DEVELOPING AND PLANNING A COMMUNICATIONS STRATEGY FOR THE ROER4D PROJECT

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Developing and planning a communications strategy for the ROER4D project - sharing insights and lessons for South African Institute for Distance Education

22 May 2017

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Centre for Innovation in Learning & Teaching, University of Cape Town
Introductions

ROER4D Network Hub team at CILT, UCT

ROER4D Network with Lead Researchers

Please introduce yourself and say what you hope to get out of this session...
ROER4D Phases 1 & 2

**ROER4D Phase 1: Adoption Studies**

- 18 independent sub-projects
- 100 researchers & research assistants
- 16 time zones
- Aug 2013 - Dec 2017

Hosted by the University of Cape Town, South Africa and Wawasan Open University, Malaysia

Funded by the IDRC & DFID
ROER4D question and objectives

Whether, how, for whom and under what circumstances can engagement with open educational practices and resources provide equitable access to relevant, high quality, affordable and sustainable education in the Global South?

Objectives

1. Build an empirical knowledge base on the use and impact of OER in education

2. Develop the capacity of OER researchers

3. Build a network of OER scholars

4. Communicate research to inform education policy and practice

5. Curate research data and publications for dissemination.
ROER4D was mentored by DECI-2 - an IDRC project to develop research communication and evaluation capacity.
What do you mean by a “communications strategy”?  
What does it look like?

A communications strategy as an output/thing?  
   A documented set of goals with targets and outcomes?  
   A map for what communications activities should look like?

A communications strategy as a process or way of doing?  
   An ongoing focus on doing communications throughout the lifetime of a project or set time for the life of an organisation
Developing a communications strategy

The ROER4D story…in 3 phases

Phase 1: Designing a communications strategy
Phase 2: Implementing the communications plan
Phase 3: Iterating and responding to audiences

http://evaluationandcommunicationinpractice.net/resources-publications/resources-to-get-you-started-in-research-communication
Phase 1: developing a communications strategy

1. Assessing program readiness
2. Situational analysis
3. Purposes
4. Audiences
5. Methods & media
Phase 1: Readiness

**Project or institutional readiness?**
- budgets, leadership support

**Individual - who?**
- time, skills, resources

Build a communications mindset for a project

Need a minimum infrastructure to get going with communications work - management and individual(s) in place

Beyond a minimum infrastructure in place the project needs people who willingness to learn and respond
Phase 1: Situational analysis

Focusses around a set of questions to see where you are…

Internal

Why do we need to communicate?

What are we already doing in terms of communications?

External

What’s happening in our space?

Who is interested in our work?

What opportunities are there to make any impact?
Getting started with situational analysis

1. ASSESSING PROGRAM READINESS
2. SITUATIONAL ANALYSIS
3. PURPOSES
4. AUDIENCES
5. METHODS & MEDIA
Phase 1: Developing your communications purposes

To what purpose are you communicating?

Write down all the purposes and objective behind that purpose

Audiences who are behind those purposes

How you might achieve that (methods and media)

Purposes (why) drive this but can’t be separated from audiences (who). Depending on how much you already know about them, you might be able to start talking about methods and media
Defining purposes, objectives, methods and media
### Various objectives for communications

| Visibility | Get on the academic radar | External – OER researchers | Website with blog, Twitter feed, links to events (external – e.g. ROER4D – IS Call for proposals; ROER4D Research Instrument questions; ROER4D research reports)
Conferences, seminars, workshops:
- 10-15 Mar 2014 - Open Education Week
- 23-25 Apr 2014 OCWC Conference
- 28-29 Apr 2014 OER 2014?
- May 2014 eLearning Africa
- 24-27 Jun 2014 OERAsia conference
Video
Stickers with ROER4D URL
AG Members and researchers (e.g. Judith Pete going to eLearning Africa) as ‘ambassadors’ |
| Visibility | Build credibility around OER with academics | External – colleagues at participating institutions? WOU? Sao Paulo? |
| Visibility | As above (combine) | External – UCT colleagues | Conferences, seminars, workshops
14 Mar Open Education Week
Teaching and Learning Conference |
| Knowledge generation | Modelling open research Minimise duplication and time efficiency | Internal researchers (whole project team) | Google docs
Collaborative writing
Publication harmonisation |
| Knowledge generation | Build a common language | Internal researchers (whole project team) | Vula
Sources
- Bibliography (needs to be updated)
- Slideshare |

### Overarching purpose for those objectives

- Extract from workshop documentation to develop communications purposes
Completing initial stakeholder analysis

4 purposes established:
1. Visibility
2. Networking
3. Knowledge generation
4. Research capacity building

Internal and external audiences established mapped to purposes
- Researchers and scholars
- ‘policy-makers’
- ‘funders’
- named individuals

Some methods identified for communicating with audiences
- website
- social media
- outputs

Much of this is emergent and exploratory...
Phase 1: developing a communications strategy

communication objectives aim to be measurable statements that guide the design and implementation of the Communication Strategy

While partially complete this is ongoing
Writing communications objectives

**VISIBILITY**

1. To establish ROER4D as a significant OER Research project using the website, Social Media (mainly Twitter and Facebook), Slideshare and External Press among global OER networks, organisations and programmes to the extent that the project receives invitations for dialogue and participation from external OER network members.

2. To establish credibility and receptivity (as research develops and findings can be communicated) through physical and online participation at key conferences in 2014-2016 (and hopefully in 2017) with OER researchers and policy makers to the extent that positive feedback is received and the project receives invitations for further dialogue and participation at other events.

**KNOWLEDGE GENERATION**

3. To share our research process openly with both internal researchers in the ROER4D network and external OER researchers, to contribute to the field of ‘open research’, using Website, SlideShare, publications, social media, webinars to the extent that other networks acknowledge and draw on the practices.

4. To share and communicate research findings that relate to use, adoption and impact of OER in Global South with both internal researchers in ROER4D network and external OER researchers, using Website, OpenUCT/open repositories, Slideshare, publications, social media, webinars, blog posts and external press to discuss findings to the extent that ROER4D becomes a “reference point” in the OER field (increase # of papers and Slideshare downloads, increase in citations, increase in conference engagements and Twitter traffic).

**NETWORKING (internal)**

5. To build links among researchers within the ROER4D network by sharing information via email announcement, website, newsletter and social media (especially when organizing face to face events and online interactions) to the extent that researchers report feeling part of the ROER4D network (in end-of-event evaluation forms and social network analysis).
Phase 2: Towards implementing communications plan

Design of activities, selection of media and channels for audiences and described in communications objectives plan.
Phase 2: description of media and channels

"At a glance" view of plan
## Phase 2: content outputs and channels mapped to purposes

<table>
<thead>
<tr>
<th>Type of content output</th>
<th>Channel</th>
<th>Align to purposes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tweets</td>
<td>Twitter</td>
<td>Visibility, Networking (Primary) Knowledge Generation (Secondary)</td>
</tr>
<tr>
<td>Facebook posts</td>
<td>Facebook</td>
<td>Visibility, Networking (Primary) Knowledge Generation (Secondary)</td>
</tr>
<tr>
<td>Website - Sub-project pages</td>
<td>Website</td>
<td>Visibility, Knowledge Generation</td>
</tr>
<tr>
<td>Website - Gallery</td>
<td>Website</td>
<td>Visibility</td>
</tr>
<tr>
<td>Website - Directory</td>
<td>Website</td>
<td>Visibility, Networking</td>
</tr>
<tr>
<td>Website - About menu pages</td>
<td>Website</td>
<td>Visibility</td>
</tr>
<tr>
<td>Website - Network coordination outputs</td>
<td>Website</td>
<td>Knowledge Generation</td>
</tr>
<tr>
<td>Blogs</td>
<td>Website blog tool</td>
<td>Visibility, Knowledge Generation (Primary)</td>
</tr>
<tr>
<td>Weekly announcement email</td>
<td>Mailchimp (dissemination) Website blog tool (copy for dissemination)</td>
<td>Networking - Internal (Primary) Visibility (Secondary)</td>
</tr>
<tr>
<td>Newsletter</td>
<td>Mailchimp Published on Website blog tool</td>
<td>Networking, Knowledge Generation (Primary)</td>
</tr>
</tbody>
</table>
The Research on Open Educational Resources for Development (ROER4D) project aims to provide evidence-based research from a number of countries in South America, Sub-Saharan Africa and Southeast Asia. The primary objective of the programme is to improve educational policy, practice, and research in developing countries by better understanding the use and impact of OER. In order to address this objective, the specific objectives of the programme are to:
ROER4D Facebook presence

This week's update features forthcoming seminars on #OEP from the e/merge Africa network, news about #opentextbooks and links to internet use research in selected African countries from Research ICT in Africa.

ROER4D weekly update – 19 May 2017

The e/merge Africa Network is offering two webinars on the theme of growing open educational practices (OEP). The first webinar of the series t...
The adoption and impact of OEP and OER in the Global South: Theoretical, conceptual & methodological framework for the ROER4D project meta-synthesis

Cheryl Hodgkinson-Williams
OE Global 2017, Cape Town, 8-10 Mar 2017
http://www.slideshare.net/ROER4D/
ROER4D at conferences
ROER4D presence enhanced with social media

- Use of social media to amplify conference attendance
- Live tweeting during key presentations
- Participation in virtual events at face to face events
- Set up appointments with key stakeholders
- Virtual friendly “stalking”
Phase 2: Monitoring and iterating

1. Assessing Program Readiness
2. Situational Analysis
3. Purposes
4. Audiences
5. Methods & Media
6. Communication Objectives
7. Communication Strategy Design
8. Pretesting
9. Implementation
10. M&E
11. Institutionalization
Purpose and use of monitoring

To track effectiveness of communications strategy
- track media mentions and requests for participation
- track ROER4D publications and outputs
- track follower counts on social media
- formal evaluation as part of ROER4D evaluation

Monitor website via Google analytics
- input into redesign of website
- track popular pages on website

Formal stakeholder analysis of communications
- interviews with researchers in networks

Need to set up tracking and monitoring process and documentation - some automated, some manual
A responsive and participatory communications approach, enabled by social media, means ongoing audience identification and stakeholder engagement.
Phase 3: stakeholder mapping and engagement

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>AUDIENCE/STAKEHOLDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visibility (for project)</td>
<td>1. Government/policy makers&lt;br&gt;2. Teachers/educators&lt;br&gt;3. Institutions (HEI, Schools)&lt;br&gt;4. OER/OE community (practitioners and researchers)&lt;br&gt;5. Global researchers&lt;br&gt;6. Funders&lt;br&gt;7. Development community&lt;br&gt;8. Others (specific interest/discipline) &lt;br&gt; a. Textbook publishers&lt;br&gt; b. Open data community&lt;br&gt; c. MOOC providers&lt;br&gt; d. Language practitioners&lt;br&gt; e. etc</td>
</tr>
</tbody>
</table>

| (specific research chapters with thematic and/or geographic focus will align to specific audiences) |                                                                                     |

| Networking                      | “Internal” ROER4D researchers and OER community                                     |

Mid-project stakeholder mapping exercise using data collected as part of communications activities
Phase 3: iterating and responding to audiences

Ongoing iteration between audience engagement and M&E data feeding into implementation plan and activities.
Next steps

Design of final ROER4D outputs in progress

- edited volume of research chapters as an e-book
- papers and book chapters in progress
- enhanced web pages to showcase research
- video interviews with researchers in production
- “policy briefs” for bite-sized intros to research
- participation at educator, researchers, policy-maker levels in progress
- looking for windows of opportunity for research impact
Challenges to implementing a communications strategy

Resources

Time, skills, aptitude

Social media engagement can be challenging for many

Buy-in from management and colleagues

Ensuring fresh up-to-date content

Blogging (but difficult to sustain)

Harvesting network for content

Persistence

Takes time to build profile and networks
Further resources

Walji, S (in press). An agile approach to Research Communication in the ROER4D project. [Chapter as part of edited volume for ROER4D project]

Draft chapter for review at https://docs.google.com/document/d/1hKUZiomy3kI_iijr0GeJtgZF5YiGWu7nQEN28TSnHrE/edit# (comments welcome)
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