Journeys to Open Educational Practice: Recommendations

UKOER/SCORE Review Final Report

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

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CONTENTS FOR RECOMMENDATIONS SECTION

5. RECOMMENDATIONS

5.I FUTURE NATIONAL SUPPORT FOR OER

The UK OER programme has had a demonstrable impact on the volume of OER in development, management and use in the UK higher education sector and on the capacity of UK Universities to participate in OER and in related OEP such as open scholarship and the development of open courses.

1. Key to securing these advantages to UK HE has been the national **support and advisory offer** provided via SCORE and JISC services including Jorum, TechDis, JISC Legal, JISC CETIS and web2rights). These services should continue to be provided, albeit possibly in a more distributed manner. Evaluation data such as we offer in this report should be used to enhance service uptake and value.
2. Equally relevant to the impact of UK OER funding has been the development of a loosely affiliated **community of practice and expertise**. Now that funded programmes and projects are at an end, new opportunities should be explored for individuals to maintain conversations and share practice across institutional and role boundaries, for example through face-to-face events, webinars, a facilitated online community.
3. Outcomes from UK OER funding including this report, the SCORE case studies, the OER infokit and the many OER released through the programme should continue to be **disseminated to the sector**, for example through OER ambassadors and mentors.
4. Use and enhancement of **UK OER resources should be promoted** via other funding initiatives, for example Changing the Learning Landscape, the JISC Digitisation programme, JISC Developing Digital Literacies programme, HEFCE Catalyst Fund, OU FutureLearn.
5. HEFCE should continue to work with publishers, Higher Education experts and Government to **simplify copyright issues** for academia.
6. The potential for longer-term **partnerships with commercial publishers** should be explored e.g. through funding for pilot projects to trial different models of collaboration. Similarly, HEFCE should support the open licensing of existing resources such as the Times Education Supplement and TeachFind.
7. The **SCORE model of support** (fellowships, residential courses, workshops) should be considered as a proven means of building capacity in other priority areas for the UK HE community.
8. Future investment in UK OER should prioritise:

   - involving **not-yet-engaged** subject areas and institutions, for example through OER ambassadors, seed funding for mini-projects
   - sustainability strategies for **strategically important and vulnerable subjects**, for example in the humanities and social sciences
   - **foresight** work and building resilience to emerging forces in the global marketplace for education, for example international consortia providing low-cost learning via open courses and OER
   - **raising awareness** of OER and making OER **more visible** to potential users
   - the development of robust **economic/cost models** for OER and OEP
   - **extending the scope and reach of UK OER** beyond UK HE (see our [specific recommendations](#) on this topic)

5.II OER RESEARCH

1. OER is a growing research field within educational studies. HEFCE and its partner organisations could influence this research agenda towards the following key areas.
2. Research into the role of OER in raising awareness of available HE opportunities: for example to understand whether/how access to OER enables better decision-making on the part of (prospective) students, and whether/how release of OER translates into enhanced enrolments for departments and institutions.

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3. Research into the role of OER in informal and lifelong learning: for example to understand who typically accesses OER for learning, with what prior experience of learning, and with what impact on their subsequent educational journeys.
4. Research into the digital literacies required by learners to engage successfully in OER and associated forms of open learning.
5. Research into actual participation in OER and OEP by different groups of teachers and learners, with the aim of identifying barriers to engagement and any systemic sources of inequity.
6. Further research (building on the OER Impact Study) into academic (re)use of OER: for example to understand which academics (re)use, why and how they reuse, and what benefits/impacts are felt.
7. Further research into the links between OER and OEP in professional (including academic) practice.
8. Practice-based research into educational design for OER including issues of accessibility, educational outcome, and the relationship between open content and open contexts (such as open courses).

Our evaluation work has highlighted how OER release can provide reliable evidence of research impact. The interface between OER and open scholarship should continue to be explored.

Open outputs should respect all three OER freedoms (technical, legal and educational). Further recommendations are given on each of these areas.

5.iii TECHNICAL/DESIGN

1. OER materials should be released as easily reusable assets and not just as PDF or web pages. Producers should consider publishing multiple formats, and/or disaggregated assets alongside aggregated sequences.
2. The community would benefit from very easy-to-use tools to facilitate customisation, repurposing and mash-up of existing materials.
3. Enable feeds into Jorum if other repositories and publishing mechanisms are preferred. Ensure OER released onto Jorum are available in multiple formats (at least a .txt file containing a transcript, content or assessment questions that can be reused)
4. Further explore the use of open technologies (open in terms of software, standards, accreditation, and low thresholds in terms of user ability and access to devices/networks) to ensure genuinely open educational opportunities via OER
5. Consolidate expertise in OER discovery and identification, and consider the options of a central (metadata) directory. After 3 years of UK OER projects it is still surprisingly difficult to find and expose reusable resources.
6. Improve metadata authoring – for example through clear guidelines, varieties of automated support – to aid discovery and identification of OER by standard search engines
7. Investigate the use of metadata and paradata arising from OER for audit and other purposes (e.g., from CORE-SET, '[to give] OER a greater credibility and a richer context').
8. Consolidate expertise in OER tracking and analytics and provide a limited number of best practice options
9. Further technical developments likely to be of value:

    - HTML5 authoring tools for the Open CourseBook format
    - open eBooks with a range of different formats, options for display and functionality
    - OER for mobile devices
    - integration of the XCRI standard into authoring tools
    - automatic licence generation from personal/organisational data
    - automatic recording and responding to permission requests

5.IV LEGAL/LICENSING

1. Non-restrictive open licensing of educational materials and resource components is essential if repurposing/re-use are to become established practices.
2. Encourage release of OER without the non-commercial (NC) clause, which can discourage re-use and re-purposing. Where the most open CC license is not considered acceptable, encourage dual licensing.
3. Review and where possible consolidate legal resources for OER e.g. copyright related training courses and materials offered by JISC Media, JISC Legal, Web2Rights, BUFVC, NetSkills and other national bodies.
4. Encourage institutions to take a more positive approach to licensing and copyright issues, focusing on the organisational benefits of open access repositories.
5. Continue work on standardising licence information in metadata. Best practice standards on the display of attribution and licence information on OER websites would also be helpful.
6. Build on the work of the PublishOER project in partnership with the Digital Copyright Exchange, with a view to improving;

    - information and copyright education
    - registries of rights
    - a rights marketplace
    - the range of licensing solutions suitable for different contexts

7. Consider a nationally-negotiated solution to the problems encountered by non-university colleges wanting to publish HE materials to iTunesU
8. Continue to work closely with publishers to establish content permissions processes for OER and to better understand the benefits and barriers.

5.V EDUCATIONAL

1. Consider OER as part of the wider field of new academic practices (see our Briefing on Open Educational Practices)
2. Open practices can be introduced in the context of other professional development and training opportunities, and this is often more successful than offering workshops on OER/OEP PER SE.
3. Any discussion of OER/OEP should give educators room to explore changes in pedagogical practice and relationships, for example by introducing the ideas behind open, critical and connectivist approaches to teaching/learning and by considering the different needs of open learners.
4. Provide guidance to academic staff in their dealings with publishers. For example, many publishers allow the release of some part – and/or an early version – of a published textbook as an open resource.
5. Academic teaching staff may need to develop new skills such as content design and curation, and/or to work alongside other professionals with a range of expertise. Institutions will need to give thought to where this expertise will reside and to support the development of professional roles.
6. Openness in academic practice is not an all-or-nothing issue. Work towards greater openness by encouraging 'intermediate' practices such as the use of open source software in scholarship, incorporating social media into teaching, and developing accessible materials for closed environments such as a VLE.
7. Involve part-time tutors and graduate teaching assistants in open content initiatives: they are often interested in building their reputation through open practices, and may also be more receptive to innovation.
8. Work with educators must be sensitive to sector differences. For example:

    - In the schools sector a culture of sharing in peer networks largely exists already. OER work may more usefully focus on ways of safely accessing open materials and services in curriculum settings.

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- The new ICT curriculum provides an important opportunity to engage school teachers with open content and open software. High quality open content in STEM subjects (e.g. animations) is also in demand.
- In FE there is less of a culture of content creation than in HE, and staff may need specialised support for developing or adapting content in digital media.
- In HE staff may be more focused on opportunities to disseminate their scholarship and to enhance their digital reputation. A focus on open publishing can lead on to more open teaching practices.

9. Involving students as co-designers of OER results in resources that are highly relevant to the curriculum, with a focus on usability. Students respond positively to being engaged in this way, and there is evidence of better reuse.
10. Rather than always releasing established content as OER, consider using OER release or the use of content in open courses as a way of testing relevance and value, and building a business case for new courses.

5.vi Organisational

1. Open access requires a coherent approach which aligns the management of open resources with other institutional strategies and priorities.
2. The management and curation of research outputs, organisational data and learning resources should all be considered. There are efficiencies in addressing the technical, legal and strategic/educational implications of these data forms in an integrated way.
3. Alongside a clear strategic steer, most institutions will require a long-term, bottom-up approach, embedded in departments, which supports interested staff and students to develop and use OER for particular curriculum goals.
4. Institutions should actively consider how they are developing expertise in open practices, in order to meet the challenges of a radically changed educational landscape. Investment in new roles may be difficult in the current financial climate, but CPD for existing staff has proven benefits.
5. Restrictive policies on access and download are denying students valuable resources for learning that it would be prohibitively expensive for most colleges to develop for themselves. Whilst acknowledging the need for safeguarding of students online, it is recommended that institutions find ways of providing access to OER, and give students positive strategies for finding and using digital materials to support their studies.
6. Long-term, the most effective and sustainable approach is for processes of OER production to be integrated into existing activities of teaching and course design. However, this requires commitment from all teaching staff. Aiming to release OER and/or deliver open learning from just one course in each department is a realistic milestone.
7. With awareness being so unevenly distributed, it is important that OER champions have opportunities to share ideas and support one another across departmental boundaries. ñ Involving external agencies – partner colleges, publishers, employers, and professional bodies – can provide significant benefits, for example access to real-world materials for learning, assurance that OER produced by the institution have ready uptake and application, and better partnerships. See also our specific recommendations on working with publishers.

5.vii Working with publishers

PublishOER recommended:

1. Implement and disseminate policy principles for use of third party published works in OER
2. Undertake tests of embedding third party works in collaboration with publishers to include a wider range of disciplines and formats
3. Exemplars are developed to illustrate embedding published works in OER
4. Publishers review sales of existing works with a view to identifying any with low volume sales but that were still academically current (infrequent in some disciplines such as health and computing) that could be used as a basis for testing with OER

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5. Publishers consider including unique identification of elements of published works (anticipating a scan-and-use future), such as QR codes for interfacing with APIs

6. Authors consider making parts or sections of their creative works permanently available as OER

7. Publishers consider addressing the potential use of works in OER with authors at the time of contracting book content (licence it at the point of commissioning)

8. Permissions-request technologies are piloted with available published content, such as current open access journal content, and broadened to include subjects other than veterinary medicine

9. That the JISC Collections CASPER and RePRODUCE tools are updated to include the policy findings (JISC Collections 2010a; 2010b)

10. Consider the use of MOOCs or (tiny)OOCs with, for example, widening participation, to explore shared (HE-publisher) provision for new audiences

11. A combination of the RightsLink CCC (discussed in WP5: Policy, licences and procedures on page 21 above) and Clinical Key/ExpertConsult could be a way forward for Elsevier to develop a permissions system to lower transaction costs, but they would still have the burden of adding metadata about the licence terms of elements of a published work

12. Continue to work closely HE with publishers to increase the contact with end users thus further strengthen relationships between HE and private sector

13. The publishers networks (such as the STM, PSP and Publishers Associations); JISC 'PALS' and other organisations such as LACA (2012) should be approached with a view to widening participation in the pilot/demonstrator work

14. The CLA should be consulted about embedding published works in OER as part of the dissemination activities

5.VIII UK OER BEYOND UK HE

1. Mechanisms should be sought to widen the scope and scale of OER development and (re)use to a greater range of agencies from the private, public and charity sectors.

2. The reputational benefits of OER release, as proven in UK HE, should be promoted to other organisations in the private, public and charity sectors with potentially valuable educational materials.

3. Agencies that operate outside of HE should be encouraged to be strategic in their choice of existing content for OER release – either that which promotes the brand core business of the organisation; or that which may be of direct relevance to academia (and in some instances may even be rarely used by corporate clients and customers).

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