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

Walji, S.; Hodgkinson-Williams, C.;

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

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Sukaina Walji & Cheryl Hodgkinson-Williams
Centre for Innovation in Learning & Teaching, University of Cape Town

http://www.slideshare.net/ROER4D/
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”.

4
Mapping “ways of seeing” OER->OEP

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

OER as a catalyst for OEP

OEP enables optimising of current pedagogy

Open Pedagogy as a subset of OEP

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

Strategic selection of OEP to meet pedagogical goals

OEP can lead to OER awareness

OPAL (2011)

Beetham (2012)

Wiley (2007, 2014)

Ehlers (2011)

Wiley (2014)

Hodgkinson-Williams (2014)

Hegarty (2015)

Karunanayaka (2015)

Cronin (2017)

Masterman (2016)

Sukaina Walji 2017
For OER to exist there must be prior open educational practices.

Prior OEP enables OER.

OER

OER

Cycle of OEP sustains OER.

Subsequent OEP for OER optimisation.

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

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

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

Adaptation cycle
Creation cycle

Conceptualise

Co-Create -> Create -> Curate

Collaborate

Find

Adaptation

Copy

Re-curate -> Re-circulate

Certify

Collaborate

Share

Distribute

Peer review

Critique

Cheryl Hodgkinson-Williams & Sukaina Walji 2017
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

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)
Open Education Cycle

- **Creation cycle**
  - Conceptualise
  - Create
  - Curate
  - Circulate

**Curation**
In some ROER4D studies, OER are formally tagged and openly licenced as in the 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.
Certify – two examples in university contexts from Malaysia and a selection of African universities indicated attempts to certify OER for formal programs but this is a less common practice across the studies.
In the ROER4D studies copying was the most common practice, especially for videos, diagrams, and photographs.

Factors influencing Copy

Relatively easy, although language and context are issues

While a “dead-end”, it is still valuable to users for materials that are technically complex or time consuming to make.
Open Education Cycle

Adaptation, which includes practices such as remixing and revising was sometimes present but without efforts to (re)curate and (re)circulate this is where the cycle can break down.

e.g. in a study at a number of African universities, materials had been created but subsequent revisions has not been contributed back into the open and so the originals were considered ‘out of date’.
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
The greatest possibility of OER – of a sustainable ecosystem of reusable resources - is being missed.

The Open Education cycle shows where breakdowns are occurring
Citation and attribution