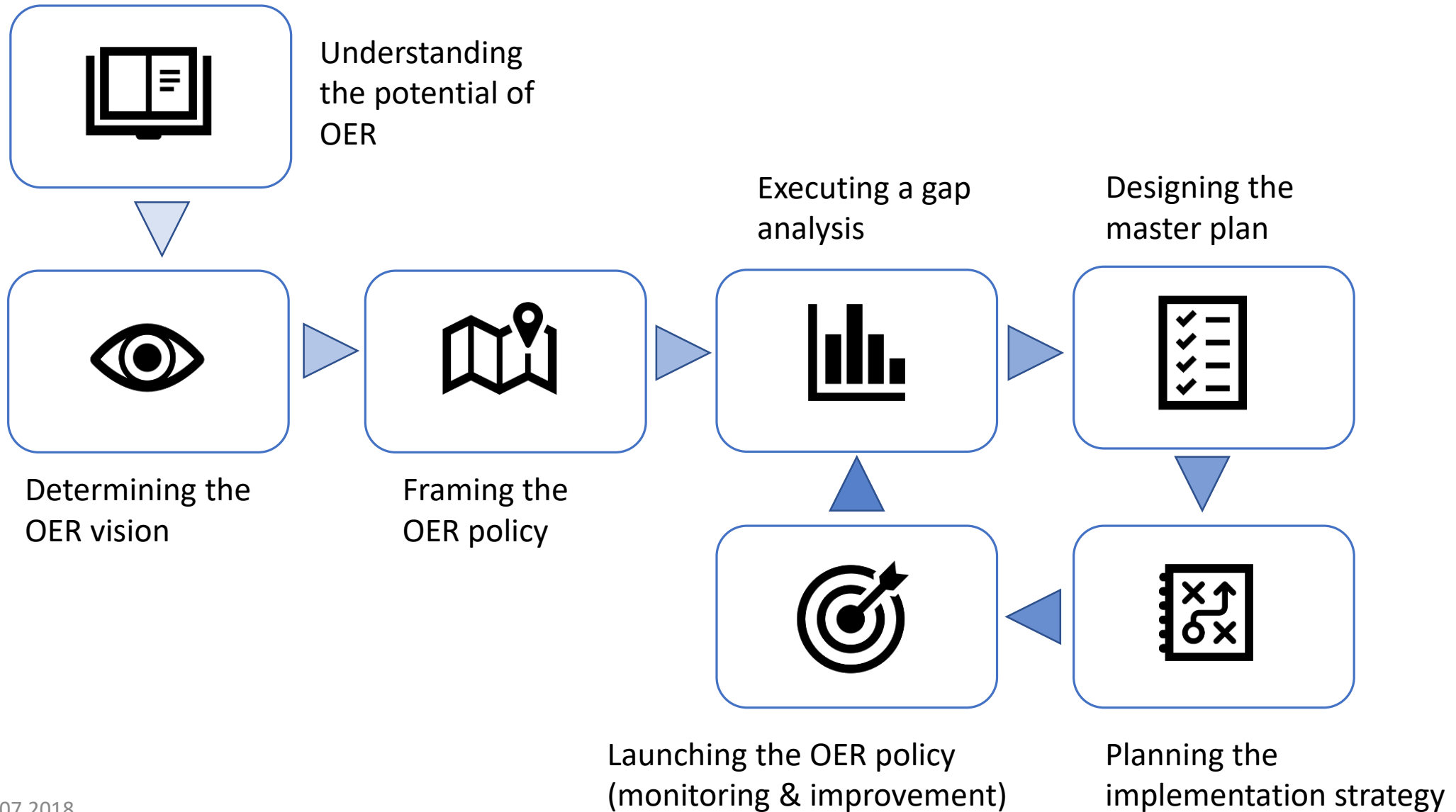
- ✓ That the process of change must be coordinated and controlled, so that all elements of the masterplan can work together to the benefit of policy success
- ✓ That the key stakeholders feel ownership for the policy implementation and are motivated and engaged to act, partly through changing their own behaviours

Approach to implementation - 2

THE PENCIL METAPHOR

THE LEADERS
First to adopt technologies, document and share practice—warts and all.

HANGERS-ON
Know all the lingo, attend the seminars but don't do anything.

THE FERRULES
Hold tightly onto what they know. Tech has no place in their classroom.

THE SHARP ONES
They watch the leaders, grab the best bits, learn form mistakes and do great stuff.

THE WOOD
Would use tech if someone else sets it up and shows them how-to and keeps it running.

THE ERASERS
Endeavor to undo much or all the work of the leaders.

Based on an idea from Lindy Orwin   lindyorwin.com

(The William and Flora Hewlett Foundation, 2015)

- What is going to be *enforced* in this building block (e.g. through a legal regulation)?
- What is going to be *enabled* in this building block (e.g. through improving the infrastructure or offering new support structures)?
- What is going to be *encouraged* in this building block (e.g. through rewarding or making certain actions more visible)?

Overview of comprehensive policy design process

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References

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Punie, Y., Kampylis, P., & Vuorikari, R. (2013). Mainstreaming ICT-enabled innovations in Education and Training : In *Are CSCL and Learning Sciences Research relevant to large-scale educational reform? A symposium at CSCL 2013, Madison, Wisconsin*. Retrieved from http://is.jrc.ec.europa.eu/pages/EAP/documents/130617CSCLY.Punie_full.pdf