'OPEN, READY AND AGILE': DEVELOPING A COMMUNICATIONS STRATEGY FOR THE RESEARCH ON OPEN EDUCATIONAL RESOURCES FOR DEVELOPMENT (ROER4D) IN THE GLOBAL SOUTH

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'**Open, ready and agile': Developing a communications strategy for the Research on Open Educational Resources for development (ROER4D) in the Global South project.**

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Abstract

One of the key objectives of the ROER4D project is to communicate research. Funded by the International Development Research Centre (IDRC), the Open Society Foundation (OSF) and the Department for International Development (DFID), the Research on Open Educational Resources for Development (ROER4D) project was launched in August 2013 with the intention of undertaking empirical research to better understand the use and impact of OER in countries in the Global South. With 8 research projects currently underway or about to start in 16 countries located across 18 time zones and undertaken by 97 researchers and research assistants who speak at least 14 different languages the communications function of the project is particularly significant and challenging.

Named as a specific objective to support the overall objective, the research communications function of the ROER4D project is overseen by a Communications Advisor (the author) who supports the PI and other members of the central team to conceptualise and deliver on the projects' communications activities. Part of the process, which is ongoing, is to develop and finalise a formal communication strategy with support and mentoring from an IDRC-funded programme - the Developing Capacity in Evaluation and Communication Capacity in Information Society networks project - based in Ottawa, Canada. This paper will chart the experience and development of communications activities and research communications activities for a major OER research project in the global South.

This paper will first offer a short overview of the field of research communications in order to give context and background to some of the debates and concepts about research communications with some attention given to the specific field of development research communications. Following this, the paper will describe the development of the research communication strategy for ROER4D, seen through three concepts or lenses: **readiness, agility** and **openness**. This paper considers what these concepts have to offer research communications and a fuller explanation of each concept will be offered along with its applicability to the ROER4D research communications strategy. Some tentative suggestions will be offered as to these concepts' usefulness to other OER research programmes' research communications as well as caveats and constraints.

Keywords

research communications; communications; development research communications; open research; open educational resources; Global South, agile, ready, readiness, South Africa

Introduction

One of the key objectives of the ROER4D project is to communicate research. Funded by the International Development Research Centre (IDRC), the Open Society Foundation (OSF) and the Department for International Development (DFID), the Research on Open Educational Resources for Development (ROER4D) project was launched in August 2013 with the intention of undertaking empirical research to better understand the use and impact of OER in countries in the Global South. With 8 research projects currently underway or about to start in 16 countries located across 18 time zones and undertaken by 97 researchers and research assistants who speak at least 14 different languages the communications function of the project is particularly significant and challenging. Each is headed by a research lead within the country or region to which the sub-project refers. These sub-projects will address specific objectives of the overall project, using methodologies appropriate to the subsidiary questions they will be interrogating.

The project, which is co-hosted at the University of Cape Town and Wawasan Open University and led by Principal Investigator, Associate Professor Cheryl Hodgkinson-Williams has a key development objective: to improve educational policy, practice, and research in developing countries by better understanding the adoption and impact of OER. In order to address this objective, the specific objectives of the programme are to:

1. Build an empirical knowledge base on the use and impact of OER focusing in post-secondary education
2. Develop the capacity of OER researchers
3. Build a network of OER scholars
4. Communicate research to inform education policy and practice.

(Hodgkinson-Williams, 2013)

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concepts usefulness to other OER research programmes' research communications as well as caveats and constraints.

The field of research communications

It is useful to consider debates in the field of research communications so as to situate the work of ROER4D's communications function and to understand some of the broader issues that have influenced particular decisions in the development of the project's communications strategy.

Funders are increasingly concerned with the dissemination and currency update of research and are focussed increasingly on the methods and efficacy of communications so that research projects, processes and findings are communicated effectively and timeously to targeted stakeholders and to those for whom the research is deemed useful (Barnard, 2010). While many factors influence whether research is used or whether findings influence policy, research communication is a crucial factor (Georgalakis, 2011; Harris, 2013).

This is particularly the case with projects that fall under what is termed 'development research communications', which deal with the necessity of communicating evidence and findings of research to achieve social, economic and human capability goals centred around alleviating poverty and enabling factors such as access to education and healthcare. As many of these projects are situated in the global South, additional sensitivities abound creating creation of knowledge (from global North funders and researchers) which is then communicated to the global South reinforces structural relationships of power and deepens the historical boundaries of centre and periphery. Lewin and Patterson (2012) provide a useful historical overview of the competing discourses within the field of development research communications - describing how how linear top-down communications approaches - encapsulated as 'modernisation theory' - seeks to change behaviours and influence through the provision of findings from expert to recipient, while alternative perspectives involve participatory communications strategies that involve practices promoting inclusive dialogues involving researchers and citizens "sharing knowledge, experiences, and desires in order to pursue agendas of their own choosing" (Lewin & Patterson, 2012:41). This approach is allied to discourses not only around the type of research communications but also the type of development - one that privileges listening rather than telling, and respecting local knowledge and agendas (Quarry & Ramirez, 2009).

The field has also generated practical guidelines to assist researchers and communicators develop effective communications strategies and such guidelines similarly reflect changes in emphasis towards more participatory communication approaches. The discussions around the limitation or usefulness of the word 'dissemination' is one such evidence of contestation, whereby dissemination is sometimes considered to be associated with a one-way linear approach to communications with some guidelines opting to replace dissemination with the more seemingly more interactive terms 'consultations' or 'dialogues' (Benequista & Wheeler, 2012:47), while others consider that the focus should be on what people do with the research - uptake or utilisation are therefore preferred (DFID, 2013). Macoubrie and Harrison (2013) keep the word but talk about "value-added research dissemination" whereby "passive diffusion, or simply placing new information where

it can be found—even if targeted to a specific audience—is insufficient to encourage its spread" (Macoubrie & Harrison, 2013:4). The timing and frequency of when to communicate in a research project is influenced by perspectives on the nature of research communication with "the emphasis of participatory communication is often on the process of creation or engagement, rather than products" (Lewin & Patterson, 2013:41), and that research projects need to be communicating at planning stages around methodologies as well as later for findings (Macoubrie & Harrison, 2013; Neta et al., 2015)

Researchers now play varied roles in the research communication process; many researchers actively work with individuals who are directly impacted by research findings (Lewin & Patterson, 2012), while others play a "value-added role in moving information … [and engaging in] activities that add value by addressing expectations and concerns of audiences" (Macoubrie & Harrison, 2013:5). The emergence of intermediaries and knowledge brokers has added to the complexity of the landscape of research communications with researchers now engaging with a range of individuals and organisations who re-translate research and knowledge to specific interest groups (Georgalakis, 2011; Harvey, Lewin & Fisher 2012; Datta, 2012). Benequista & Wheeler (2012) describe four specific roles of researchers: i) Engineers and cartographers ii) Mediators and conciliators iii) Critical friends and advocates iv) Catalysts and leaders. These roles are 'types' that describe categories of knowledge created through research and the forms of engagement exhibited by the researchers in the research and communication process. Researchers who communicated instrumental knowledge tended to be 'engineers or cartographers' who produced knowledge from the "outside", either for a solution to a particular problem or with no specific audience in mind. Researchers who co-created knowledge through participatory methodologies tended to be 'Catalysts and leaders' working from the 'inside' and whose actions tended to generate interactive and critical forms knowledge. These roles, emanating from analysis and self-reflection of researchers, impacted on nature of the research whereby the "communication activities, which brought new forms of interactive knowledge to the researchers, broadened the scope of the enquiry" (Benequista & Wheeler, 2012:48). For roles that involved co-creation or participatory methods it became apparent that "a researcher's knowledge does not come from research alone, but from a variety of other experiences, including from the act of research communication itself (Benequista & Wheeler, 2012:47). These categorisations illustrate not only different researcher approaches to types of knowledge and forms of engagement but indicates how these factors influence the nature of the research communications.

Technology and media influences

Global developments in technologies and communication channels heralded by the advent of social media and Web 2.0 technologies has changed the way people are finding and consuming information, which has led to a convergence in ways of working in development research communication (Lewin & Patterson, 2012). Increasing ease and access to information via internet and mobile connectivity is changing to the way research is found and consumed and even what constitutes knowledge (Harvey et al., 2012). A study of policy makers in the UK Civil Service found that social media and web presence was increasing in importance (Talbot & Talbot, 2014), while a study across Ghana, Nepal, India and Ethiopia found that

policy makers were spending more time finding information rather than reading pre-sourced briefs (Batchelor, 2012).

Such emerging patterns of behaviour including low barriers to creating content and web-enabled publishing channels means that many convenient, creative and visual methods have been introduced to facilitate stakeholder engagement in research and communications (Lewin & Patterson, 2012). Examples include uploading presentations to SlideShare, blogging research as it happens, using Twitter and Facebook to build communities around research interests and using infographics to communicate research findings. One notable example of a creative output is the OER Research Hub's offering of a Massive Open Online Course (MOOC) on Open Research (Pitt, 2014) - an activity that was part of the research engagement process.

This is not to say that participatory media and methods are necessarily benign - digital divides abound in the global South (Harvey, Lewin & Fisher, 2012) and hierarchies tend to re-establish themselves. For example, a notable and increasingly researched phenomenon is the profile of Wikipedia editors - predominantly male and from the Global North (Lapowsky, 2015).

A complex picture thus emerges regarding approaches, new technologies and practices of research communications which is influenced by and in turn influences the practice of development. The next section focusses on the specific research communications function of the ROER4D project to share and reflect on the process and thinking behind the development of the programme's communications strategy.

Developing the research communications strategy for ROER4D

ROER4D is a 3-year global research project funded by the International Development Research Centre (IDRC) and the Department for International Development (DFID) with the primary objective to improve educational policy, practice, and research in developing countries by better understanding the use and impact of OER. Four key objectives underpin the project:

1. To build an empirical knowledge base on the use and impact of OER focusing in post-secondary education
2. Develop the capacity of OER researchers
3. Build a network of OER scholars
4. Communicate research to inform education policy and practice.

That communications is explicitly stated as an objective underlines its perceived importance from the funder and the PI and speaks to some of the challenges and opportunities identified in the section reviewing the field of research communications (above). Additionally the project's Communications and Evaluation functions are receiving mentoring from the Developing Evaluation & Communication Capacity in Information Society Research[1] (DECI-2). DECI-2 provides evaluation and communication capacity building tools and mentoring, and these services were offered to both the communication and evaluation functions of ROER4D from the inception of the project. The practical consequence of this has been that the

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[1] http://evaluationandcommunicationinpractice.net/

communications function has had a dedicated part-time resource to oversee the development and implementation of the communications function as well as ongoing mentoring and evaluation support.

ROER4D is not a single research project with one or a single group of researchers. There are 11 sub-projects with an initial group of research projects that commenced in late 2013 focused on the adoption of OER, while a further 7 studies researching the impact of the use of OER in Global South contexts joined the project early 2015. That the programme is a network level research project with a central team and multiple sub-projects researching the adoption and impact of OER in the Global South provides particular communication challenges. While the sub-projects research various aspects of the adoption and impact of OER, the programme as a whole looks at use and impact at a global South level hence the necessity to synthesise and communicate research processes, methodologies and findings at multiple levels.

Another factor that impacts on the nature of research communication in the ROER4D project is that all research outputs and data sets (where possible) will be made openly available and under Creative Commons licences encouraging sharing and re-use.

With these considerations, pressures and opportunities, communications strategies and implementation approaches become more complex requiring new skills, approaches and attitudes.

The development of a communications strategy for the ROER4D project will be extrapolated below with reference to three underpinning characteristics - **readiness**, **agility** and **openness -** that together form perhaps three lenses that may be useful for other research projects considering and developing research communications. The development of the communications strategy and its implementation is still an ongoing process and therefore the focus in this paper will be on three aspects that might be considered as enabling factors that contributed to the strategy's operationalisation and its continuing evolution.

Readiness

The DECI-2 project, an IDRC funded research project, offers a structured approach to developing a Research Communications strategy, involving working through a series of specific steps. (The DECI-2 project also mentored the development of an evaluation strategy through Utilisation Focussed Evaluation (UFE) and while there are overlaps, this paper will focus on the Research Communications aspect only).

The starting point of the DECI-2 process to develop Research Communications was to ascertain both organisational and team 'readiness' whereby a range of factors can be considered to show whether and how a communications resource or team can be ready to conceptualise, develop and deliver a communications strategy that meets the programme's core objectives. DECI-2 provides a checklist of questions for the project team as well as recommendations for what might constitute readiness (DECI-2, n.d.). These comprise organisational level factors such as staff, time, resources and support from senior management as well as questions about attitudes towards exploring communications through this process. A confirmation of the organisation's communication purposes is also recommended. A second stage of readiness

assessment looks at the readiness of the communications team with questions that cover the communications' team (or person's) skills and experience, possibility to hire external consultants and checklists that cover that the team has some idea of what is in store.

From my position as the Communications Advisor, this was a helpful process to set the stage and manage expectations. The literature has suggested that limited resources and skills of research teams and communications staff to effective, innovative and participatory methods of research communication is a constraint (Barnard, 2010) and the DECI-2 process makes explicit a crucial step that is perhaps more implicitly indicated in other types of research communications checklists and guidelines. An added advantage is that the research communications function receives additional buy-in and starts the self-reflection process on the part of the communications team prompting questions such as 'Am I ready'? or 'What do we need to have in place to be ready?"

However, decisions about readiness are open to interpretation. In the case of the ROER4D project with multiple sub-projects, multiple contexts (not all of which were known at the inception of the programme) it was not possible to ascertain without some doubt as to whether the programme was 'ready' at the outset, before the next steps of the process were taken on. Notwithstanding some crucial readiness factors (skilled staff, budget and managerial support were in place) we did not know for sure that we had enough staff or the right staff with the right skills as at that stage we did not know our specific outcomes. In such complex projects where there is no fixed strategy or clear pathway, communicators need to be naturally curious and be "ready to become ready". This is where an agile approach to communications was a helpful approach through which to develop the next steps towards developing our communications strategy.

Agility

The DECI-2 process, along with other research communications frameworks and processes, suggests a stepped and incremental process of developing a strategy. Following on from readiness (described above), the DECI-2 activities include (in order): stakeholder analysis, situational analysis, defining communication purposes and objectives, determining methods and media, field testing and then implementation of the strategy. Following implementation, assessing effectiveness through monitoring and evaluation follows. The DECI-2 team suggested this process for the ROER4D Communications Advisor and broader team. However before this process could start it proved necessary to start some form of communications from the time the Communications Advisor was appointed and the entire network met at a face to face meeting. At this early stage of the project, these communications outputs might be seen as standard 'corporate' or 'branding' approaches but because of the nature of the project's other objectives - research capacity building and networking to develop a network of OER scholars in the global South, the initial communications activities took on the task of sharing the process of research. Initially this was "internal" communications to other members of the research network, but as networking was 'baked' into the project's objectives, ROER4D's communications necessitated being 'open' to view right from the beginning - without field testing or sufficient audience feedback. In some ways, we were testing the waters in real time.

The practical result was that a series of communications activities, media and channels were set up from the inception of the project without having gone through the careful research communications strategy process delineated by the DECI-2 process. The DECI-2 process was to formally kick-off at a specified date a few months from the start of the project, but in the meantime the Communications Advisor supported by the PI and the network team progressed in setting up some basic building blocks of a research communications strategy. In retrospect, we were responding to immediate needs and iterating carefully, using digital media and online publishing platforms to build visibility for the project so that we could announce our presence to the global OER community as well as build a credible face for the network. For example the initial ROER4D website set up in a matter of days with basic information went through three rapid design changes in a number of months at project inception; this could be contrasted with a long drawn up process of design, specification, user testing which could have taken many months to a year before the final design might be released. The type of approach we were using, although we did not articulate it at the time, was what might considered as 'Agile' in software development terms:

"Using an agile project-management approach, a team builds their deliverables in small increments, releases usable training frequently, and uses those releases to collect feedback early and often. Successive approximation, aka iterative development, is central to agile methodology. It's how you proactively gather feedback and, yes, changes, so you can further improve your product"

(Torrance, 2014).

While agile continues to underpin our communication approaches, we have found the Research Communications methodology offered by the DECI-2 team incredibly useful to make explicit some of the implicit assumptions and as the communications brief and tasks becomes more complex, a constructed strategy is required. However, at the early stages of the project, agility enhanced our readiness. We knew after some incremental and agile work and feedback how ready we really were and what we needed to do to bolster our research communications. These early lessons not only helped our readiness but also the development of the formal research communications strategy because it gave us real experience and data to work with. For example, our activities on social media around conferences are targeted and strategic based on evaluation feedback about engagement both in terms of numbers and in terms of channels. We have, for example, found a productive and interesting relationship between releasing a presentation on SlideShare early, pre-tweeting, live tweeting and corresponding Twitter[2] and SlideShare[3] views. Yet these activities are aligned and part of the formal communications strategy - itself a live and evolving document. By the time we came to determine our communications purposes and specific communications objectives, we had a number of months worth of communications work and an idea of which channels were already proving to be successful and in

[2] https://twitter.com/roer4d

[3] http://www.slideshare.net/roer4d

which context. An agile approach gave us the tools and data to make more informed choices about methods and media and also pointed out where there were gaps in our understanding.

Openness and research communications

While "open" and "openness" are broad and inclusive terms to the extent that the concept may even considered to be so vague as to have become almost meaningless (Weller, 2014), its breadth does enable inclusivity across a range of sectors, fields and disciplines:

"the Open Movement is an umbrella term that describes a number of overlapping and interrelated movements that, collectively, support the idea of a free and open society in the Arts, Education, government, computing/code, research, technology, medicine, copyright/copyleft, and other key areas".
(ETMOOC, 2013)

The field of research communications can loosely be considered part of the 'open movement'; in any case openness has pervaded into research and communication methods with the Open Access (OA) movement and open scholarship enabling the sharing of research artefacts including the process of research (Weller, 2014). Thus sharing via researcher blog posts, adding presentations to SlideShare, sharing the process of writing research or crowdsourcing data are all part of a set of communication practices that not only lean towards openness but are enabled by openness. It requires an open ecology of sharing to crowdsource! On the other hand the relationship between openness and research communication is a contested one with traditional notions of researcher roles and reward structures often acting as deterrents to open research (Weller, 2014). It is likely that open communications - in the sense of sharing the process and methodologies of research - can only be possible if there is a commitment to open research on the part of the research team in the first place. This means that in some fields, "open" research communication is more difficult to envisage and operationalise.

Operationalising open practices in the context of the project's communications helps to envisage the role of openness. Smith (2014) discusses the relationship between openness and development and takes a critical view of the various movements that take on the openness descriptor, calling for a focus of using openness strategically when it can contribute to a development goal; he defines "being open" as the "strategic application of ICT-enabled openness practices (sharing, transparency, reuse, revision, remixing, crowdsourcing, and peer production) in ICT4D interventions/activities to help tackle a development problem" (2104:1). This is useful for operationalising how openness can be applied to a particular development initiative (in this case ROER4D's communications). Sharing is apparent when the project team uploads research outputs as presentations on SlideShare and shares them via Twitter and Facebook; transparency refers to both internal communications with sub-projects and with (for example) the publication of the ROER4D technical report on the website (Hodgkinson-Williams & Cartmill, 2014); reuse is encouraged through, for example, the availability of the ROER4D bibliography as well as use of Creative Commons licences on all project outputs; remixing is applied where an internal report is repurposed for a blog post and crowdsourcing is encouraged through

inviting comments on work in progress or calling for a collaboration over the workshop agenda for a forthcoming ROER4D workshop. There is openness and transparency built into the development of the communications strategy itself - work in progress developments are made freely available to the DECI-2 team for their comments and critiques, while the Communications Advisor shares the process of creating the strategy, including research on audience analysis with the network of researchers and has made it openly available on SlideShare (Walji, 2014). This has had viral benefits with over a 1200 views as well as interactions with other communication specialists and requests for further sharing and discussion (personal communication).

Reflections

The ROER4D communications function has been enabled by and characterised by these three concepts. Readiness has ensured preparedness for taking on the task of developing a communications function that is sustainable with an acknowledgement that structures need to be in place; these include resources, a supportive and enabling environment for the communications to flourish and the requisite skills. The availability of mentors, in this case, provided by the DECI-2 team, has allowed for the strengthening of these skills as well as structures that could allow readiness to happen: they provided a facilitated research communications development approach but led by and adapted by the ROER4D communications advisor and team.

Agility was an approach that was consciously partly out of necessity - the project communications function had to get going quickly - and so activities such as small incremental communications (a basic website, Twitter handle and a Facebook page) were quickly set up and changed on the fly often in response to feedback and "on the ground" responses from users. The quickly established communications channels were also used to develop the strategy - once the communications channels were up and real users tested them, changes were made as a response. As the communications function has matured and the facilitated process of developing the communications strategy has bedded down, the more formal strategic development has progressed alongside continuing agile changes.

Openness - as a set of practices - aligns to what the development research communications literature refers to as participatory communications whereby the engagement of stakeholders in the development of the research through communications improves not only the relevance (and possibly quality) of the research but also the possibility that it will be used. For the ROER4D project, there is a comfortable alignment between the project's open practices in communications and more generally openness in the project (baked in is the requirement to produce open research outputs and open datasets) and the discourse around participatory communications.

While these three facets underpin the ROER4D communications strategy, they are not without their costs, risks and constraints. First, as indicated in Smith (2014) in considering the cost-benefit analysis of such ICT-enabled open practices the time and the resources required to maintain the demands of openness should not be underestimated. Communicating in the open raises expectations of frequent, fast, accurate and quality communications interactions and outputs. A commitment to

share not only the outputs of research but also the process puts considerable strain on resources and there is even something of a "virtuous cycle" where open communications leads to more invitations to participate, which leads to more communications to fulfil those needs which in turn leads to further demands. For the management team and communications functions, a reality check as to what is possible and what can be done to maximise efficiency is required. Here the presence of external mentors in the form of the DECI-2 team have been helpful sounding boards, who have helped prioritise what is important.

Vulnerability and risk as also part of open communications, as they are of open research practices. There are situations where being open and transparent might do more harm in terms of a personal exposure of a team member or researcher, while the need to create safe spaces to make mistakes and learn from them is also speaks to the objective of the project - to build the capacity of OER researchers. The PI and network team has deliberated on this and has come up with the "Openness Magna Carta", which espouses principles that underlie all our work (including communications). These principles, which state a commitment to "Make Open...if it adds value...if it is ethical....if it is legal...by default" (Hodgkinson-Williams, 2014), accepts that not all research processes can be wholly open. This acknowledges that openness should not be for its own sake but where it adds value (Smith, 2014).

There was also an initial tension between the notions of readiness and agility, which could be the case for many new projects getting their research communications off the ground. In the case of the ROER4D project, the role of the DECI-2 mentors was to help develop and facilitate the project's communications strategy, which takes a structured and stepped approach through a series of activities. The underlying implication of this is that the communications resources, whether they are a team or one person must be ready before commencing the research communications strategy. In our case though, we developed a basic but core set of communications assets and channels based on immediate needs (the project was set up and needed a visual and actual presence online) in time for the first workshop in December 2013; this was done both for practical reasons and to fulfil a core project objective, which was to communicate to the broader OER and open education community that ROER4D existed, what its purpose and objectives were, who was involved and what its planned activities were. This need could not wait for a facilitated research communications process for practical reasons. In our case, the development of a coherent research communications strategy which can be measured and evaluated (a core funder requirement) has developed alongside an agile approach to interactive communications development. Practically the research communications strategy development is iterative, and it is likely that as the project moves from focussing on communicating research outputs to research findings, some of the analysis steps such as stakeholder analysis will be revisited.

Readness becomes therefore a way of constant learning especially as new challenges and opportunities emerge in the communications environment, but in its most basic conception, it is still unclear at what point a research communications programme might feel ready at least to start iterating. At the very least, our experience suggests that resources in the form of staff with some communications experiences (and a willingness to be agile) combined with an enabling environment may be sufficient to start, but each project would need to make its own judgements based on context. The

risks of starting communications in an open environment may need to be weighed with the advantages of an agile approach.

Conclusions

The ROER4D project has invested a significant amount of resources into its research communications function - as research communication is a core objective that needs to be measured, evaluated and reported on. While this may imply an inevitability to its operationalisation, our experience has shown that research projects may have considerable scope in how to develop this function so that it best serves the needs of the project, its funders and the needs of the people who are affected by the research. We have found the concepts of readiness, agility and openness useful lenses and enablers to develop, innovate and evaluate our research communications - readiness is being realistic to become prepared; agility is being prepared to learn through iteration, while openness in communication is to consider research communication as integrally part of the broader research and engagement process. In this way the project's research communications becomes part of the research process itself and may contribute to answering the key research question - to what extent can the adoption and impact of OER contribute to educational outcomes in the Global South.

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