JOURNEYS TO OPEN EDUCATIONAL PRACTICE: MOTIVATIONS

UKOER/SCORE Review Final Report

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

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2.1 MOTIVATIONS

Openness can be viewed as a philosophical position underlined by democratic decision-making and communal management by distributed stakeholders, rather than a centralised authority. It was established through open source software development and relates to the principles underpinning open learning, open courses and open educational resources. (UKOER/SCORE Review Interview Analysis)

Motivations to use and release Open Educational Resources (OER), and engagement with the broader notion of Open Educational Practice (OEP), reflect strategic priorities and goals of funding bodies, educators, educational institutions and communities, and external sectors concerned with knowledge creation and dissemination. These can be categorised into five broad areas[1] (Falconer et. al., 2013):

1. Building individuals' or institutions' or community's' reputation
2. Improving efficiency, cost and quality of production
3. Opening access to knowledge
4. Enhancing pedagogy through the creation and reuse of OER,
5. Building technological momentum

In reality, actual motivations of different stakeholder groups do not fall neatly into categories and are not mutually exclusive. Tensions may arise when these motivations conflict and this can impact on choices around models and approaches for OER release, or may affect use and/or re-use of OER. These tensions may also stifle changes in practice or in organisational or community cultures. The UKOER programme investigated the various motivations of different stakeholders, and their impact, from the very beginning and this study's surveys and interviews helped us to probe deeper to see if these had changed over the funded period.

Motivations can be viewed as 'perceived benefits' - ie what the stakeholder/s thought the benefits might be for themselves and others. It is worth noting that it can be very difficult to tease out what where perceived benefits at the start of a project from the actual benefits at the end of the project, because the individuals involved in the projects assimilate their understanding of these as the project progresses - it can be hard to remember what you once didn't know. The involvement of a very diverse and wide range of stakeholders in the HEFCE-funded initiatives added another layer of complexity - even within one project there were often multiple motivations (and benefits) to consider. It is also challenging to supply evidence of these, particularly the more altruistic and wide-scale benefits such as 'opening access to knowledge'. It can be useful to focus on the unanticipated benefits, because therein lie some of the most surprising impacts of the programme. The UKOER programme and SCORE work did, however provide some compelling evidence around benefits which will help to inform and engage the wider community[2].

2.1.A. MOTIVATIONS OF THE FUNDING BODY

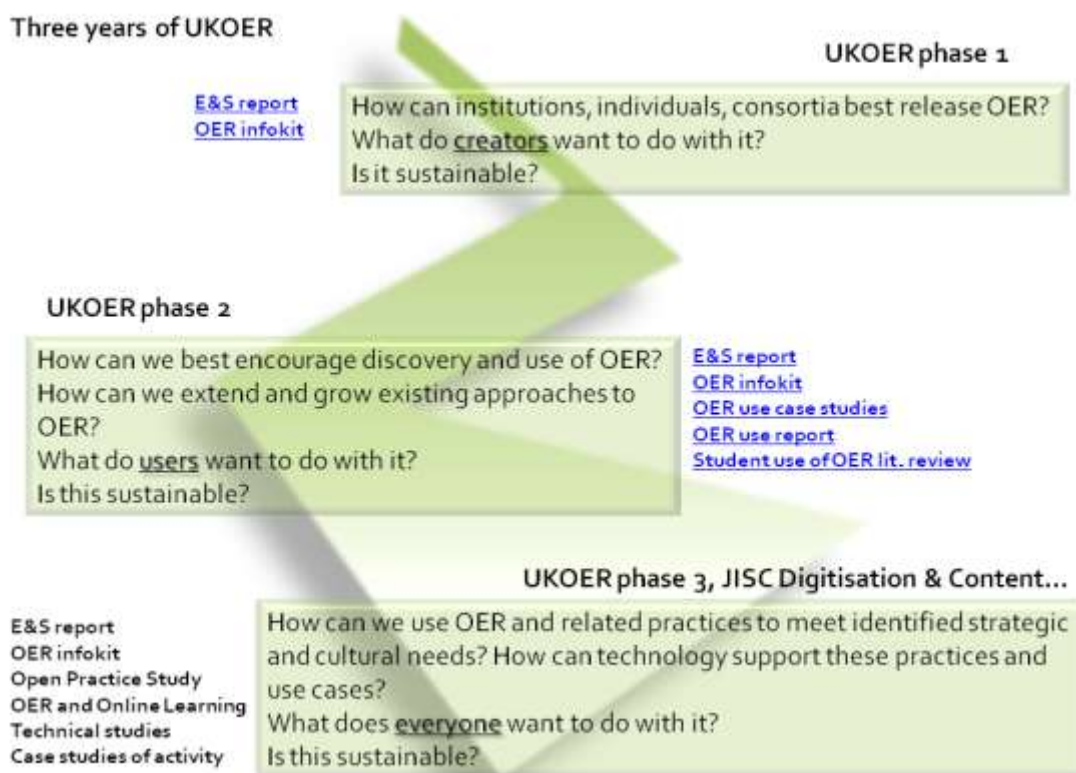The motivations for HEFCE in investing in UK OER initiatives were broadly

- to promote the sharing and reuse of learning resources by supporting the strategic development of a culture of OER release

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[1] Falconer, I, Littlejohn, A., McGill, L., and Beetham, H. (2013) 'Motives and tensions in the release of Open Educational Resources: the JISC UKOER programme' in preparation for submission to Learning, Media and Technology special issue on Critical Approaches to Open Education. Draft available at http://bit.ly/motivespaper

[2] This information has been drawn together on the Synthesis and Evaluation wiki [http://bit.ly/oerevalsynth] and the OER infoKit [http://bit.ly/oerinfokit]

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- to provide a reputational benefit to UK higher education through the promotion of high quality learning resources worldwide through the continued release of OER.

This aimed to build on previous work in the areas of digital content, repositories and sharing of learning materials. During the UKOER Programme more than 80 projects benefited from funding, many with multiple partners across a wide range of sectors. Each phase (lasting a year) built on the previous one as illustrated by the following diagram:

Three years of UKOER

UKOER phase 1

E&S report
OER infokit

How can institutions, individuals, consortia best release OER?
What do creators want to do with it?
Is it sustainable?

UKOER phase 2

How can we best encourage discovery and use of OER?
How can we extend and grow existing approaches to OER?
What do users want to do with it?
Is this sustainable?

E&S report
OER infokit
OER use case studies
OER use report
Student use of OER lit. review

UKOER phase 3, JISC Digitisation & Content...

E&S report
OER infokit
Open Practice Study
OER and Online Learning
Technical studies
Case studies of activity

How can we use OER and related practices to meet identified strategic and cultural needs? How can technology support these practices and use cases?
What does everyone want to do with it?
Is this sustainable?

source: David Kernohan, JISC Programme Manager http://followersoftheapocalyp.se/what-i-talk-about-when-i-talk-about-ukoer/

The final phase of UKOER (phase 3) call specifically highlighted strategic and cultural motivations that had emerged during earlier work through the following key thematic areas:

- Theme A : Extend OER through collaborations beyond HE (Working in partnership with organisations from another sector in order to release and/or collect OER materials that meet their identified needs.)
- Theme B: Explore OER publishing models (Collaboration with commercial publishers and/or Using a range of openly-licensed collections of materials as the basis for new resources)
- Theme C: Addressing sector challenges (Supporting emerging forms of learning and accreditation and/or Involving academics on part-time, hourly-paid contracts and/or Enabling Sustainable practice)
- Theme D: Enhancing the student experience (Resources to support university applicants and/or Drawing on student-produced materials)

Since its inception in 2009, SCORE ran alongside the UKOER programme and completed during phase 3. As one would expect, there is strong overlap in motivations for both initiatives which aimed to enhance and share collective wisdom by providing a solid evidence base around their interventions

and outcomes, through a combination of practical approaches, research and community building. The phase 3 final report provides a [cumulative table of benefits for different stakeholders](#) (developed across all three phases of UKOER). These benefits are powerful motivators and have been used throughout the programme to engage stakeholders.

As discussed in the previous section [OER journeys](#), OER release cannot be seen outside the wider political context which impacts on cultures of sharing learning resources and educational practices. For example, teaching in the Welsh medium has been the catalyst for sharing Welsh learning resources due to the small number of users/resources and less competition between institutions. Initiatives such as UKOER itself have undoubtedly driven release, and can provide an antidote to more restrictive or protectionist academic cultures. At a national level political aspects featured early in the programme as questions emerged around how far open practices challenged or supported notions of traditional university education[3]. Throughout the programme this debate has been in parallel to the changes of government and university funding regime in the UK.

2.I.B. MOTIVATIONS OF EDUCATIONAL INSTITUTIONS

One of the most compelling motivations for educational institutions to support OEP and OER release and use is to enhance the learning experience of their own students, linking these emerging practices with important strategic drivers such as widening participation, by making their content more widely available and accessible.

Student approaches to learning are usually related to disciplinary practices but the changing demographic of students is challenging teachers to reconsider traditional teaching approaches. OER are seem as being particularly relevant and important as part of the move to enhance the learning experience of remote students, whether they are distance learners, work-based students or part-time students. Whilst the need to offer a flexible curriculum for non-traditional students can stimulate interest in the use and development of OER, UKOER projects noted that on-campus students still have expectations of 24 hour access to content through the web and an increasing expectation that provision will be personalised the their specific needs. Many projects highlighted students as key drivers for institutions to engage with OER. (Phase 2 final synthesis report, 2011)

Towards the end of the UKOER programme institutions highlighted the benefits of developing new relationships with learners as they became collaborators in resource production, release and use. This provides ongoing motivation as they increasingly recognise the need to transform their relationships with students[4].

Another motivation for institutions is the perception that releasing OER will result in efficiencies and cost effectiveness, particularly when they have already invested in production of high quality learning resources. Many institutions are aware of duplication across departments - so for example several different departments may provide 'introduction to statistics' courses. Whilst teaching may need to focus on the subject context there is potential for sharing supporting resources across the institution. Moving towards open release provides an opportunity for institutions to surface such resources. Whether or not there are real efficiencies to be gained is quite complex to disentangle. We have gathered evidence of improved efficiencies through a focus on generic content that can be used across subject disciplines (such as digital literacies, research literacies, basic statistics) but also have evidence that the effort involved in engaging with and releasing OER can initially, as staff expertise is

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[3] OERs, capitalism and social totality - Richard Hall, De Montfort University develops a 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 considers the issues around exporting the Western model to other countries. http://www.richard-hall.org/2011/12/07/oer-capital-and-critical-social-theory/

[4] Jisc Infonet Relationship Management infoKit http://www.jiscinfonet.ac.uk/infokits/relationship-management/

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developing, require more resources. There is also significant evidence that openly releasing existing learning material, requiring checks around provenance, ownership and clearing Copyright for open release, is more resource intensive than releasing new materials openly. Often this resource is actually staff time so may be hidden or less apparent. This investment of time has actually resulted in increased sharing of practice and ideas across institutions, increased awareness and knowledge around Intellectual Property Rights (IPR) and new collaborations and partnerships, all of which have been recognised as important benefits. However, these may not have been original motivations. This is a strong indicator that the HEFCE funding for participating institutions furthered their understanding of the benefits that OER and OEP can bring and may impact on their continuing motivation to engage and support OEP.

One of the most significant motivators for educational institutions to engage with OER and OEP is around the marketing potential offered by increased recognition and reputational enhancement. OER can support visibility on a global scale and if coupled with open courses widens potential markets. OER are seen as a way to offer potential students a taster of the high quality learning and teaching resources and can emphasise the learning experience or accreditation as the main selling point. The potential that social technologies bring to marketing make this activity much easier and less costly than other forms of marketing.

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, it's 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, however, that the latter may be easier to release, and be more easily re-used and adapted 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 described earlier. 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.

Other motivations for institutions include:

- opportunities for new partnerships/linkages with other institutions and organisations outside the education sector at local, regional, national or even global levels
- supporting sustainability of legacy materials and collections

Despite these various motivating factors becoming more recognised through the HEFCE-funded OER initiatives it has been noted that current UK government HE policy, which encourages competition between Higher Education Institutions, mitigates against a culture of open sharing. 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 discuss this further in the section on Critical factors to support open practice.

2.i.c. MOTIVATIONS OF INDIVIDUALS

Individuals may have their own motivations for engaging with OEP or OER but they are usually also a member of at least one educational institution, probably a member of a subject or professional network or community and possibly may be connected to bodies outside the education sector. The motivations of these other agencies may conflict with the individual's motivation and can impact on the models they eventually adopt. 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 student's actually demand. This is illustrated by some of the UKOER projects reporting that students felt concerned about paying a fee and then seeing lectures being made freely available to non-payers. An interesting aspect of the '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. This kind of focus and approach is founded on a commitment to open access to knowledge and to a philosophy of collective intelligence.

Educators are often motivated to become involved in OER or OEP through working with a funded project or when engaged through project activities. A few may have been driven (or even mandated) by an institutional commitment to open practices, although very few institutions were already involved in OER before the HEFCE funding began. Many individuals who became involved in the pilot or second phases of activities went on to work through SCORE to investigate and research into this area specifically. Quite often the individuals that drove the UKOER projects were from support departments with an understanding of learning technologies and the emerging open landscape. A few projects were driven by individual academics who wanted to experiment with the notions of openness and the technologies to support that. Many individuals cite the altruistic motivation of making learning materials accessible to all learners worldwide.

It is important to note that motivations to *release* OER are often different to the motivation to *use or re-purpose* OER created by others. The final UKOER synthesis reports highlighted the key benefits for each group listed below (who may or may not be the same people). These benefits may be articulated as motivations but understanding of some of these may emerge only after the individual has some experience (so again it is sometimes difficult to tease out motivations). During all phases of UKOER and at SCORE workshops gaining motivation from academic colleagues was achieved by explaining concepts, articulating benefits and demonstrating the potential to change learning and teaching practice (awareness raising).

The OER originator can benefit from:

- student/user feedback and open peer review
- reputational benefits, recognition
- benefits (efficiency and cultural) of collaborative approaches to teaching/learning
- opportunities to work across sectors, institutions and subject disciplines
- increased digital literacies (particularly around IPR)

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- reaching a wider range of learners

Other staff/users can benefit from:

- availability of quality peer reviewed material to enhance their curriculum
- collaborative approaches to teaching/learning (CoPs)
- professional/peer-to-peer learning about the processes of OER release
- increased dialogue within their organisation or with other peers in the sector and globally
- preservation and availability of materials for endangered subjects
- open access to legacy materials (phase 3 final synthesis report)

As discussed in the previous chapter, there are challenges in identifying a desire to share as a key motivation for engaging with OER and OEP, mainly because it brings several assumptions that may not be true. The OER Impact Study[5] noted that both teachers and students make extensive use of online content, though they may not think of this as 'sharing' or 'reuse', or be able to distinguish open educational content from other types of material. Increased awareness of open content can lead to changes in sharing practice and use/re-use of learning resources, for example restricting searches to openly licensed content, looking for content via subject and institutional repositories first, or ensuring that materials released to a virtual learning environment confirm to the higher standards required for open release. From the pilot phase of UKOER we concluded that informal sharing of learning and teaching materials was common practice, though carried out through different channels by different departments and subject areas.

In phases 2 and 3 we noted that terminology around OER is not universally meaningful or recognisable and we may sometimes be asking people the wrong questions. Where staff report no engagement with OER they often describe using third party materials in their teaching. Use and reuse of OER, strictly defined as content that is openly licensed and consciously reused as such, is a small sub-set of the whole. Evidence from projects confirmed that teachers do not necessarily consider IPR aspects when using others content and do not share them afterwards. The lack of awareness of OER and IPR issues means this existing practice is under the radar and fraught with issues relating to quality - from issues around quality of resources being used, and also to the quality of the learning and teaching experience. So the HEFCE funded projects confirmed that while motivation to use OER appears to be low - in practice the use of other peoples resources is widespread.

The C-SAP Project (phase 2) expert group noted that an expectation of sharing challenged long established academic community norms about the importance of peer review and its role in academic identity.

A concern was also raised that making materials openly available might open oneself up to negative judgement from colleagues because of the perception of putting oneself forward as a self-appointed expert without adequate peer review. These views illustrate how the topic of licensing touches on sensitive issues of professional identity " (C-SAP expert group in final report, 2011)

Motivations to engage in OEP are slightly different to engaging with OER because this is fundamentally about changing traditional academic and subject discipline practices. Although some educators may make a conscious decision to adopt open practices many more may be introduced to the possibilities through specific events such as course review, adapting content for new partnerships or modes of delivery, dealing with larger student numbers, etc. There is no doubt that HEFCE funding into OER has introduced many academic practitioners to the benefits of open practice and this has happened alongside some very important shifts in the HE landscape. Increasingly academics are

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[5] OER Impact Study: research report. Liz Masterman and Joanna Wild University of Oxford, July 2011
http://www.jisc.ac.uk/media/documents/programmes/elearning/oer/JISCOERImpactStudyResearchReportv1-0.pdf

required to work with others around the world, attain a global reach in terms of students and work across sectors. By the end of the funded period there was a general acknowledgement that OEP presented opportunities for academics to publish more widely.

The concept of open educational practice emerged during the last three years and people involved in SCORE and UKOER were well placed to embrace the concept and become leaders/experts in that field. The now annual OER conferences which began in 2010 feature many individuals reporting on their experiences of UKOER and SCORE supported research. It is worth highlighting that OER13 no longer has core funding but can sustain a lively programme and attract keen interest. This is a legacy of HECFE funding that reaches well beyond the UK.

2.I.D. MOTIVATIONS OF COMMUNITIES

As discussed earlier people often cite increased access for learners and sharing amongst educators as significant motivations for releasing OER. Our UKOER community survey in July 2012 also found these two featuring highly despite the fact that there is actually very little evidence that learners are using the OER or educators are in fact sharing (and using/repurposing) each others' OER. The first two phases of UKOER had significant involvement of subject communities and this was felt to be most likely to have really supported this kind of sharing.

The degree of sharing would appear to be influenced by how proactive different communities are, and the perceived quality of the OER available within the collective. Subject area also influences openness, as does the extent of collaboration (e.g. international collaborations can expose communities to different norms, values and practices). Some subject communities are already sharing teaching resources, particularly around specific sub-disciplines and topics. Norms and values may bind more closely at this level than the whole subject or whole programme. The research culture of a topic/discipline area and the educational culture of a teaching team may be relevant to how openness is regarded.

Sharing practice through a range of open technologies emerged as important as sharing resources, and is having an impact on the way subjects are being studied and taught. Considerations of OER use cannot be divorced from these wider changes to disciplinary knowledge practices. Social sciences subjects, for example, are being changed in radical ways by the availability of public social and research data online as well as the rise of new social/digital practices. Openness to ideas, recognition of contextual differences, negotiation of meanings and co-creation of materials were important to subject community led projects just as they are to learning and teaching in those subject areas.

Having a culture of sharing at community level was a useful background within which to introduce the notion of open release of resources. UKOER projects employed a number of techniques to raise the profile of OER within their disciplines. All projects provided a focus for developing a community of academics around OER release and reuse, drawing them in through surveys, focus groups, workshops, blog and wiki discussions. However it is interesting to note that within such tightly knit communities there can be little motivation (and even reluctance) to be open in a wider context outside that community. This may be supported by technology choices requiring authentication - which might provide a 'safe' and trusted space for the community members to share their practice and resources but excludes others outside that community. Trust, unsurprisingly, emerged as a key factor in sharing and communities of practice can provide the trusted space for new or wary practitioners to test out degrees of openness (staged steps to openness). UKOER project funding provided opportunities to reflect on how learning and teaching cultures are changing, and what role (if any) OER play within those trends

In many ways this is a classic example of the problems of dealing with tacit knowledge; how can we represent and share such knowledge and share it? It is, arguably, this situated, embedded, tacit and 'craft' nature of teaching in mainstream art and design that needs to be comprehended in order to both understand and improve it. By engaging with OER creation and sharing, especially with a combination of rich media and practice based accounts as exemplified in Process.Arts we effectively open a door into this hitherto secret garden of art and design educational practice. (ALTO UKOER phase 2 project, 2011)

Moving from traditional discipline-specific pedagogic approaches to open approaches requires significant change and many practitioners need support to do this (we discuss this in more depth in the chapter on Critical-factors to support open practice). Whilst communities can help practitioners to change they can also be founded on established rules, roles and conventions that challenge change. This presents some very real tensions in motivations and actual practices.

In summary, while communities may encourage first steps into open practices, they sometimes seem antithetical to the basic philosophy of open release of resources. We found a contradiction between the aim of the UKOER programme to openly release OER and limited practices within some communities, resulting in release of OER within bounded communities. These contradictions present major barriers to successful OER release. source: E&S Team blog post, March 11th 2013 OEP and bounded communities

Our Interviews in September 2012 found that a strong motivator for changing practice was the idea of working with like-minded people who work within the principles of openness, which perhaps reflects the notion of a broader community based on OER and OEP than smaller bounded communities. The CSAP project in phase 2 of UKOER reported that there was a substantial gap between the emerging OER community and academics, whilst other projects noted differences in subject disciplines as being more significant. A challenge as we reach the end of the funded period is to consider how we might engage and motivate those outside the emerging UKOER community.

Some subject disciplines and communities reported that motivations to be open may compete with commercial practices. Art and design was highlighted as being a subject where this was emerging yet the COMC UKOER project's open courses at Coventry University challenged this notion and saw open practice as liberating for both learning and teaching, and the professional photography field.

Phases 1 and 2 of UKOER were supported, and sometimes led by, HE Academy Subject Centres which provided trusted subject communities with technologies and approaches that already reflected the needs of their discipline. This also is likely to have an impact of the motivations of project members, which may have reflected the visions and strategies of these bodies.

2.I.E. MOTIVATIONS OF HEFCE-FUNDED INITIATIVES

Our UKOER community survey indicated a range of motivations for being involved in UKOER and/or SCORE initiatives. However, the predominant response (78%) was that of being "experimental' - to investigate the potential of OER". This is not surprising given HEFCE funding aimed to investigate the potential of OER release and find out how this impacts on existing practice. However, coupled with other motivations such as building on previous OER work by individuals, departments & institutions, and availability of funding, the finding is significant since it recognises the value of HEFCE funding in this area. It is challenging for institutions to be experimental in this area without the support that funding can bring.
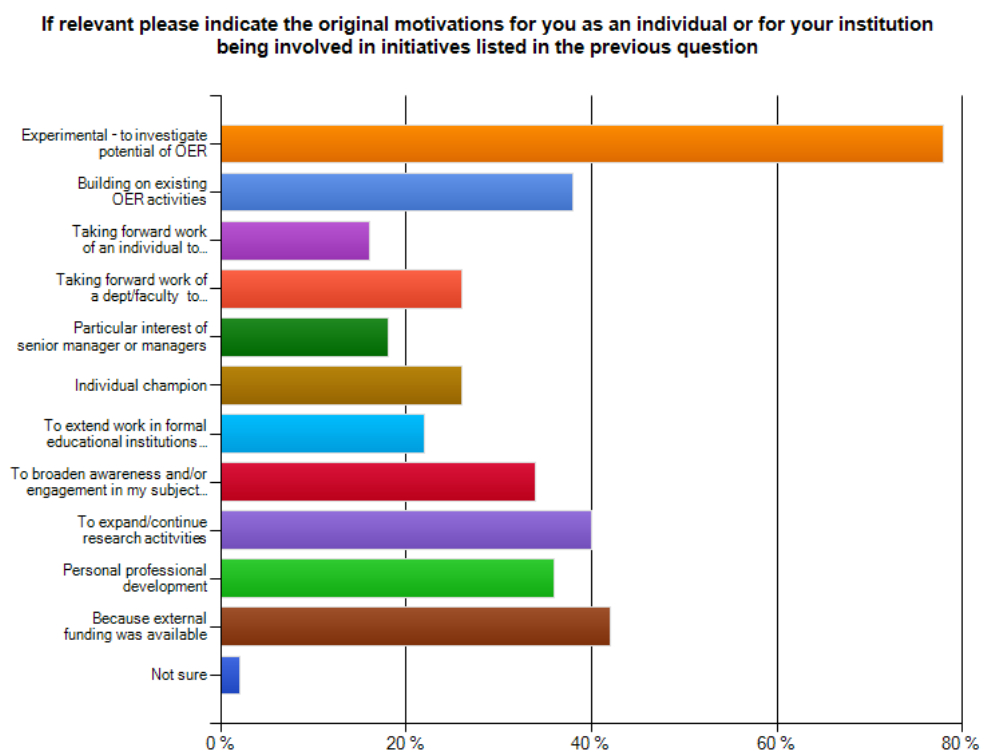
If relevant please indicate the original motivations for you as an individual or for your institution being involved in initiatives listed in the previous question

Fig 1. Responses from detailed survey of UKOER and SCORE initiatives around motivations for being involved

Many UKOER projects offered students opportunities to be involved in project activities (including testing, evaluation, and contributing to development of OER), sometimes providing financial reward as motivation. Financial reward was also important to engage some practitioner groups, such as part-time lecturers who had limited time on daily duties to become involved. The benefits of being involved for students were wide ranging, including work experience opportunities, enhanced digital literacies, producing materials and opportunities to feed into curriculum development and delivery. Students revealed increasing awareness of the potential of OEP and appeared to embrace the opportunity to engage in a variety of different ways. However some concerns still persist amongst both academics and students that fee paying students may not be happy for their institutions to freely 'give away' learning materials.

2.I.F. DEMAND FOR OER

At a fundamental level motivation to release OER should reflect some 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 previous chapter. 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 the sector. 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, discussed earlier.

Identifying demand for OER and reuse has been one method of 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 would be influenced by stakeholder motivations, expectations, needs and the perceived benefits. Throughout the UKOER programme demand has been measured by

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tracking mechanisms around OER themselves and through engagement activities with stakeholder groups. Our wider sector poll identified as significant a lack of awareness around the potential of OER and their benefits by both individuals and institutions, and engagement activities which articulate the benefits have featured widely, both within specific institutions and stakeholder groups or with the wider UK HE community.

Looking back at the 5 key motivation categories introduced at the start of this section, the fourth category, enhancing pedagogy is underpinned by philosophical or altruistic positions rather than business model approaches. It emphasises the value of the OER development process, rather than the value of the content produced. The HEFCE-funded OER initiatives considered in this report have 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.

ON THE WIKI: BIT.LY/HEFCE-REVIEW-MOTIVATIONS
BACK TO: OER JOURNEYS
FORWARD TO: MODELS

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