



Communicating Research on Open Educational Resources for Development (C-ROER4D) in the Global South

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Link to website: <http://roer4d.org>

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Acronyms and abbreviations

CHED	Centre for Higher Education Development
CILT	Centre for Innovation in Learning and Teaching
COL	Commonwealth of Learning
C-ROER4D	Communicating Research on Open Educational Resources for Development
DECI-2	Designing Evaluation and Communication for Impact
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
DOT4D	Digital Open Textbooks for Development
GO-GN	Global OER Graduate Network
IDRC	International Development Research Centre
INASSA	Information and Networks in Asia and Sub-Saharan Africa
MOOC	Massive Open Online Course
OE	open education
OEP	open educational practices
OER	open educational resources
PI	Principal Investigator
ROER4D	Research on Open Educational Resources for Development
UCT	University of Cape Town
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAf	Universities South Africa
WIPO	World Intellectual Property Organization

Executive summary

The Communicating Research on Open Educational Resources for Development (C-ROER4D) project was a six-month initiative hosted in the Centre for Innovation in Learning and Teaching (CILT) at the University of Cape Town (UCT). The project promoted evidence-based educational policy and change in practice through leveraging the investment made in and work conducted as part of the Research on Open Educational Resources for Development (ROER4D) project. ROER4D was a four-year research network initiative that focused on researching the adoption and impact of open educational resources (OER) in the Global South.

C-ROER4D communicated the ROER4D research findings through a variety of channels and produced an Open Research Toolkit profiling the aggregated bibliography as well as the conceptual and analytical framing and the methodology employed in the meta-synthesis of sub-project findings presented in the project's edited volume, *Adoption and Impact of OER in the Global South*. C-ROER4D also published an open education research Project Activity Toolkit, providing practical details on the five core operational portfolios of the UCT Network Hub in the ROER4D project: networking, evaluation, communications, research capacity development, and curation and dissemination.

C-ROER4D engaged in various levels of research-to-policy activities internationally (United Nations Educational, Scientific and Cultural Organization (UNESCO), Commonwealth of Learning (COL), Creative Commons), nationally (South African Department of Higher

Education and Training) and institutionally (UCT) and continued to provide recommendations on open education policy and implementation to policy-makers, practitioners and researchers. Key outcomes were the ROER4D and C-ROER4D Principal Investigator's (PI) application for a UNESCO Open Education Chair, contributions to the UNESCO OER Plan and participation on a panel to provide advice on the international UNESCO-COL OER policy development process.

C-ROER4D, in association with the Director of the Centre of Innovation in Learning and Teaching (CILT) developed a new proposal, Digital Open Textbooks for Development (DOT4D) for a project that will investigate the current ecosystem of open textbook publishing activity at UCT and provide implementation support in open textbook publishing activity. The IDRC accepted this proposal in late June 2018 and it is scheduled to commence on 1 July 2018.

Finally, the project developed a policy-relevant research perspective on the relationship between open education and social justice, with a specific focus on gender, which is envisaged as a possible conceptual framing for the DOT4D project as well as additional work arising from the ROER4D findings.

The research opportunity

Rather than being focused on a research “problem”, the C-ROER4D chose instead to frame the focus of the project as an opportunity to leverage the research conducted and networks built in the prior project, ROER4D. The key imperatives were therefore to:

- Engage in research-to-policy activities by leveraging the network established and communications efforts undertaken in the ROER4D project to disseminate ROER4D findings and stimulate open education policy development.
- Publish the conceptual tools utilised in the ROER4D meta-synthesis of sub-project findings, promoting an open research approach to dissemination of research artefacts.
- Publish a project activity toolkit outlining activities associated with each of the ROER4D Network Hub pillars of project management activity: networking, evaluation, communications, research capacity development, and curation and dissemination.
- Explore how a gender and social justice lens can be applied to open education research.
- Employ lessons learned and experience gained in previous “open” grant-funded initiatives to develop a proposal for a future project in open education.

Progress towards milestones

Project milestones were articulated in the C-ROER4D Memorandum of Grant Conditions. All C-ROER4D milestones and contracted deliverables will be met, including delivery of technical and financial reports, which are due on 30 June 2018 and 30 days thereafter, respectively (Table 1).

Table 1: Progress towards milestones

Milestone	Due date	Status
Commencement date	1 January 2018	Completed
Initial payment	9 November 2017	Received
Final technical report	30 June 2018	Submitted in this document
Final financial report	30 July 2018	In progress
Contract completion	30 Sep 2018	In progress

Details on how intended milestones from objectives were met are presented in the “Project outcomes” section below.

Project outcomes

In this section, project outcomes are presented according to the project’s key objectives.

Project objectives

The general objective of the project was *to promote evidence-based educational policy and practice change through leveraging ROER4D project outputs and outcomes*.

The specific objectives were to:

- (1) to inform policy-makers, practitioners and researchers of ROER4D research findings and meta-synthesis;
- (2) to advance field-building activities with respect to open education and open research through targeted publications and activities; and
- (3) to establish a policy relevant research agenda on the relationship between open education and social justice, with a focus on gender.

All project objectives were aligned with an open access publishing strategy and open research ethos in order to optimise the potential for development impact and to ensure the accessibility of project outputs for a global audience.

Project activities and related outcomes

Research-to-policy

Contributing to specific objective 1: To inform policy-makers, practitioners and researchers of ROER4D research findings and meta-synthesis.

International policy engagement

United Nations Educational, Scientific and Cultural Organization (UNESCO) Open Educational Resources (OER) Chair: The C-ROER4D PI was again invited to apply for a UNESCO OER Chair and submitted the application on 30 April. The application was

endorsed and presented by Prof. Mamokgethi Phakeng, UCT Deputy Vice-Chancellor and Vice-Chancellor Elect, and supported by Mr Carlton Mukwevho, Secretary-General of the South African National Commission for UNESCO; Associate Professor Suellen Shay, Dean of the Centre for Higher Education and Development (CHED), UCT; Dr Matthew Smith of the IDRC; Prof. Rory McGreal, OER Chair, Athabasca University; Prof. Martin Weller, OER Chair, Open University; and Prof. Tel Amiel, OER Chair, University of Brasília. The outcome of the UNESCO selection process was not yet announced at the time of writing this report.

UNESCO OER Plan: Following the 2nd World OER Congress in Slovenia in September 2017, CILT staff and the C-ROER4D team were invited to contribute to the UNESCO OER Plan. The detailed feedback sent on 1 June 2018 was acknowledged by Gašper Hrastelj from the Slovenian National Commission for UNESCO.

Advisory Panel for UNESCO-COL OER Policy Development: The PI was invited to participate on a panel to advise on the international UNESCO-Commonwealth of Learning (COL) OER policy development process. Deputy PI, Dr Glenda Cox, submitted comments on early drafts. This process is ongoing and will continue for the rest of 2018.

Engagement with Creative Commons: The PI has shared the key ROER4D findings on the comparative rarity of instructors in the Global South formally sharing teaching materials under an open licence (such as Creative Commons) with Dr Cable Green, Director of Open Education and Mr Simeon Oriko, Network Team Manager at Creative Commons who agreed to distribute the ROER4D findings within Africa in particular.

Policy brief: Building on the first ROER4D policy publication, “Spotlight on OER policy in the Global South”¹, which highlighted several case studies from sub-projects in Colombia, South Africa (SA), Afghanistan and Mongolia, the C-ROER4D team has drafted a more action-oriented policy brief that provides clear recommendations for OER policy activities in the Global South. This draft will be finalised by the end of July 2018, once it has been circulated for comment to stakeholders. The policy brief will have an accompanying PowerPoint presentation, as requested by COL.

National policy engagement

Engagement with the Department of Higher Education and Training (DHET): ROER4D was approached by the Chief Director (Social Inclusion, Equity, Access and Quality), Ms Trudi van Wyk for advice on a range of open education-related activities. A meeting was held on 7 March 2018 at CILT with Ms van Wyk, Mr Paul West (Project Manager, Open Learning), Mr Mike Adendorff (Project Manager, College Lecturer Development) and consultant Prof. Philip Uys (Charles Sturt University, Australia). Research findings from ROER4D were shared, advice was provided on locating OER for Technical and Vocational Education and Training colleges, open textbook production and researching the readiness of institutions to adopt OER. Further advice has been provided in ongoing email exchanges on supporting young black researchers, open access publishing approaches and the National Open Learning Initiative (due to be launched in December 2018).

¹ <https://zenodo.org/record/844695>

Engagement with University South Africa (USAf): CILT Director, Prof. Laura Czerniewicz, was invited to address the USAf strategy meeting (29 May 2018). The C-ROER4D Curation and Publishing Manager, Michelle Willmers, provided support in preparing the slides on open textbook publishing for this presentation.

Institutional policy engagement

Engagement with senior leadership at UCT: The Deputy Vice-Chancellor (Teaching and Learning), Prof. Lis Lange, officially launched the ROER4D edited volume on 7 March 2018.² Copies of the ROER4D edited volume were also personally presented to the current Vice-Chancellor, Dr Max Price, and Deputy Vice-Chancellor and Vice-Chancellor Elect, Prof. Mamokgethi Phakeng. The Acting Dean of CHED, Prof. Mbulungeni Madiba, addressed the audience at the ROER4D book launch and the PI met separately with the Dean of CHED, Prof. Suellen Shay, to discuss prospects for collaboration on a paper on social justice and OER, in light of her prior research on social justice (Luckett & Shay, 2017).

UCT Open Access Policy review: The UCT Open Access Policy, which references OER, is currently under review. The C-ROER4D PI has provided input in this regard to CILT Director, Prof. Laura Czerniewicz, who is a member of the policy review committee. The review will take place outside the timeframe of the C-ROER4D project.

Engagement with UCT Libraries: The C-ROER4D team has made a concerted effort to strengthen relationships with UCT Libraries, a key strategic partner in promoting open education at UCT. Copies of the ROER4D edited volume were presented in a meeting with the Deputy Director (Information Systems and Resources), Ms Nikki Crowster, and Digital Library Services Manager, Mr Niklas Zimmer Manager. In addition, the former C-ROER4D Project Curator has, as of 1 June 2018, joined the Digital Library Services unit in the role of Data Curation Officer, supporting UCT's strategic engagement with research data management.

Collaboration with Digital Library Services on research data management: The C-ROER4D curation and dissemination team collaborated with UCT Digital Library Services in supporting implementation of the new UCT Research Data Management Policy.³ This engagement, which included email correspondence and face-to-face meetings, resulted in joint participation in the FigShare field trip to UCT⁴ hosted by the international FigShare team, as well as mutual participation at internal UCT seminars and conferences (including the UCT Emerging Researchers seminar series). C-ROER4D supported Digital Library Services in the development of the institutional FigShare research data repository through various consultation sessions in which lessons learned and skills gained in ROER4D curation and dissemination activity were shared. The ROER4D content collection on Zenodo⁵ was also syndicated to the UCT FigShare instance, ZivaHub,⁶ as a means of boosting the institutional open data collection.

² https://www.youtube.com/watch?v=lcsPgyONO_k

³

http://www.digitalservices.lib.uct.ac.za/sites/default/files/image_tool/images/346/TGO_Policy_Research_Data_Management_2018_V6.pdf

⁴ <http://www.digitalservices.lib.uct.ac.za/news/online-info-session-figshare-field-trip-uct>

⁵ <https://zenodo.org/communities/roer4d/?page=1&size=20>

Representation UCT Research Data Management Governance Committee: The PI was approached earlier in 2018 to represent CHED on this university-level committee. The first meeting is scheduled for the 18 July 2018. Lessons from the open data initiative within ROER4D will be shared and applied to a university-wide context.

Publishing and dissemination

Contributing to specific objectives 1 and 2: To inform policy-makers, practitioners and researchers of ROER4D research findings and meta-synthesis; and to advance field-building activities with respect to open education and open research through targeted publications and activities.

Open Research Toolkit

Building on the successes of the ROER4D project's engagement in open research as a guiding principle in its publication and dissemination strategy, the C-ROER4D project published an Open Research Toolkit⁷ profiling the conceptual and other tools used in the meta-synthesis of sub-project findings presented in the project's edited volume, *Adoption and Impact of OER in the Global South*.

The intention behind releasing the four documents comprising the toolkit was to make visible the conceptual and theoretical thinking and processes underpinning the ROER4D meta-synthesis. These aspects of research activity typically remains "invisible" in that they are not part of the scholarship presented in traditional journal articles and book chapters. The project hoped that writing up these various processes and releasing this set of outputs would assist other "open" projects with meta-synthesis ambitions and promote open research practice.

The four outputs published as part of the Open Research Toolkit are:

1. An overview of the development of the meta-synthesis conceptual and analytical frameworks⁸ and their use in the meta-synthesis process.
2. A review of the methodology⁹ used to perform the meta-synthesis analysis.
3. An open data set¹⁰ consisting of the coded excerpts from the sub-project research outputs that informed the meta-synthesis findings.
4. A review of the ROER4D Bibliography¹¹, including key insights derived from its creation and maintenance, and insights around the creation and publication of research on open educational resources that can be inferred from the bibliography.

A limited number of the Open Research Toolkit briefs were printed for dissemination at conferences and other events.

⁶ <https://uct.figshare.com/ROER4D>

⁷ <http://roer4d.org/open-research-toolkit>

⁸ <https://doi.org/10.5281/zenodo.1217423>

⁹ <https://doi.org/10.5281/zenodo.1217420>

¹⁰ <https://datafirst.uct.ac.za/dataportal/index.php/catalog/696>

¹¹ <https://doi.org/10.5281/zenodo.1217231>

Project Activity Toolkit

The ROER4D project was groundbreaking in the context of it being the first large-scale, networked research initiative investigating OER across the Global South. The project was fortunate to have the resourcing to establish the UCT Network Hub, which collectively mounted various areas of activity to deliver on project objectives and disseminate findings. Cognisant of the fact that resource-constrained research projects in the Global South may not have the benefit of expertise in niche areas of project management, communications and publishing activity, the C-ROER4D project undertook to publish a Project Activity Toolkit¹² providing practical details on the five core operational portfolios of the UCT Network Hub in the ROER4D project: networking, evaluation, communications, research capacity development, and curation and dissemination.

The five briefs forming the Project Activity Toolkit are:

- A “Networking”¹³ chapter exploring the concept of networking in the ROER4D project context
- An “Evaluation”¹⁴ chapter detailing how ROER4D employed Utilization-Focused Evaluation to enhance its ability to respond to researchers’ needs in an agile manner
- A “Curation and Dissemination”¹⁵ chapter discussing the processes entailed in ROER4D’s curation and dissemination strategy
- A “Communications”¹⁶ chapter addressing the interrelated nature of the networking, evaluation and communications functions within the project
- A “Research Capacity Development”¹⁷ chapter describing the capacity-building activities undertaken to provide sub-project researchers as well as the UCT Network Hub with the research tools and analytical concepts required to produce a coherent body of empirical knowledge on OER in the Global South.

A limited number of the Project Activity Toolkit chapters were printed for dissemination at conferences and other events.

Spanish translations of edited volume chapters

As part of the C-ROER4D project’s extension and dissemination agenda, the project embarked on a collaboration with the Karisma Foundation in Colombia to translate Chapters 5 and 6 of the ROER4D edited volume into Spanish. The Karisma Foundation, which was the organisational host of the two sub-projects which produced these chapters, oversaw the translation process and profiled the Spanish-language versions in their network. The chapters were integrated into the ROER4D Zenodo collection and profiled in a blog post.

The chapter “Acceso abierto y REA en América Latina: un estudio sobre el panorama de las políticas en Chile, Colombia y Uruguay”¹⁸ (“Open Access and OER in Latin America: A

¹² <http://roer4d.org/project-activity-toolkit>

¹³ <https://doi.org/10.5281/zenodo.1221323>

¹⁴ <https://doi.org/10.5281/zenodo.1221325>

¹⁵ <https://doi.org/10.5281/zenodo.1221327>

¹⁶ <https://doi.org/10.5281/zenodo.1221329>

¹⁷ <https://doi.org/10.5281/zenodo.1221331>

¹⁸ <https://karisma.org.co/descargar/acceso-abierto-y-rea-en-america-latina-un-estudio-sobre-el-panorama-de-las-politicas-en-chile-colombia-y-uruguay/>

survey of the policy landscape in Chile, Colombia and Uruguay”) by Amalia Toledo is available online from Fundación Karisma¹⁹, as is the chapter “Co-creación de REA por parte de profesores y formadores de docentes en Colombia”²⁰ (“Co-creation of OER by teachers and teacher educators in Colombia”) by Sáenz, Hernandez & Hernández.

Open Education Consortium Open Data award

In the C-ROER4D project period, the project received the Open Education Consortium Open Data Award²¹ in the category of “Open Resources, Tools and Practices”. The award recognises “Excellence in an open data initiative. A project demonstrating best practices in making data openly available, accessible and reusable for the public.” A reflection on the award and the ROER4D open data initiative was published as a blog²² on the ROER4D website.

The C-ROER4D curation and dissemination team built upon the research data management activity undertaken in the ROER4D project by publishing the dataset²³ which was generated in the ROER4D meta-synthesis. This brought the total number of open datasets published out of the ROER4D research process to nine: seven²⁴ of which are hosted on the DataFirst website in English and Spanish, and two²⁵ of which are hosted on the Karisma Foundation website in Spanish.

Communications

Contributing to specific objectives 1 and 2: To inform policy-makers, practitioners and researchers of ROER4D research findings and meta-synthesis; and to advance field-building activities with respect to open education and open research through targeted publications and activities.

One of the primary C-ROER4D project aims was to leverage ROER4D through the targeted communication of ROER4D research findings, providing insights and recommendations to policy-makers, practitioners and researchers. The project therefore had an explicit link to, and built upon, ROER4D communications and networking activity.

Edited volume book launch and dissemination of findings

The launch of the ROER4D edited volume, *Adoption and impact of OER in the Global South*, was an important event in terms of profiling the ROER4D project and disseminating findings to an institutional audience (Figure 1). It also provided an opportunity to make the title more visible on social media networks.

¹⁹ <https://karisma.org.co/>

²⁰ <https://karisma.org.co/descargar/co-creacion-de-rea-por-parte-de-profesores-y-formadores-de-docentes-en-colombia/>

²¹ <http://www.oecconsortium.org/2018/03/oec-announces-the-2018-oe-award-winners-of-open-resources-tools-practices/>

²² <http://roer4d.org/3575>

²³ <https://www.datafirst.uct.ac.za/dataportal/index.php/catalog/696>

²⁴ <https://www.datafirst.uct.ac.za/dataportal/index.php/catalog/ROER4D>

²⁵ <https://karisma.org.co/cokrea/?p=1007>

A number of institutional managers and senior academic staff attended the launch event. Guest speakers included UCT Deputy Vice-Chancellor (Teaching and Learning), Prof. Lis Lange, and Acting Dean of CHED, Prof. Mbulungeni Madiba. At the event, Prof. Lange spoke strongly in favour of institutionally-backed open education approaches and highlighted the fundamental issues of access to knowledge and whose knowledge is prioritised in the university.²⁶ In this sense, the book launch constituted an important advocacy moment for advancing the institutional conversation around open education and new forms of knowledge production.

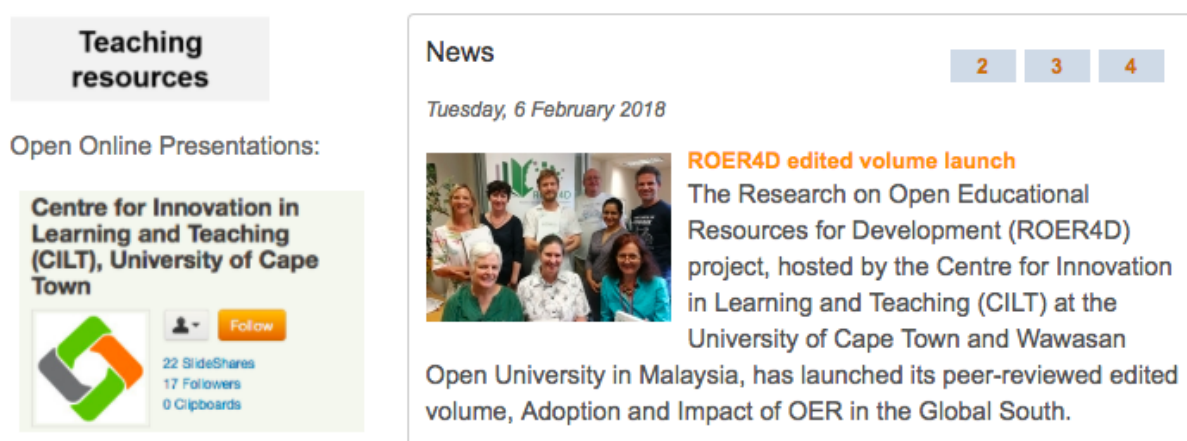


Figure 1: Screenshot of the ROER4D edited volume launch announcement on the CILT website

In order to boost the dissemination of findings, the project published a booklet of chapter abstracts²⁷ as well as a poster summarising project findings.²⁸ The printed copies produced were useful at meetings and conferences and provided a means of making the large body of ROER4D research more accessible to a broad audience.

The Project Activity and Open Research toolkits published in the C-ROER4D period functioned as an additional means of stimulating interest in the ROER4D research process, particularly as relates to the meta-synthesis of sub-project findings. These outputs linked back to the overview and synthesis chapters of the project's edited volume, and were aimed at contributing to field-building in the area of open education research.

The edited volume could be easily located and downloaded through multiple online channels free of charge under a Creative Commons Attribution licence. The main online platforms hosting the book were: the African Minds (Figure 2) and IDRC publisher websites; the ROER4D website; Zenodo, ZivaHub and Open UCT repositories; and Amazon.com. At the time of writing, there had been 1 830 downloads from the African Minds website and 222 downloads from the IDRC site.

²⁶ A video of Prof. Lange's address is available at:
https://www.youtube.com/watch?v=lcsPgYONO_k&feature=youtu.be

²⁷ <https://zenodo.org/record/1195881#.WzSVq9gzaCQ>

²⁸ <https://zenodo.org/record/1209083#.WzSWBdgzaCQ>

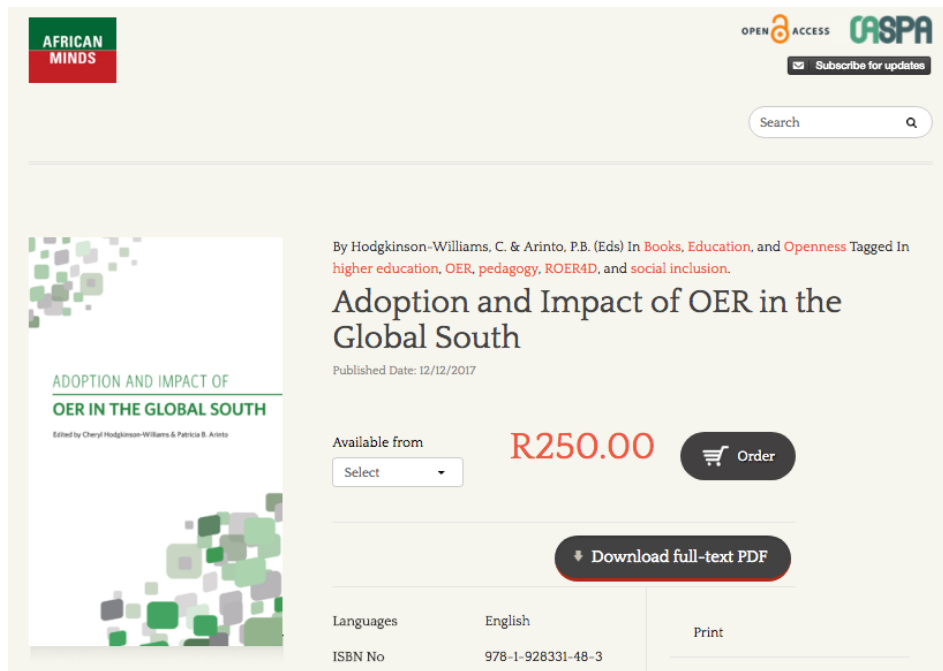


Figure 2: Screenshot of the ROER4D edited volume homepage on the African Minds website

The Publishing and Curation Manager worked with the co-publishers of the ROER4D edited volume, African Minds and the IDRC, to distribute copies of the book to mailing lists and generate e-book versions of the content. The book was made available for sale via a print-on-demand basis through Amazon.com²⁹ and distributed to the African Minds library distribution list. A letter of thanks from the University of Lagos Library can be viewed in Appendix 1.

All edited volume contributing authors received a complimentary printed copy of the book via courier or registered post. In many instances, these copies were donated by authors to resource centres or libraries, thereby enhancing the reach of the publication.

The Publishing and Curation Manager, in collaboration with the PI, engaged a number of academic journals with regards to publication of an independent review of the edited volume. The title is currently being reviewed by the *Journal of Interactive Media in Education* for 2019 publication.

Social media channels were also leveraged to profile the book and its constituent chapters. The project designed a social media campaign for roll-out in the period March to May 2018, in which all chapters were profiled with short accompanying blogs, which were promoted via Facebook and Twitter channels, as well as the project website and newsletter.

²⁹ https://www.amazon.com/Adoption-impact-OER-Global-South-ebook/dp/B07B7F3HVW/ref=sr_1_1?ie=UTF8&qid=1530107903&sr=8-1&keywords=adoption+and+impact+of+oer+in+the+global+south

Social media engagement

The strong ROER4D Twitter and Facebook presence established by the ROER4D Communications Advisor was leveraged in C-ROER4D activity. The traction gained via these social media accounts, which were managed collectively within the C-ROER4D team, was complemented by individual team members' efforts in communicating about the project through personal networks and their individual social media accounts. In this sense, the project's social media efforts derived strongly from the investment made in establishing personal networks in previous open education research and implementation initiatives.

Twitter was one of the project's most important social media platforms in terms of dissemination and network building. ROER4D, and by extension C-ROER4D, participated in a dynamic Twitter community, gathering 1 269³⁰ followers in the course of project activity. This network was complemented by the PI's Twitter account, which had 833 followers at the time of writing. As the "ROER4D" brand was so strong and because C-ROER4D was communicating the ROER4D research there was not a separate C-ROER4D account.

The 147 tweets from the PI and project accounts in the six-month C-ROER4D project period produced a total of 134 194 "Tweet impressions", with 338 mentions (for both accounts). The ROER4D and PI accounts gained a total of 152 new followers in the C-ROER4D project period. Other than the *number* of users reached and new followers gained, the significance of C-/ROER4D Twitter interaction lies largely in the prominence of the other Twitter users the project engaged. ROER4D Twitter followers included the IDRC, Information and Networks in Asia and Sub-Saharan Africa (INASSA), the UK Department for International Development, Commonwealth of Learning (COL), Mike Trucano (World Bank), Open Education Research Hub, OER World Map, Open Educational Practices Scotland, Cable Green, BCcampus, Council of Higher Education South Africa, African Virtual University, OER Africa, Australasian Open Access Strategy Group, Creative Commons Uruguay, Agricultural Research Service Scientists of India, Youth-led development agency in post-war Sierra Leone, Asha Kanwar, Universitat Oberta de Catalunya (UOC) UNESCO Chair, Mellon Educate SA, James GlapaGrossklag, Andy Nobes, Bakary Diallo, Leslie Chan, Patricia Schlicht, Nicole Allen, Patrick Blessinger, TJ Bliss, Robin de Rosa, Wayne MacKintosh, Barbara Chow, Martin Weller, Tel Amiel and many more open scholars from around the globe.



Facebook was also an important communication channel for the project. The "Communications" chapter in the Project Activity Toolkit highlights the fact that an analysis of Twitter activity in the ROER4D project suggested that Twitter activity was mainly attracting Global North audiences, and that Facebook was more effective as a means of engaging Global South audiences (Walji, 2018).

³⁰ The Twitter data presented here were sourced directly from the Twitter platform on 28 June 2018. <https://twitter.com/roer4d?lang=en> and <https://twitter.com/cherylhw?lang=en>

The 37 Facebook posts in the six-month C-ROER4D project period reached 720 other Facebook users.³¹ Figure 3 shows the top four Facebook posts in the C-ROER4D period with associated number of users reached. Of the top four posts, three relate to the release of edited volume chapters, and one relates to the ten-year anniversary of the signing of the Cape Town Open Education Declaration.

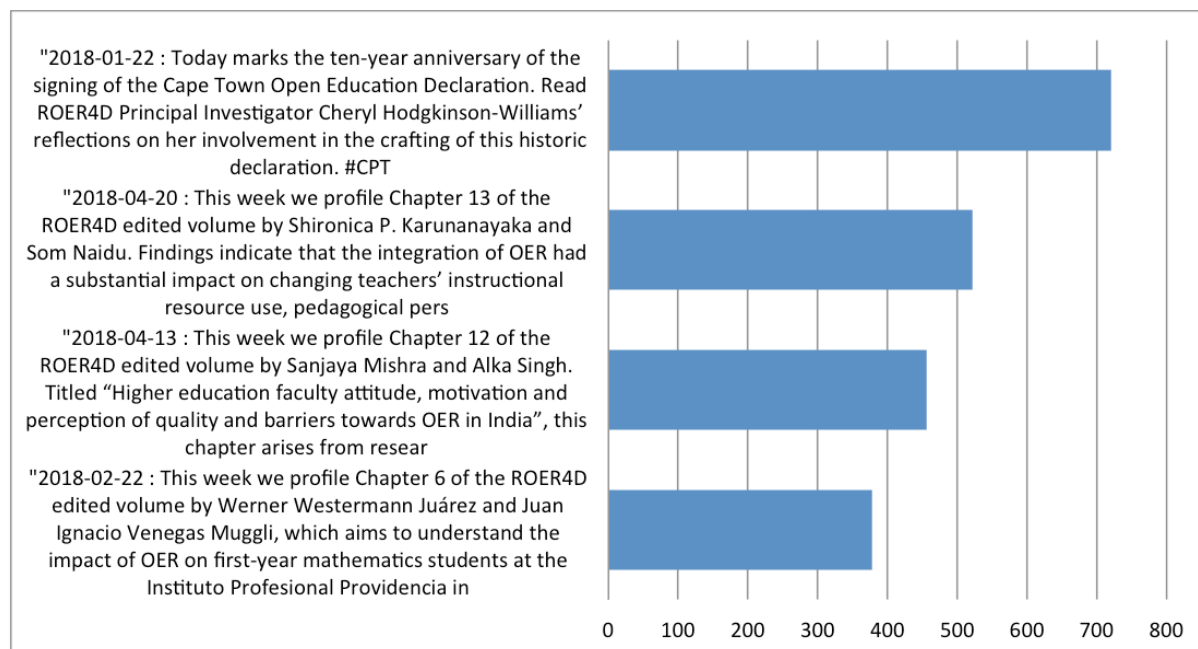


Figure 3: Top four Facebook posts in the C-ROER4D project period in terms of followers reached (Source: Facebook, 28 June 2018)

In addition to Twitter and Facebook, the project utilised its website blog and email newsletter as a means of communicating findings, profiling ongoing work and contributing to the online conversation around open education.

All 85 blogs written during the ROER4D and C-ROER4D project periods were archived in one document³² and published as part of the project content collection.

Conferencing and seminars

The "Networking" chapter (Goodier & Hodgkinson-Williams, 2018) in the Project Activity Toolkit demonstrates the value the project derived from investing in conferencing activity. Building on the strong conferencing and webinar presence established in the ROER4D project, the C-ROER4D team participated in a number of conferences. Highlights included OER18 in Bristol, where Glenda Cox and Henry Trotter delivered presentations^{33,34} and

³¹ The Facebook data presented here were sourced directly from the Facebook platform on 28 June 2018.

³² <https://zenodo.org/record/1293309#.WzXqZlr-vIU>

³³ <https://www.slideshare.net/ROER4D/oer-18>

³⁴ https://www.slideshare.net/ROER4D?utm_campaign=profiletracking&utm_medium=sssite&utm_source=ssslideview

Cheryl Hodgkinson-Williams participated in a #BreakOpen “Provocation”.³⁵ The project also had a presence at Open Education Global 2018 in Delft, where Henry Trotter delivered a presentation³⁶ and Glenda Cox presented a poster³⁷ on project findings.

The Curation and Dissemination team contributed to a number of institutional and international seminars and presentations during the C-ROER4D period, with the following main highlights:

- Michelle Willmers participated remotely in a panel discussion on building human capital and institutional capabilities in the Organisation for Economic Co-operation and Development “Towards New Principles for Enhanced Access to Public Data for Science, Technology and Innovation” workshop, held in Paris in March 2018.
- Thomas King presented at UCT’s Emerging Researcher Programme on open data sharing concerns, techniques/processes and tools in March 2018.
- Michelle Willmers and Thomas King participated a e/merge Africa project webinar on research data management in March 2018.
- Michelle Willmers and Thomas King presented on the ROER4D open data initiative in a FigShare “Field Trip” event hosted by the UCT’s Digital Library Services in March 2018.

As part of the process of scoping further research and future collaboration, Glenda Cox attended the South Africa-Sweden University Forums’s Research and Innovation Week³⁸ in May 2018, where she delivered a presentation on the theme “Transforming higher education curricula”. Dr Anne Algers from

Future conferencing engagements focused on profiling ROER4D findings include the 13th International Conference on e-Learning in Cape Town in July, where PI Cheryl Hodgkinson-Williams will be delivering a keynote address; and the 15th Annual Open Education Conference in Niagara Falls, where Cheryl Hodgkinson-Williams and Glenda Cox will be delivering two separate presentations.

Knowledge building

The C-ROER4D project further developed the knowledge building agenda established in the ROER4D project. Within this context, there was a significant focus on developing new publishing opportunities to disseminate ROER4D findings and communicate the policy insights gained in the C-ROER4D period.

One of the highlights in the project’s knowledge building activity was the fact that Henry Trotter and Glenda Cox were awarded the Global OER Graduate Network (GO-GN) Award for Best Open Education Research Paper³⁹ for their article, “Institutional culture and OER policy: How structure, culture and agency mediate OER policy potential in South African universities”, which was published in the *International Review of Research in Open and*

³⁵

<https://docs.google.com/document/d/1iez2uLemvEeCTDH3RXcOuq5kHoTyYZKgBzevktBNJX8/edit#heading=h.u9r62sbkuhae>

³⁶ <https://www.slideshare.net/ROER4D/oe-global-presentation>

³⁷ <https://zenodo.org/record/1209083#.WzTKzNgzaCQ>

³⁸ <https://sasufblog.wordpress.com/south-africa-2018/>

³⁹ <https://go-gn.net/go-gn/2018-go-gn-award-winners/>

Distributed Learning.⁴⁰ The paper includes data from ROER4D Sub-project 4 and employs the institutional culture conceptual framework developed in that sub-project's research process.



GO-GN is a network of PhD candidates around the world whose research projects include a focus on open education. These doctoral researchers are at the centre of the international open education research network, and include over 200 experts, supervisors, mentors and interested parties connected in a community of practice. The network was started in 2013 by Fred Mulder, UNESCO Chair in OER at the Dutch Open Universiteit, in collaboration with Rory McGreal, UNESCO/COL Chair in OER at Athabasca University in Canada.

The Designing Evaluation and Communication for Impact (DECI-2) team were mentors for the Evaluation and Communication activities in ROER4D. In February 2018 DECI-2 released a case study on the ROER4D project as an exemplar of how Utilization-Focused Evaluation and Research Communication can help design strategies to apply research findings in Open Education (Dhewa, Quarry, Ramírez & Brodhead, 2018).

Knowledge building activities based on ROER4D findings will continue beyond the C-ROER4D project end date, as the team continue to explore future publishing opportunities. Cheryl Hodgkinson-Williams will be presenting on Open Research for a masters group at the Open University, UK on 19 July 2018. In addition, Cheryl Hodgkinson-Williams and Henry Trotter have a chapter on “Degrees of social inclusion: Open educational resources and practices in the Global South” in the book, *Open practices in development: Lessons from research*, which is under review by MIT Press for potential publication in 2019. Insights gained in the C-ROER4D social justice research process will also be presented in an paper, to be submitted in September 2018, which is to be published in the *Journal of Learning for Development*, on invitation from Chief Editor, Anne Gaskell.

Mainstream media dissemination of ROER4D findings

In line with the overarching project ambition to disseminate ROER4D findings to a broad range of stakeholders and audience constituencies, the C-ROER4D project collaborated with the Africa Editor of the University World News website to publish a special issue on OER in the Global South⁴¹ (Figure 4). The special issue, published in February 2018 on both the Africa and International editions of the website, was comprised of an interview⁴² with ROER4D PI Cheryl Hodgkinson-Williams titled “The South joins a global conversation on open education”, as well as three articles by Henry Trotter on ROER4D findings by region. “Opportunities and obstacles for open education”⁴³ presents findings from Africa; “The

⁴⁰ <http://www.irrodl.org/index.php/irrodl/article/view/2523>

⁴¹ <http://www.universityworldnews.com/specialreports/index.php?action=view&report=151>

⁴² <http://www.universityworldnews.com/article.php?story=20180221130314807>

⁴³ <http://www.universityworldnews.com/article.php?story=20180223045114408>

challenge of open and accessible education”⁴⁴ presents findings from South America; and “Diverse responses to open education”⁴⁵ presents findings from Asia.



Figure 4: Screenshot from the University World News interview with ROER4D PI Cheryl Hodgkinson-Williams in their special issue on OER in the Global South

Institutional communication channels and publications

ROER4D and C-ROER4D had an online presence through the CILT website,⁴⁶ the CHED website,⁴⁷ the OpenUCT institutional repository, the DataFirst Data Portal.⁴⁸ ROER4D was mentioned in the *UCT Year in Review 2017*, which was published in 2018.⁴⁹

Gender in open education research

Contributing to specific objective 3: To establish a policy relevant research agenda on the relationship between open education and social justice, with a focus on gender.

Activity 4 of the C-ROER4D project addresses the development of a socially inclusive gender-equality focused conceptual framework and methodology that can be employed in future open education research, specifically in a Global South context. The outputs and envisioned outcomes were mostly achieved.

⁴⁴ <http://www.universityworldnews.com/article.php?story=20180223045659684>

⁴⁵ <http://www.universityworldnews.com/article.php?story=20180223050137190>

⁴⁶ <http://www.cilt.uct.ac.za/cilt/special-projects#roer4d>

⁴⁷ <http://www.ched.uct.ac.za/research-open-educational-resources-development-roer4d-project>

⁴⁸ <https://www.datafirst.uct.ac.za/dataportal/index.php/catalog/ROER4D>

⁴⁹ https://www.news.uct.ac.za/images/userfiles/files/yearinreview/UCT_YearInReview_2017.pdf

Final conceptualisation of the framework will continue into the DOT4D project phase in order to finalise the framework for use in future IDRC research. The initial phase of this work has, however, been completed in collaboration with Sarita Ranchod and Sonja Boezak of Under the Rainbow gender consultants. During the process of evaluating the Zaveri (in press) framework presented to the project by the IDRC, it became clear that attempting to analyse ROER4D gender data (essentially a secondary research process in that it was not originally planned for) was a methodologically weak approach. Applying a gender lens or framework in hindsight to data that was collected without the intention of a deeply considered gender equality approach is superficial.

In order to effectively incorporate a gender lens in future open education research work (including the open textbook research agenda), the C-ROER4D project required the input of gender specialists to develop an appropriate conceptual framework and articulate a methodological approach for gathering and analysing data on gender-associated variables.

The first deliverable in the Under the Rainbow gender consultancy was a critical review of the IDRC-commissioned Zaveri gender framework to assess appropriateness and possible gaps for implementation of this as tool for gender-focused open education research in the Global South. Given the fact that the C-ROER4D team were relatively new to the gender discipline, the expertise of specialist gender consultants was considered useful in terms of positioning the Zaveri framework in current gender and feminist discourse. The Under the Rainbow consultants had had some exposure to the field of open access and open education, and worked dynamically with the C-ROER4D team to grow their understanding of this domain, which was relatively new to them.

The consultants recognised that Zaveri's framework utilised a well-researched literature review to inform her framework, which centres around gender equity, including gender asymmetries such as voice, access and participation. Zaveri highlights the issue of understanding power as a central mechanism to advance inclusion and provides questions to guide research. It also includes a useful discussion on the imperatives of curriculum transformation engaging with intersectionality and the hierarchies of exclusion and the oppression of "gatekeepers" to access and participation in higher education.

Zaveri (in press) makes reference to Moser's (1989) framework on gender equity and highlights the crucial awareness of the practical needs of women, such as acquiring skills and access to care. Access and participation in the distribution and consumption of open information are affected by social, cultural, educational and financial limitations. While she emphasises the importance of considering the needs of excluded groups, she does not engage with these needs. In their draft report outlining their critique of the Zaveri framework, the Under the Rainbow consultants suggest an approach that considers "planning, designing, implementing and reviewing the effectiveness of initiatives by deliberately measuring for these factors through baselines and targets".

The consultants point out the fact that the Zaveri gender analysis framework took four main components into consideration: power, questions about barriers, the issue of agency and leadership. They point out the following four main points of critique:

1. Zaveri does not present a practical framework or tool for an inclusive, gender equitable and intersectional open education research for a development agenda.
2. The case studies in Zaveri's research are limited and based on secondary research.
3. There is a lack of an unambiguous feminist approach; a preferred approach would be a feminist approach rooted in intersectionality.
4. The proposed framework does not provide a clear methodological approach.

The consultants therefore suggest a framework that includes the multi-dimensional realities of exclusion, which requires going beyond a numerical change-based approach to transformation. They argue that inclusion or gender equity does not necessarily lead to equality of opportunity, and that the cycle of exclusion can be perpetuated. Access also needs to be problematized. They point out in their draft report that “in the same way that equity does not necessarily result in equal opportunities, open access does not necessarily lead to participation”. They argue that although a gender lens gives insight into socio-economic, sociocultural and sociopolitical dynamics, an intersectionality approach will provide a “more nuanced understanding of discrimination, oppression and what needs to be considered and done to achieve gender justice”.

Ranchod and Boezak then proceed to discuss the elements they feel are missing in Zaveri's framework and why these missing aspects may be useful concepts to include in a future framework. An intersectionality approach allows the researcher to examine ‘connected structures of oppression (such as sexism, racism and ableism), therefore recognising the socially constructed realities of exclusion.

In South Africa, the debate around decolonisation of curriculum and whose knowledge is foregrounded is highly pertinent in the higher education transformation agenda. An authentically intersectional framework must therefore include a lens to examine epistemological blindness and a continued use of texts from the Global North. The student voice is still marginalised and needs to be included in debates around African scholarship, and also more broadly across the Global North. Decolonisation should include gender dimensions (mostly excluded to date in the literature) and consider an intersectional approach that takes cognisance of gender, race, class, ability and language literacy. This is an evolution from the traditional approach in which transformation has been interpreted as a game of numbers to rectify past imbalances. Addressing quotas has its place, but decolonisation also needs to include a change of institutional culture.

The Under the Rainbow consultants conclude that information and communication technologies exist within established frameworks; simply making materials openly accessible does not obliterate the political, economic and cultural constraints that exist.

In addition to critiquing the Zaveri framework, the gender consultants were asked to articulate a refined conceptual framework for implementing open education research. Their draft document on how an intersectional approach (including gender) can be used in open education was being circulated for review at the time of writing, and will continue to be developed for implementation. The consultants' proposed framework uses an explicitly feminist approach and presents a methodology for implementation of a gender lens in future open education research.

In summary, the core determinant of the proposed analytical framework is power, which can be used to include or exclude access to knowledge. In the Under the Rainbow analytical framework there are three domains of exclusion: structural/systemic, institutional and socio-political (Figure 5).

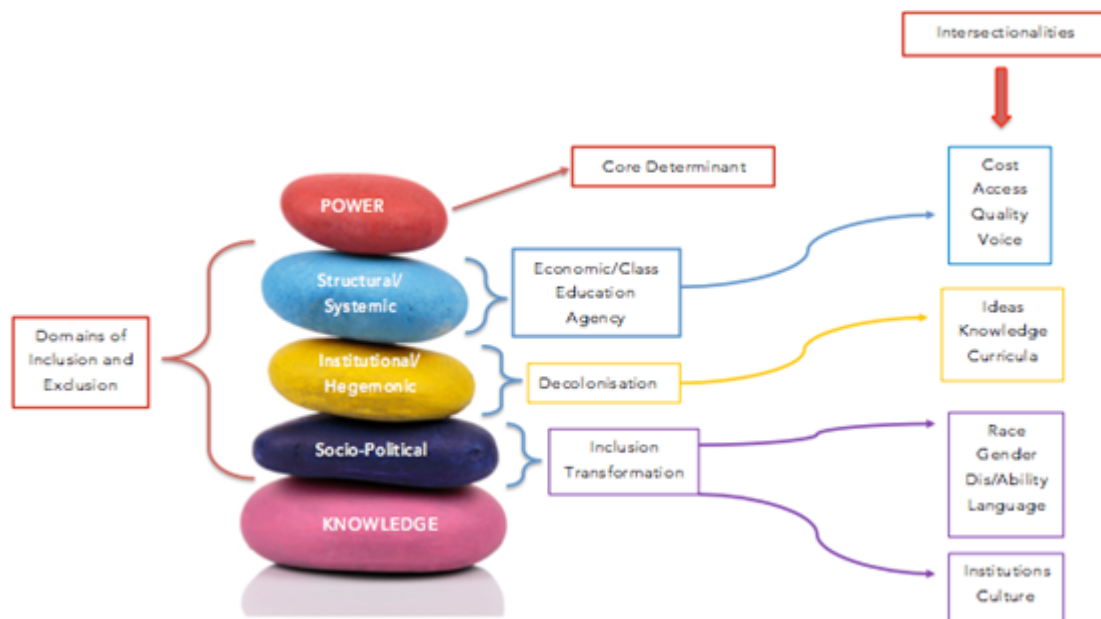


Figure 5: Under the Rainbow gender consultants' domains of inclusion and exclusion in their proposed intersectional analytical framework

These domains are mapped to core framing concepts. For example, the Institutional power domain is mapped to decolonisation which in term encompasses the concepts of “ideas, knowledge and curricula”. It is not always that clear how these concepts are linked and the line of argument is not always present. However, it is clear from discussion with the consultants that considerable deliberation informed these ideas. The draft document in which these concepts are presented will be strengthened with feedback from the C-ROER4D PI and the IDRC. Further work in the DOT4D project will examine and analyse these constructs in order to deepen the framework and align all its components.

The Under the Rainbow analytical framework provides a series of questions that could potentially be used for researching open education contexts and cases. The questions could be tailored to focus on specific areas of concern. Although, as the consultants argue, there is also an overlap between the various domains of power and researchers who employ this framework can argue for the use of concepts.

The Under the Rainbow consultants authored a reflective blog⁵⁰ on the process of considering a gender/intersectional approach to open education research. Work in this area is ongoing.

⁵⁰ <http://roer4d.org/3744>

Social justice theoretical framing

Building on the final chapter in the ROER4D edited volume (Arinto, Hodgkinson-Williams & Trotter, 2017) and the chapter written for the Smith and Seward volume on open development (Trotter & Hodgkinson-Williams, in press), the PI speculated that, rather than merely focusing on how OER might shape social inclusion (a broad concept incorporating access, participation and empowerment), C-ROER4D research should try to understand how OER can contribute to the more politically powerful and relevant concept of social justice for authentically transforming education in inequitable contexts. These musings were strengthened by the work of Leibowitz and Bozalek (2016), as well as Luckett and Shay's (2017) writing about transforming the curriculum in South Africa. Using the concepts employed by political philosopher Nancy Fraser (2005) – which breaks social justice down into its economic, cultural and political components – Luckett and Shay (2017) speculate that some of the well-intentioned curriculum changes in the South African higher education landscape have been merely “affirmative” in their effects, but not “transformational”; meaning that they have ameliorated educational injustices, but not genuinely transformed them.

When the PI was asked to participate in “Provocation” which would be presented at three international conferences in 2018, she chose to stimulate debate by writing a short blog entitled: “When social inclusion doesn't go far enough: concerns for the future of the OER movement in the Global South”.⁵¹ This provocation (part one of three) has already been debated at the OER18 Conference in Bristol and the OEGlobal 2018 Conference in Delft. It will have another outing at OpenEd2018 in Niagara Falls, New York, in October 2018.

The positive response to the Provocation suggested that social justice might be a useful conceptual framing for the UNESCO Open Education Chair application submitted on 30 April 2018 and the DOT4D proposal submitted to the IDRC in May 2018. In addition, the PI has been invited to submit a paper to the Commonwealth of Learning's *Journal of Learning for Development* in September 2018 and will also present findings of the ROER4D project through Fraser's social justice lens at the OpenEd2018 in October 2018. Researcher Henry Trotter and the PI have been working together on elaborating a conceptualisation of a social justice framework for open education⁵² and mapping ROER4D's data to Fraser's (2005) social justice conceptual framework to inform the paper and presentation. The draft of this document was shared with IDRC Senior Programme Officer Dr Matthew Smith on 21 June 2018.⁵³

New project proposal

Contributing to specific objectives 2 and 3: To advance field-building activities with respect to open education and open research through targeted publications and activities; and to establish a policy relevant research agenda on the relationship between open education and social justice, with a focus on gender.

⁵¹ <https://towards-openness.org/workshop/provocation-for-breakopen-by-cheryl-hodgkinson-williams/>

⁵² <https://docs.google.com/document/d/1X17-ZP7KaMG9hYX6eOfHtYNECWmapFHhcOPJRn2Yw5A/edit?usp=sharing>

⁵³ https://docs.google.com/document/d/15CCWx_3htOBrZWq9s2mJHr_PPFLn6NptqDbPmxSPg/edit?usp=sharing

One of the primary deliverables of the C-ROER4D project was the scoping and proposal development for a future project which would build on ROER4D research, harness collaborations established in the ROER4D and C-ROER4D phases of project activity, and further address research-to-policy advocacy work.

UCT, like many other South African universities, is grappling with how to respond meaningfully and creatively to the call for more relevant curricula and pedagogies. Added to the imperative of curriculum transformation, the cost of textbooks is increasingly prohibitive. The #RhodesMustFall and #FeesMustFall political movements encapsulate this complex set of interrelated challenges, calling for both cultural recognition and socio-economic redistribution. The C-ROER4D chose to focus on this pressing socio-political issue as the primary focus for its proposal development focus, linking imperatives around decolonisation of the higher education curriculum and open textbook publishing.

In the course of the C-ROER4D project, the team collaborated with institutional and external stakeholders to scope a project focused on open textbook production as a crucial area of investigation in terms of pursuing a more socially just approach to the provision of teaching and learning materials. The result was the formulation of the DOT4D project, which aims to investigate the current ecosystem of open textbook publishing activity at one South African university (UCT) and provide implementation support in open textbook publishing activity. It also aims to support policy-makers and other stakeholders in the development of institutional and national policy frameworks that govern open textbook publishing activity and address long-term sustainability mechanism. Located in CILT at UCT, the project aims to contribute a developing-country perspective on the global debate around open textbook publishing.

The iterative proposal writing process took more time than envisaged, but the successful outcome has enabled the team to leverage and build upon the open education agenda established in ROER4D. The project starts from 1 July 2018 until 31 December 2020. Figure 6 provides an overview of the main activities which will comprise the DOT4D project.

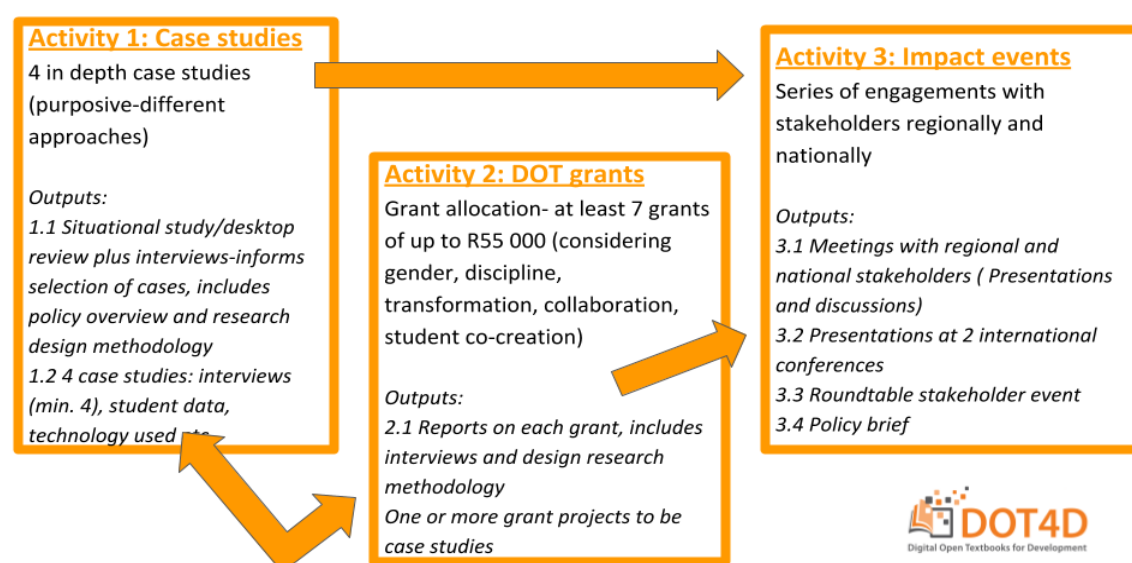


Figure 6: Overview of DOT4D activities

Methodology

The project approach or methodology employed in C-ROER4D activity was based on models and practices associated with “research uptake” (UKAid, 2016) and the “Communications”⁵⁴ chapter in the C-ROER4D Project Activity Toolkit. In this sense, the project linked intrinsically to the preceding ROER4D project, as its aim was to leverage the investment made in generating a body of scholarship on OER in the Global South. The ROER4D project concluded in December 2017 with the publication of the edited volume, *Adoption and Impact of OER in the Global South*, and the full grant period was utilised for undertaking and then writing up sub-project research in order for a meta-synthesis to be undertaken. These tight timeframes did not allow any time for leveraging the substantial investment made in the project and communicating findings to the stakeholder cohort established in the course of project activity.

The C-ROER4D team extended the list of key stakeholders (Table 2) identified in the ROER4D project and targeted specific international organisations (e.g. UNESCO, COL, World Bank, Creative Commons, World Intellectual Property Organization [WIPO]), regional organisations (e.g. UNESCO regional office), national organisations in South Africa (e.g. DHET, Department of Basic Education [DBE], USAf) and institutional leaders (e.g. UCT Vice-Chancellor, UCT Deputy Vice-Chancellors, UCT Deans, UCT Libraries senior management). In most cases, members of the C-ROER4D team were able to make meaningful contact with these key stakeholders, but there were some exceptions (such as in the case of the UNESCO regional office and DBE) or some partial successes (e.g. WIPO). With respect to the latter, C-ROER4D was invited to attend the WIPO-WTO Colloquium for Intellectual Property Teachers and Researchers in Africa in Pretoria⁵⁵ from 9-12 in April 2018. Henry Trotter was earmarked to attend and ROER4D submitted a proposal⁵⁶ for one of the days. Although the proposal was accepted and a full travel scholarship offered, WIPO would only agree to have him being present if he stayed for the full four days, which Henry Trotter was unable to do due to other conferencing commitments.

Additionally, the team was alert to unanticipated opportunities and two “policy windows” at UCT have been (and will continue to be) leveraged to further the open education agenda. The first was the new Research Data Management Policy and the second will be the review of the Open Access Policy which includes the contribution of OER. The PI also took advantage of her role as alternate representative on the Library Committee to deliberate open education and open data policies and procedures, and accepted the request to represent CHED on the UCT Research Data Management Governance Committee.

The C-ROER4D team took the process of curation very seriously and sought to document project activity on a range of platforms. Certain platforms were appropriated for internal communication and document archiving, such as the use of Google Docs for weekly Team meeting minutes; which a number of platforms were utilised to facilitate external

⁵⁴ <https://zenodo.org/record/1221329#.WzXjFcJIQUk>

⁵⁵ https://welc.wipo.int/uploads/IPCOL_AFRICA_2018.pdf

⁵⁶ https://docs.google.com/document/d/1KiO1Sz7TIVoD_Vq3HK1lpuzBelulaRSNNakqipGyell/edit?usp=sharing

communication and profiling, such as the DataFirst Data Portal⁵⁷ for publication of open data, and Zenodo⁵⁸, UCT's ZivaHub⁵⁹ and IDRC Connect⁶⁰ repositories for aggregating and profiling the ROER4D collection (Table 2).

Table 2 : Summary of audiences mapped to communication purposes and channels

Purpose	Audience/Stakeholder group	Communication channel
Knowledge dissemination for policy uptake	<ul style="list-style-type: none"> International and intergovernmental agencies (UNESCO, COL, World Bank, Creative Commons, WIPO) Regional agencies (e.g. UNESCO regional office) National policy makers and organisations in South Africa (DHET, DBE, USAf) Institutional leaders (Vice-Chancellor, Deputy Vice-Chancellors, Deans, Library senior management) 	Primarily face-to-face meetings, individual emails and direct messaging on Twitter
Knowledge dissemination & network-building	<ul style="list-style-type: none"> ROER4D network Educational institutions Teachers and students Learning designers Funders 	Primarily via weekly announcements (MailChimp) blogs which were advertised via Twitter and Facebook
Knowledge dissemination & research capacity development	<ul style="list-style-type: none"> ROER4D network Open Education / OER / OEP / MOOC scholars and researchers 	Primarily via blogs and project and research toolkits which were advertised via Twitter and Facebook. Also conferences, seminars and webinars and individual emails.
Post-project Knowledge dissemination	<ul style="list-style-type: none"> All stakeholders mentioned above 	ROER4D website ROER4D Twitter account (maintained and funded by ROER4D/C-ROER4D) PI.

Key challenges and recommendations

The key challenges emerging from this relatively short-term communications-focused project revolved around: staff continuity changes in transitioning between the original (ROER4D) project and the (C-ROER4D) project; applying a gender lens to OER research after the original data had been collected without a distinctly gendered approach; and assessing the impact of ROER4D research-to-policy activities given the project's short time horizons.

⁵⁷ <https://www.datafirst.uct.ac.za/dataportal/index.php/catalog/ROER4D>

⁵⁸ <https://zenodo.org/communities/roer4d/?page=1&size=20>

⁵⁹ <https://uct.figshare.com/ROER4D>

⁶⁰ <https://www.idrc.ca/en/resources/resources-idrc-grantees/idrc-connect>

Staff continuity challenges

Given that C-ROER4D was unable to secure the services of the ROER4D Communications Advisor, due in part to the gap between the end of her contract with ROER4D in October 2017 and the commencement of C-ROER4D in January 2018, the team decided that the project knowledge required to promote the ROER4D findings would take a new person so long to master that it might be best for the team to share the communications function. To coordinate these activities, the entire team contributed over the period of the project to developing blogs, tweets and Facebook posts in internal staging documents before public release. While this did mean that engagements with journal editors, books reviewers, conference delegates, Twitter and Facebook were directly targeted to particular individuals and groups, gathering of data on the reach of communications activities was more tricky and time-consuming to co-ordinate.

Recommendation: For a future short-term, follow-on, communications-focused project, it would be ideal to secure the services of a specialist Communications Advisor who was part of the prior project in order to leverage network knowledge and technical expertise.

Challenges around retrospective gender analysis

The C-ROER4D mandate included an important gender component, which sought to examine ROER4D data through a gender lens. This proved difficult, as the original data typically did not focus on the relationship between gender and OER adoption. Finding meaningful data to put forth a gender perspective was therefore highly challenging. In addition, because none of the members of the C-ROER4D team were gender specialists, they felt that it was necessary to hire external gender experts to complete this work. This team of gender specialists offered an incisive critique of an existing framework for analysing gender and higher education, suggesting that a more rigorous approach would foreground intersectionality and more recent feminist theories. Due to time constraints and the steep learning curve in engaging in an entirely new disciplines, some of the originally envisioned work could not be completed in the mandated timeframes.

Recommendation: A gender focus would have ideally been present in the original ROER4D project in order for it to be leveraged in a short-term communications-focused project such as C-ROER4D. Future research will include specific conceptual framework/s and associated research designs to better understand intersectionality and open education.

Challenges in assessing impact of research-to-policy activity

As this report demonstrates, the C-ROER4D project engaged in a number of activities to disseminate ROER4D findings to policy-makers and key stakeholders in an attempt to make them aware of the valuable insights that emerged from this research. The team provided feedback on open education policy documents from international organisations such as UNESCO, COL and Creative Commons; it engaged with national South African education policy proposals, sharing insights from ROER4D's experience and knowledge; and it contributed at an institutional level at UCT, engaging with senior leadership and the library

around incorporating OER into the institutional learning landscape. The development of policy does, however, typically happen over the long term and it is therefore not always clear in the interim how or whether a project's interventions have been successful. As one of many voices in these varied educational policy contexts, the team understood that it might not be able to determine the full extent of any organisation's or government's approach to open education, but with the solid research background that its recommendations were based upon, it did so from a position of confidence. The team will likely only become aware of any research-to-policy influence in the coming years.

Recommendations: The time lag in assessing the value of a project's success in influencing policy is unlikely to change given the time horizon of funded projects versus the development of governmental or organisational policies. The project therefore encourages funders to continue to support explicit research-to-policy efforts by the projects they fund based on the premise that only those projects that place a formal emphasis on such activity are likely to influence policy in the long-term.

Concluding thoughts on ROER4D's impact

ROER4D's impact on the open community

One of the final face-to-face communications activities that the project engaged in was as live presenters and virtual participants at the OER18 Conference in Bristol, UK, and the Open Education Global Conference in Delft, The Netherlands, both in April 2018. Glenda Cox and Henry Trotter gave presentations at the conferences, while Cheryl Hodgkinson-Williams also participated in a special "virtually connected" session.

What became quite clear to the team during the two conferences was how well-known and reputable ROER4D was in the minds of the other conference delegates, most of whom were from the Global North. Not only did delegates quickly take copies of the various ROER4D publications available, but a number of presenters referred the work of ROER4D in their own presentations, highlighting the project as an example of high-quality research from the Global South that they utilised in thinking through their own research. For instance, in a presentation on "Assessing the impact of a global health MOOC/OER", Sally Parsley, Astrid Leck and Daksha Patel of the London School of Hygiene and Tropical Medicine drew on research from ROER4D's edited volume and used Cox and Trotter's sub-project research (specifically the OER Adoption Pyramid) presented in the project's edited volume.

A number of participants at the conferences sought Cox and Trotter out for conversations on ROER4D, and were keen to engage with the findings discussed in the edited volume. At previous conferences, ROER4D members would often be the ones having to instigate interactions to share their research, but more recently, they have not had to go out of their way to garner attention: open community members have sought them out. This is the result of years of research, networking and communications activity, but it was a culmination that was greatly enhanced by the opportunity to engage in intensive communications work during the six-month C-ROER4D period.

In addition, a number of researchers have expressed an interest in collaborating in future open textbook research, particularly as relates to the DOT4D project. Sanya Mishra and Werner Westermann, Lead Researchers of ROER4D sub-projects 3 and 9, have both sent requests to be considered for future collaboration in this area. This ongoing conversation is indicative of the level of trust and collaboration, as well as the vitality of the network, which was established in ROER4D and extended in the C-ROER4D project.

Valuable additional six months to disseminate ROER4D research

As already mentioned, the visibility of ROER4D research as well as its associated network, was given a major boost by the team being able to continue promotion of findings for six months beyond the publication date of its final edited volume. Some of the team members have participated in projects where this never happened and can attest to the profound difference that this extra “boost” period offers a project to profile its findings and consolidate its position as a project of note within a scholarly community.

Partnership, trust and collaborative ethos in the ROER4D and C-ROER4D projects

Perhaps one of the most outstanding features of the ROER4D and C-ROER4D projects has been the intellectual partnership and collaborative approach established amongst network members. Given the size and diversity of the project network, this was not a trivial feature. There are a number of ongoing conversations around prospects for future collaboration amongst members of the ROER4D network, some of which are focussed on further interrogation of data produced in the ROER4D project. This authentic sense of community and desire to collaborate is a significant success and outcome of the ROER4D and C-ROER4D projects.

In this regard, a particular acknowledgement is due to IDRC Senior Programme Officer Dr Matthew Smith, who managed both the ROER4D and C-ROER4D projects. Dr Smith’s intellectual partnership and compassionate management style was a defining feature of project interactions, which were warm and personable while also being deeply intellectually challenging and stimulating.

Finally, the project owes a great deal of its success to the exceptional leadership skills and management style of the PI, Cheryl Hodgkinson-Williams, who established a culture of openness, compassion, collaboration and intellectual innovation in the project. The ongoing trust and collaboration between ROER4D network members is a direct result of the high standards and supportive ethos established by Cheryl in her role as project PI, which was always focussed on supporting the individual and bringing out the best in network participants. In this sense, she has made a monumental contribution to advancing the open education agenda, particularly as relates to promotion of the Global South voice.

Project outputs

Book chapters

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Appendix 1: University of Lagos acknowledgement of edited volume receipt

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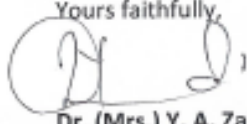
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I hereby acknowledge the receipt of the book "**Adoption and Impact of OER in global South**" received on 16th April, 2018. The book has been found very useful and relevant to my area of research.

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Yours faithfully,

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