

# FACTORS ENABLING AND CONSTRAINING OER ADOPTION AND OPEN EDUCATION PRACTICES: LESSONS FROM THE ROER4D PROJECT

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*IDRC Grant/ Subvention du CRDI: 107311-001-Research into Open Educational Resources for Development*



**Factors enabling and constraining OER adoption and Open Education Practices:  
lessons from the ROER4D project**

**Presentation at World Conference for Online Learning,  
Toronto, Canada, 15-19 October 2017**

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<http://www.slideshare.net/ROER4D/>



# Research on Open Educational Resources for Development in the Global South

August 2013 - December 2017

## GENERAL OBJECTIVE:

IMPROVE EDUCATIONAL POLICY, PRACTICE and RESEARCH in developing countries  
by better understanding the use and impact of OER

### PROJECT CLUSTERS

- OER Desktop Review
- OER Survey
- Academics' adoption of OER
- Teacher educators' adoption of OER
- OER adoption in one country
- OER impact studies
- Baseline educational expenditure



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**ROER4D**  
Research on Open Educational Resources for Development  
2013-2017



**wawasan**  
**open UNIVERSITY**  
the people's university

**IDRC**  
International Development  
Research Centre

**CRDI**  
Centre de recherches pour le  
développement international

**ukaid**  
UK Aid

created by Roxindie Carstens and the ROER4D team



**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

# Research question

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?

For this presentation we are interested in:

**Factors that may enable and constrain OER Adoption and Open Educational Practices in Global South contexts**

# OEP and OER - perspectives from literature

- Since at least 2007, researchers have included “practices” as a constituent aspect of the OER movement (Andrade et al. 2010)
- “OEP is a broad descriptor that includes the creation, use and reuse of OER, open pedagogies, and open sharing of teaching practices” (Cronin, 2017)
- Although much of the conceptualisation and research on OEP and OER has taken place in the Global North (Andrade et al., 2010; Ehlers, 2011; Porter, 2013), a growing number of studies in the Global South is surfacing the shift from OER to OEP (Czerniewicz, Glover, Deacon & Walji, 2016; Perryman & Seal, 2016)

Varied **approaches** to defining OEP

Masterman (2016) argues that developing an OEP conceptual framework “**involves disparate sources**” for OEP as there is a lack of a “**holistic repertoire of practices currently observable in the field**”.

# Mapping “ways of seeing” OER->OEP

OER

OEP

Open Pedagogy and other OEP descriptions

4Rs (later 5Rs) framework where permissions inherent in OER when activated lead to optimal educational outcomes

Shift to promoting practices to enable optimal use of OER

OPAL (2011)

Wiley (2007, 2014)

Ehlers (2011)

OER as a catalyst for OEP

Beetham (2012)

OEP enables optimising of current pedagogy

Wiley (2014)

Hodgkinson-Williams (2014)

Open Pedagogy as a subset of OEP

Hegarty (2015)

Karunanayaka (2015)

Broader & critical definitions of OEP:  
-networked participation  
-open teaching  
-critical digital pedagogy

Masterman (2016)

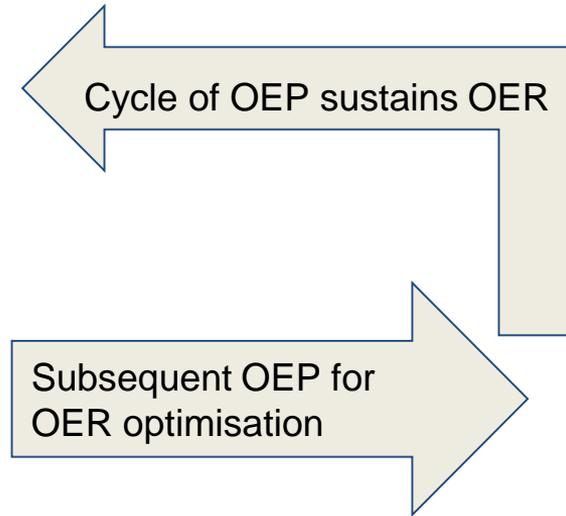
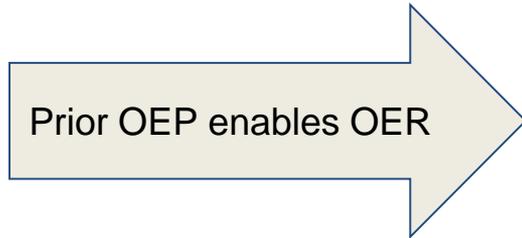
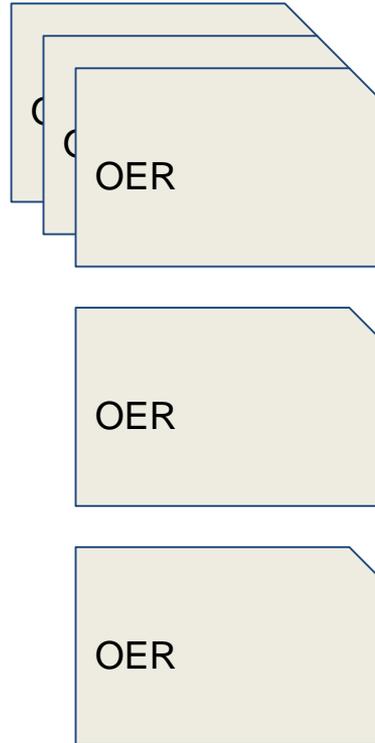
Strategic selection of OEP to meet pedagogical goals

OEP can lead to OER awareness

Cronin (2017)

# “Ways of seeing” OER-OEP in ROER4D

For OER to exist there must be prior open educational practices

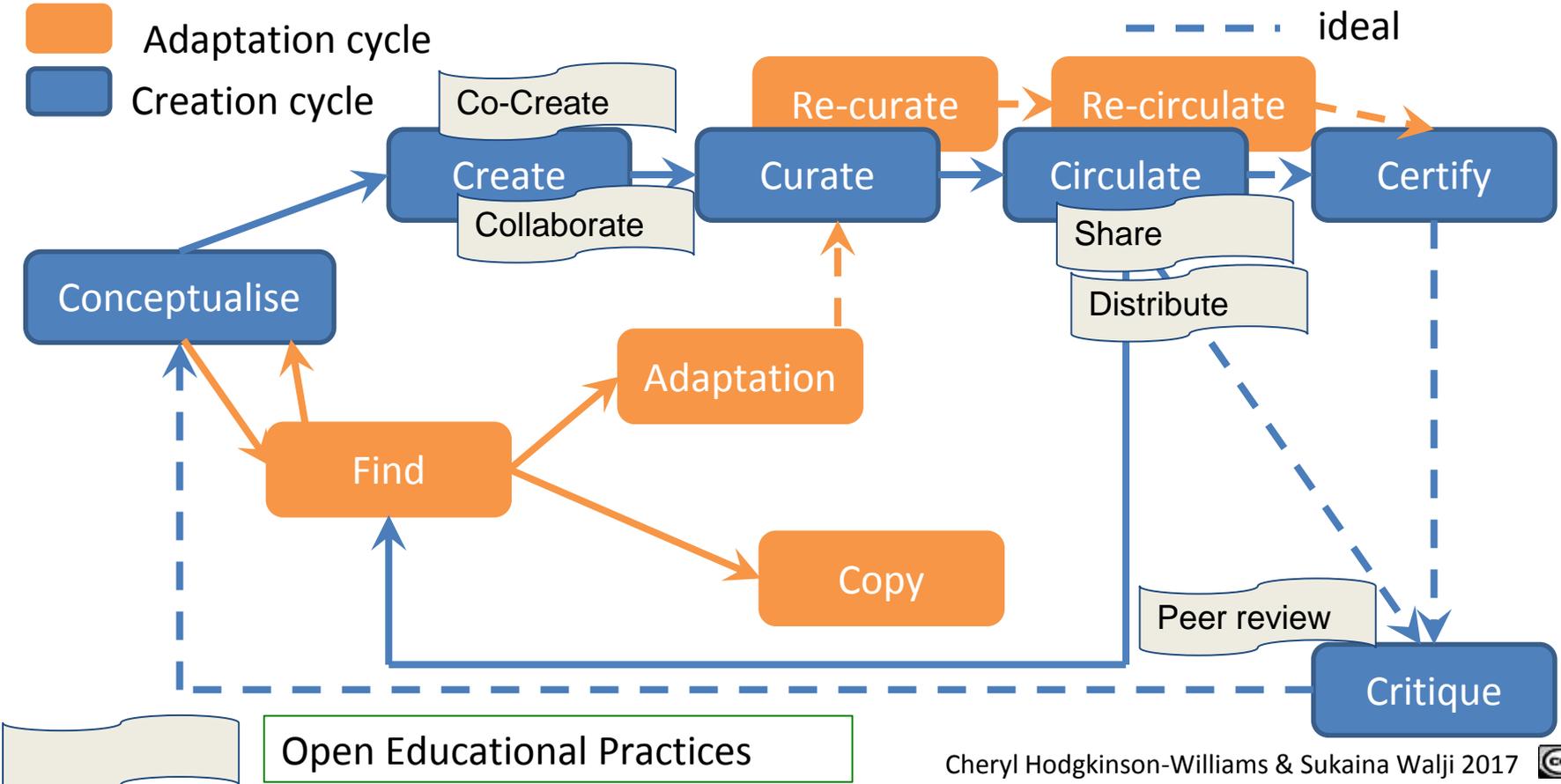


For OER to be optimised and sustainable, there must be subsequent open educational practices

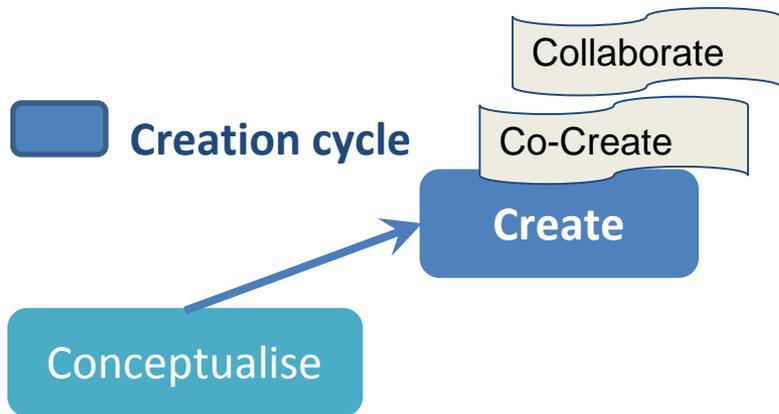
# 10C Open Education Cycle (Hodgkinson-Williams, 2014)

Process	OLnet 2010	Wiley (2014)	White & Manton (2011)	Okada (2012)
<b>Conceptualise</b> (plan, propose, imagine)			deciding	
<b>Create</b> (develop, produce, make)	design			
<b>Curate</b> (keep)		Retain - make, own, and control copies of the content		
<b>Circulate</b> (host on public platform/s)		Redistribute - share copies of the original content, your revisions, or your remixes with others	delivering	
<b>LoCate</b> (find, choose)	select		discovering, discerning	
<b>Copy</b> (re-use “as is”)		Re-use - the right to use the content in a wide range of ways		
<b>Customise</b> (edit, translate, localise)	(design)	Revise - adapt, adjust, modify, or alter the content itself	designing	re-authoring, contextualising, re-designing, summarising, repurposing, translating, personalising, re-sequencing
<b>Combine</b> (mix, group, mash-up)		Remix - combine the original or revised content with other open content to create something new		decomposing, re-mixing and/or assembling
<b>Certify</b> (quality assure, accredit)				
<b>Critique</b> (reflect, judge)	evaluate			7

# Open Education Cycle - seeing OEP



# Open Education Cycle



## Factors influencing **Create**

- Awareness of open licensing
- Lack of understanding of copyright & open licencing
- Technical capacity of individuals
- Infrastructural access (less in Higher Education contexts)

Many examples of **Creation** practices in the ROER4D projects

-some 23% of educators had created OER acc to survey of

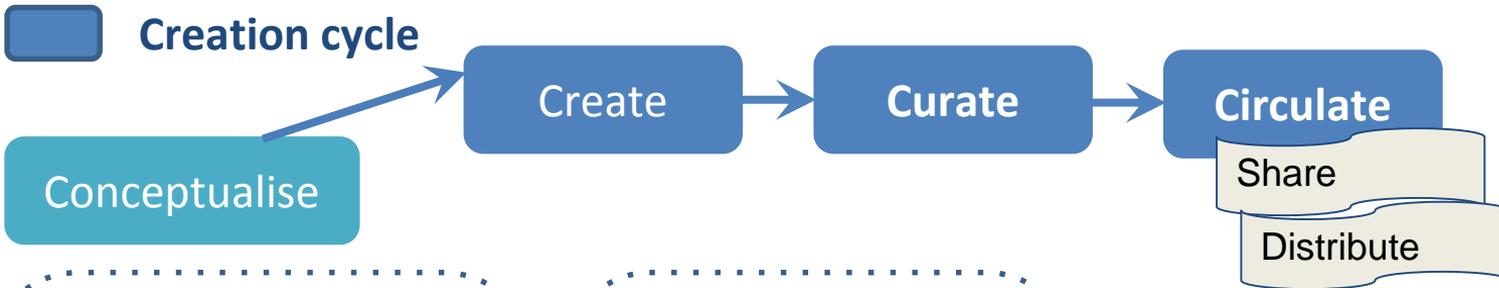
-22 school teachers in Colombia created OER some collaboratively

-The KOER program had teachers co-creating resources in Kannada as well as English

-117 lecturers in 4 Indian universities more likely to create OER than adapt OER

-In a study of 4 MOOCs at a South African university, most of the MOOC materials carried an CC licence

# Open Education Cycle



## Curation

In some ROER4D studies **OER are formally tagged and openly licenced as in** study of school teachers in India

But other OER often in closed LMS or platforms such as in study in Sri Lanka for student teachers or OER in MOOCs in South Africa

## Circulate

Often circulate was informal e.g. via email as **sharing** practices between teachers

But more formal **distribution such as placing on a public platform** was less common

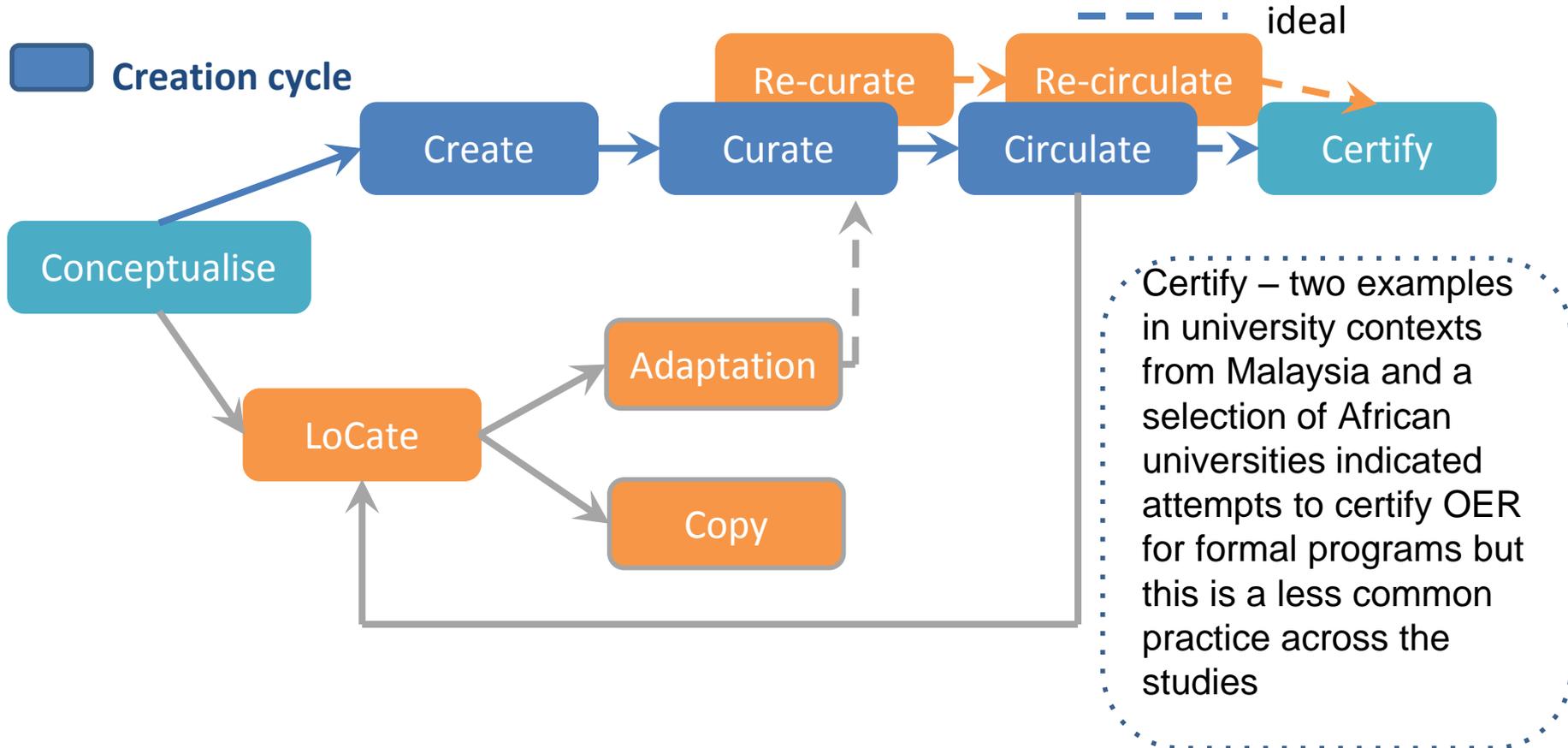
## Factors influencing **Curate & Circulate**

Curation is not a 'usual practice' for many teachers

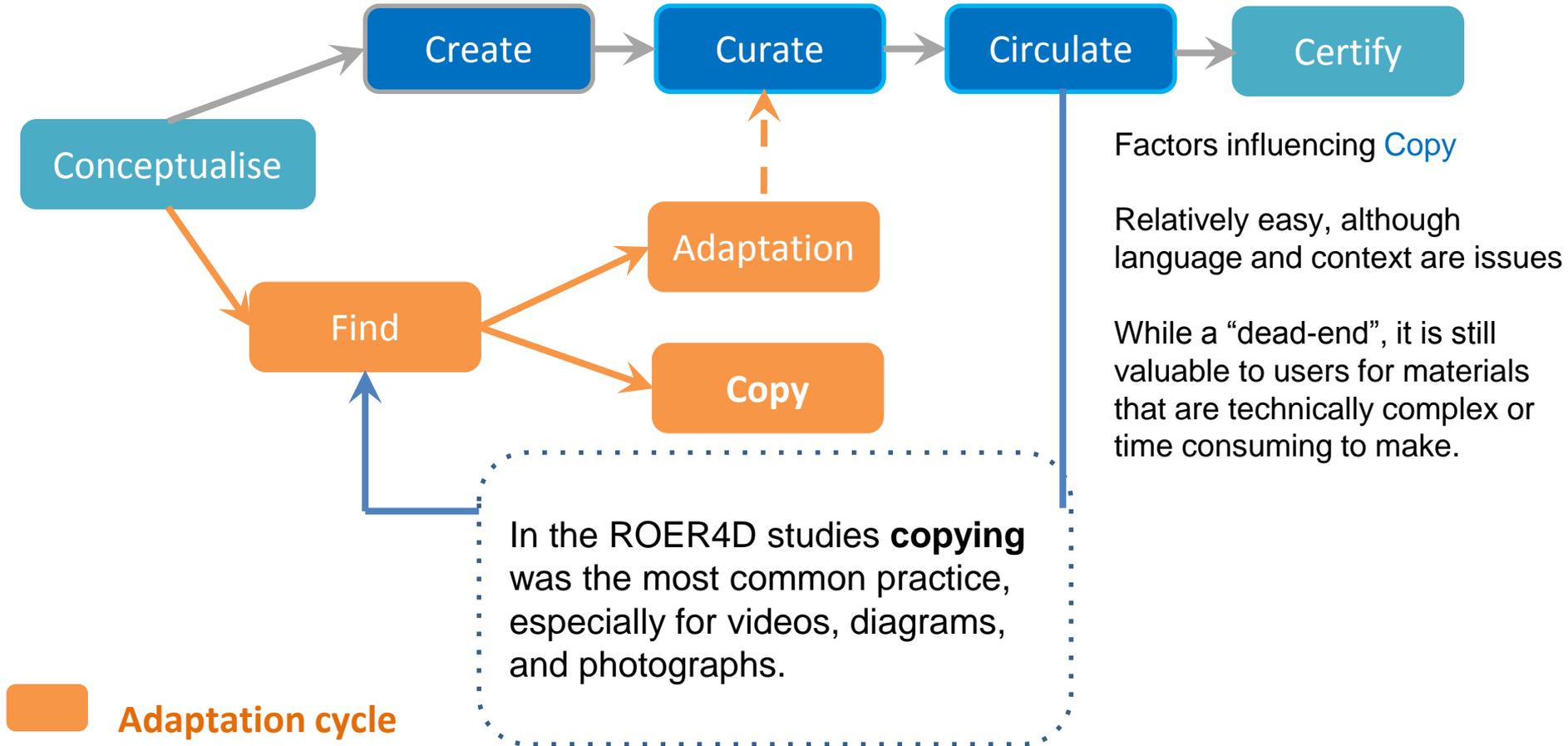
Circulate tends to be more informal sharing than formal distribution (concerns about quality or that lecturers lack permission to share openly)

Therefore in the absence of more formal curation and distribution the **cycle risks breaking down**

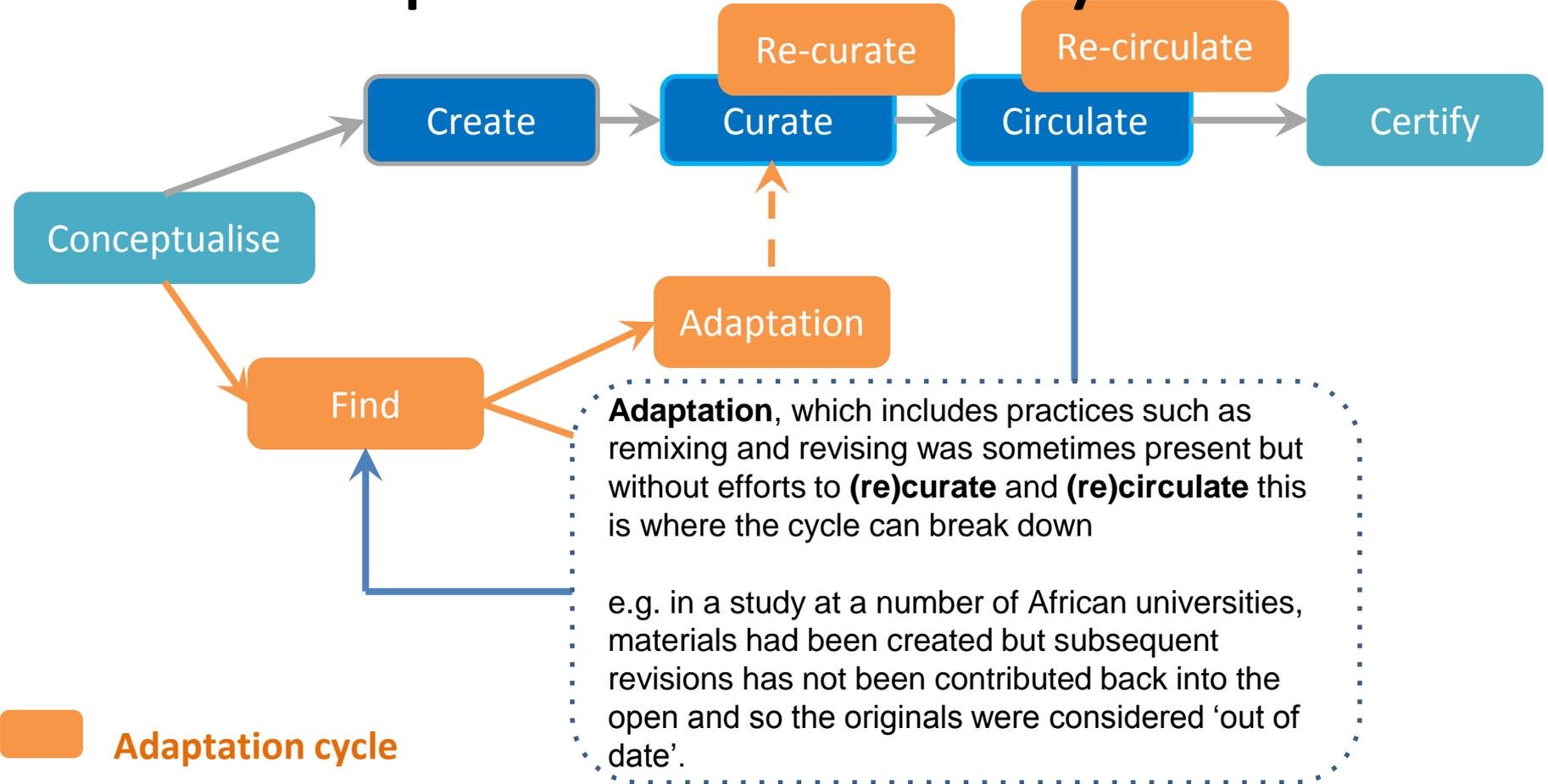
# Open Education Cycle



# Open Education Cycle



# Open Education Cycle



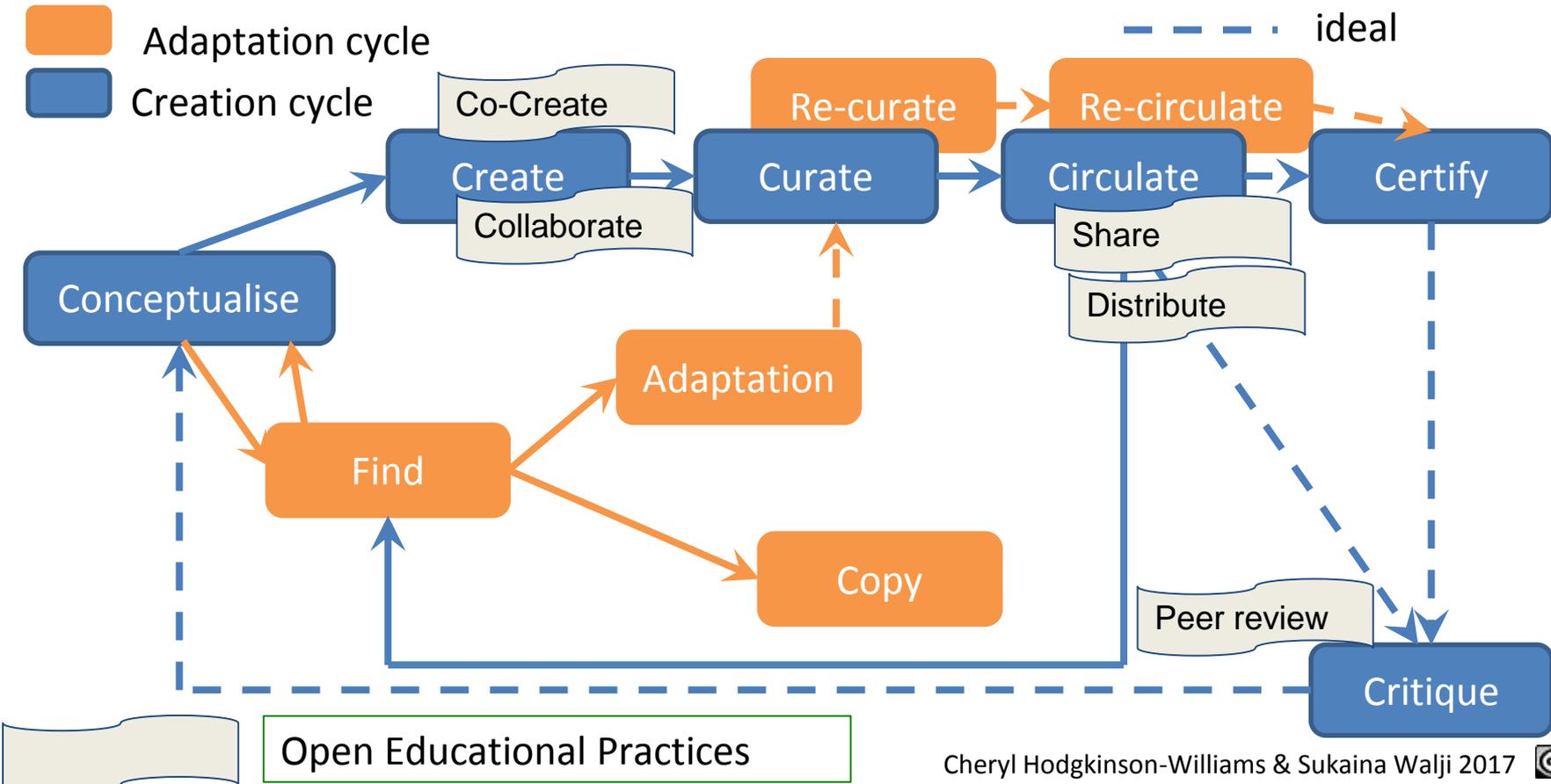
# Ease of use of OER adoption and related OEP

- **Copy** and **Create** are prevalent and relatively easy

But copy and create not sufficient for the cycle

- **Curation** is difficult for many educators
- **Circulation** through formal distribution is less common practice for educators rather than informal sharing practices
- **Adaptation** is sometimes hindered without sufficient curation and circulation practices while challenges for **re-curation** and **re-circulation**
- **Certify** is less commonly seen

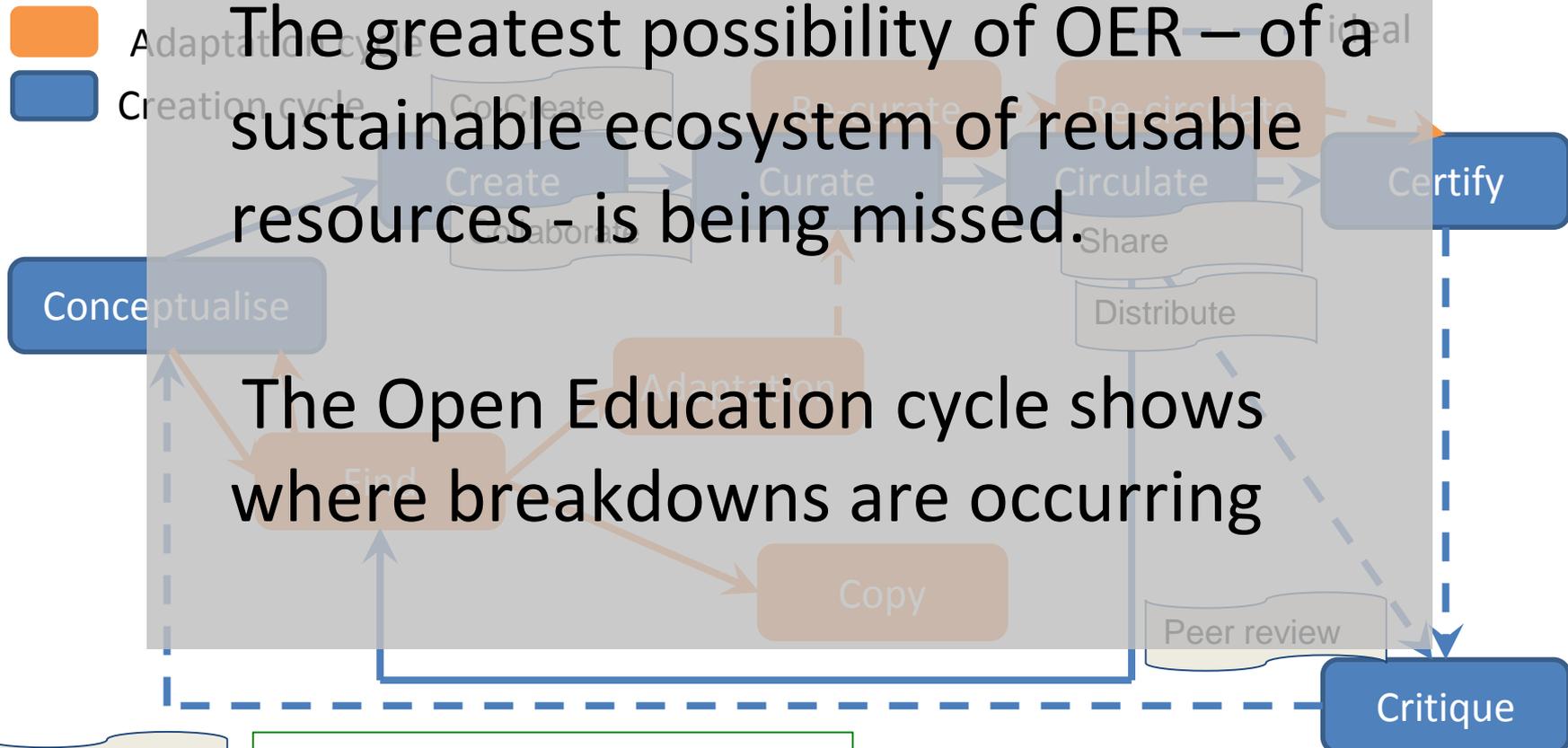
# Open Education Cycle - seeing OEP



# Open Education Cycle - seeing OEP

The greatest possibility of OER – of a sustainable ecosystem of reusable resources - is being missed.

The Open Education cycle shows where breakdowns are occurring



Open Educational Practices

# Citation and attribution

Walji, S. & Hodgkinson-Williams, C.A. (2017). **Factors enabling and constraining OER adoption and Open Education Practices: lessons from the ROER4D project.** World Conference for Online Learning, Toronto, Canada, 15-19 October 2017. Retrieved from: <http://www.slideshare.net/ROER4D/>

