

# RESEARCHING OPEN EDUCATIONAL RESOURCES AND OPEN PEDAGOGICAL PRACTICES: THE ROER4D PROJECT

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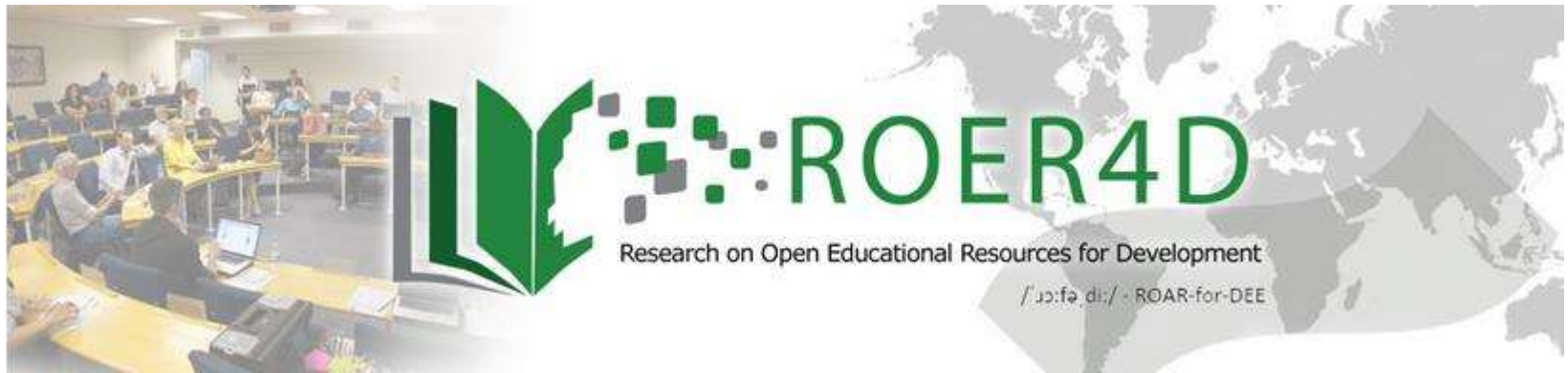


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*IDRC Grant/ Subvention du CRDI: 107311-001-Research into Open Educational Resources for Development*





# Researching Open Educational Resources and Open Pedagogical Practices: The ROER4D Project

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University of Cape Town  
MEd EdTech Seminar  
26 Feb 2016

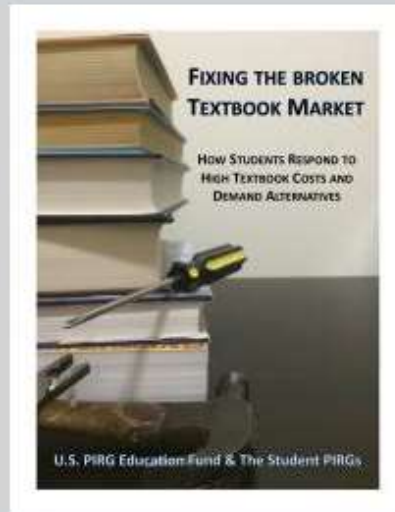




# Key challenges facing education in world-wide

HOME >

## REPORT: AFFORDABLE HIGHER EDUCATION



### FIXING THE BROKEN TEXTBOOK MARKET

RELEASED BY: U.S. PIRG EDUCATION FUND AND  
THE STUDENT PIRGS

RELEASE DATE: MONDAY, JANUARY 27, 2014

> [DOWNLOAD REPORT \(PDF\)](#)

The cost of college textbooks has skyrocketed in recent years. To students and families already struggling to afford high tuition and fees, an additional \$1,200 per year on books and supplies can be the breaking point.

As publishers keep costs high by pumping out new editions and selling books bundled with software, students are forced to forgo book purchases or otherwise undermine their academic progress.



# Key challenges facing education in South Africa

#Feesmustfall protests in Nov 2015 & Feb 2016 in South Africa

- Cost
- Relevance





# Key challenges facing education in Africa



Unemployed youth in  
Nigeria

\*

<http://africajournalismtheworld.com/2014/06/19/nigeria-unemployed-youths-feel-government-programmes-favour-those-with-political-links/>



# Key challenges facing education in developing countries

Education institutions under political & financial pressure

Rising numbers of students in the education sector and limited places in HE

Expensive, limited in number, often outdated textbooks are not entirely relevant to the context

Reduction of educational funding by governments

Employability of graduates



The screenshot shows the website 'THE VIRTUAL UNIVERSITY and e-learning'. The header includes a navigation bar with links: Home IIEP | Contact us, Project Overview, Web Publication, Forums, Links, and Print. The main content area is titled 'Open Educational Resources' and 'Open content for higher education'. It features a section for 'Forum 1 final report' dated February 2006, by Paul Albright, Western Interstate Commission for Higher Education, Colorado, USA. A download link for the report is provided. The page also includes a sidebar with a table of contents for the forum, listing topics such as 'Background and objective of the forum', 'Forum organization', 'An introduction to Open Educational Resources and open course content: the importance and benefits of OER', 'Challenges for OER providers', 'Faculty members and OER', 'Intellectual property and copyright issues', 'Challenges for users of OER', 'Seeking global balance in OER', 'Promoting the OER movement', and 'Next steps'.

← OER Home

Background and objective of the forum

Forum organization

An introduction to Open Educational Resources and open course content: the importance and benefits of OER

Challenges for OER providers

Faculty members and OER

Intellectual property and copyright issues

Challenges for users of OER

Seeking global balance in OER

Promoting the OER movement

Next steps

**Open Educational Resources**  
Open content for higher education

**Forum 1 final report**  
February 2006  
Paul Albright, Western Interstate Commission for Higher Education, Colorado, USA

Download the page (.pdf)

Background and objective of the forum

**Open Educational Resources and open course content - a model for sharing**

Higher education institutions worldwide face significant challenges related to providing increased access, while containing or reducing costs. Meeting increasing and increasingly varied demand for quality higher education is an important consideration in the policy debate and institutional development in many countries. And it is particularly important in the case of developing countries, for whom demand often greatly exceeds capacity in the existing higher education system.

New developments in higher education – from virtual universities and e-learning to open source initiatives – speak to the efforts on the part of the traditional higher education community, as well as new providers, to address this increasing demand. The open source movement can be seen as reflecting the philosophy of academe, which is based upon a



# OER as a response to some educational challenges facing education in developing countries

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## TRENDS

## Finding the sweet spot: open educational resources in the developing world

on December 17, 2012



With debate about the benefits and future of the MOOC dominating the educational blogosphere in the last year, discussions about the open sharing of educational resources are becoming more prevalent. Open Educational Resources, or OERs, offer a potential tool for impacting education in developing countries and fast growing economies, particularly in the emerging technology hubs of Africa. These open, freely available educational resources can provide top education for people who don't have access to universities or education in developing countries, but there is fear that

educational resources created in highly developed countries will be of little use to those in developing countries because of cultural and economic differences.

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[http://www.elearning-africa.com/eLA\\_Newsportal/finding-the-sweet-spot-open-educational-resources-in-the-developing-world/](http://www.elearning-africa.com/eLA_Newsportal/finding-the-sweet-spot-open-educational-resources-in-the-developing-world/)



# What are OER?

- Open educational resources (OER) are **teaching, learning, and research** resources that reside in the **public domain** or have been released under **an intellectual property license** that permits their free use and **re-purposing by others** (e.g. Creative Commons) (adapted from Smith & Casserly 2006: 8).



Free lecture  
notes

Any learner or  
teacher

Free videos



# Open textbooks as a type of OER

## Open textbooks become popular source of affordable content

By [Tara García Mathewson](#) | February 22, 2016  print



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<http://www.educationdive.com/news/open-textbooks-become-popular-source-of-affordable-content/414274/>



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CRDI

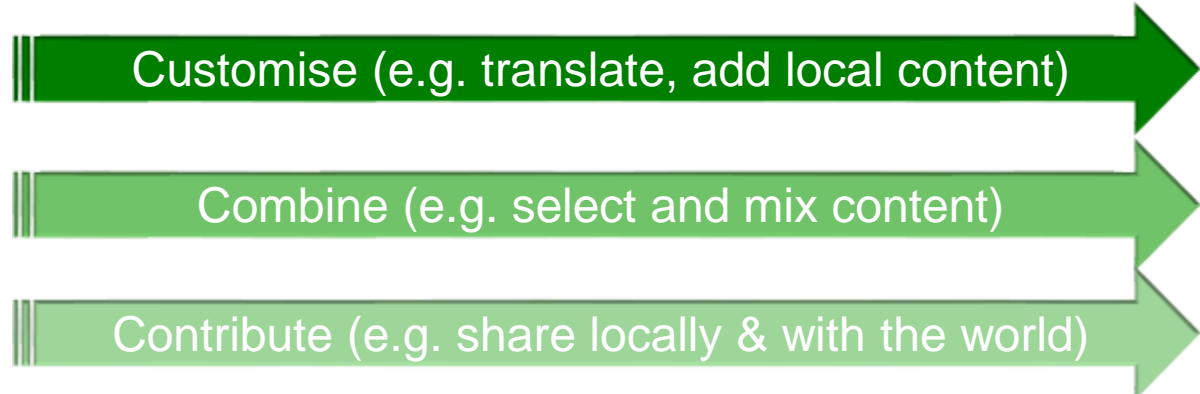









ROER4D  
Research on Open Educational Resources for Development





# OER: Degrees of openness



Copyright	Creative Commons Licences						Public domain
All rights reserved	Attribution Non-commercial No derivatives	Attribution Non-commercial Share Alike	Attribution Non-commercial	Attribution No Derivatives	Attribution Share Alike	Attribution	No rights reserved
							
Suitable file formats	PDF, password protected document file					<u>Wiki</u> , xml, ODF, html	
							
Most restrictive				Most accommodating			
<b>BY</b> = Attribution		<b>NC</b> = Non-commercial		<b>ND</b> = No derivatives		<b>SA</b> = Share Alike	

Hodgkinson-Williams & Gray (2009:110) & Hodgkinson-Williams (2014)



# Examples of OER from Africa (1)

<http://oer.avu.org/>

<http://open.uct.ac.za/>



<http://www.oerafrica.org/>



# Examples of OER from Africa (2)



## Veterinary Open Educational Resources Uniquely African Context

Home About Educational Resources CPD Academic programmes Research News and

Home > open-education-resources >

- >> Partners
- >> Meet the Team
- >> Contribute
- >> Open Educational Resources
  - license
  - USB
  - CDS
  - share
- >> Contact

### Open Education Resources

#### Open Educational Resources (OER)

The Internet and digital technologies are transforming how adaptable and widely available, allowing educational insti

- OER are free and openly licensed educational materi
- OER may freely be used, remixed, and redistributed a
- OER often have a Creative Commons licence that stat

#### Creative Commons licences:

- Help creators to retain copyright while allowing others
- Ensure licensors get the credit for their work they dese
- Serve as the baseline, on top of which licensors can c

<http://www.afrivip.org/open-education-resources>



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Welcome Bienvenue Karibu أهلا وسهلا

TESSA is an international research and development initiative which brings together teachers and teacher educators from across sub-Saharan Africa. It offers a range of materials (Open Educational Resources) in four languages to support school based teacher education and training. For an overview of TESSA and our current developments, please see the [briefing note](#) here. Clicked to your language is more info TESSA en français.

#### Projects



#### Research themes



#### Resource share

Share your materials



#### Forum

Talk to us and others



#### Primary Education Materials

Generic Versions English Français

#### Country specific materials

Select a country...



#### TESSA News

See all news



#### International Women's Day: TESSA Reports

Women and Girls Education in sub-Saharan Africa: Shortcomings, the

Push

Read full story



#### Latest TESSA Newsletter available now

Read full story



#### Commonwealth of Learning Forum 2013

TESSA is represented at the Commonwealth of Learning's Seventh Pan-Commonwealth

Read full story

<http://www.tessafrica.net>



# OER policy in Africa

OER Impact Map uses cookies to ensure that we give you the best experience of our website. If you continue to use this site we will assume that you consent to this.

OK!

This map shows policies around the world which have been established in support of open education. It includes open data from:

- The Creative Commons [OER Policy Registry](#)
- The Policies for OER Uptake ([POERUP](#)) wiki
- The list of OER projects published by Scholarly Publishing and Academic Resources Coalition ([SPARC](#))

Click on the node and title to see the full record including the policy.



<http://oermap.org/policy-map/>



# Slow uptake of OER in Africa

**MIT****OPEN****COURSEWARE**  
MASSACHUSETTS INSTITUTE OF TECHNOLOGY

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## Site Statistics



**World Impact**  
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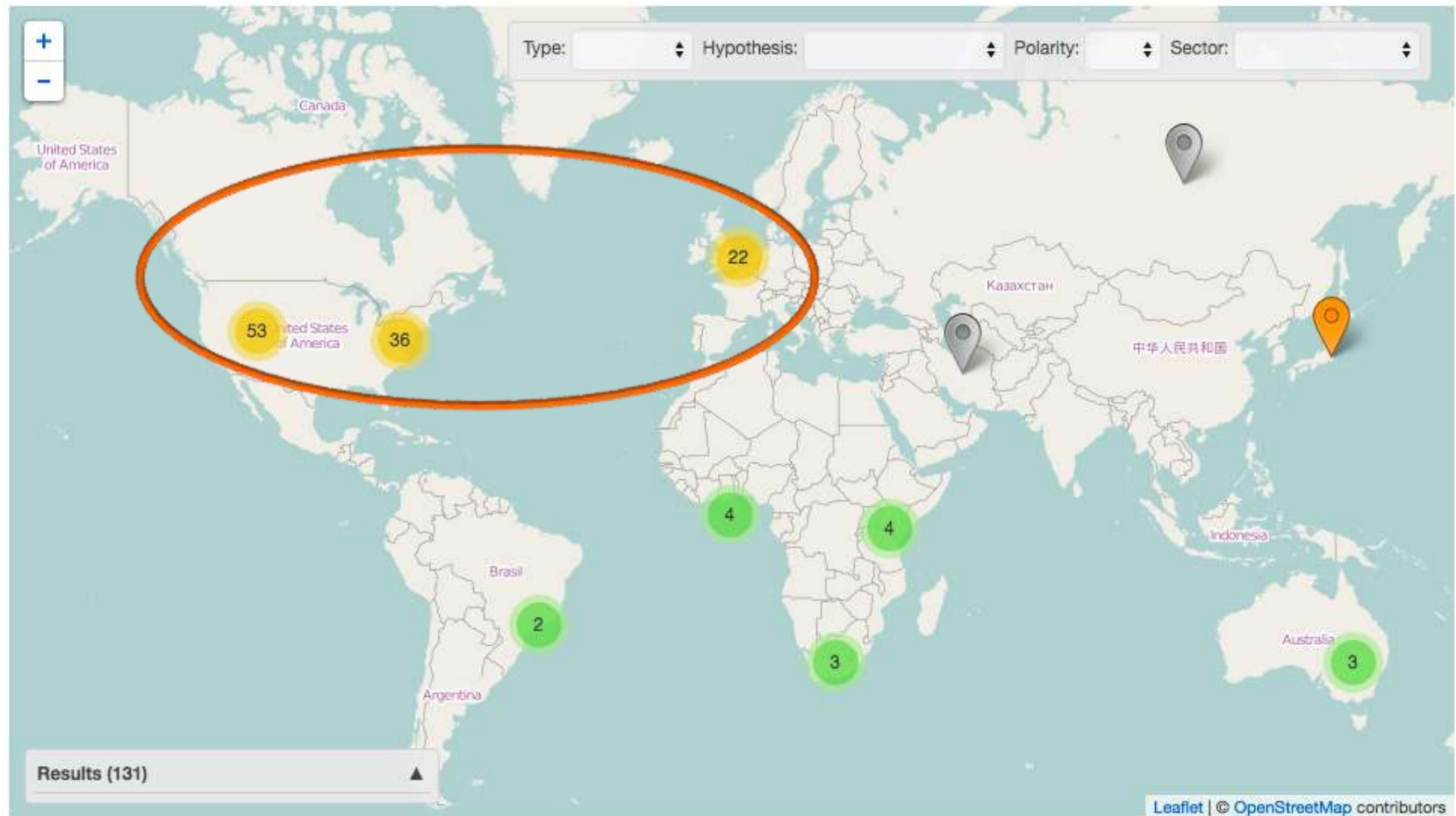
- Moses, Independent Learner, Canada

[READ MORE](#)

<http://ocw.mit.edu/about/site-statistics/>



# Most OER research taking place in Global North



<http://oermap.org/oer-evidence-map/>



# Most OER research taking place in Global North

- Located **276** articles about OER in the Global South so far in our ROER4D Bibliography
- Busy comparing this to OER Bibliography (**978** entries) provided to us by John Hilton III

File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive								
Asia								
	G	D	E	F	G	H	I	
1	Full citation	Link	Link Checked	Open Access	Language of publication	Global North or Global South	Region	Country
11	African Teacher Education Network (2014). OER in Teacher Education: Reflections from the OER Africa Teacher Education Network. Nairobi: OER Africa. A Sada Initiative. <a href="http://www.oerafrica.org/resource/oer-teacher-education-reflection-s-oer-africa-teacher-education-network">http://www.oerafrica.org/resource/oer-teacher-education-reflection-s-oer-africa-teacher-education-network</a>	<a href="http://www.oerafrica.org/resource/oer-teacher-education-reflection-s-oer-africa-teacher-education-network">http://www.oerafrica.org/resource/oer-teacher-education-reflection-s-oer-africa-teacher-education-network</a>	27 Oct 2015 TC	Yes	English	Global South	Africa	Kenya
12	Aparkar, S. C. and Deshmukh N. D. (2011). Developing Open Educational resources in school mathematics, In Charles A. Stonerger and Gayla A. Akniyva (Eds.) Proceedings of the London International Conference on Education, Informatics Society	<a href="http://www.hbcse.tifr.res.in/research-development/works/open-educational-resources-for-schools-oer4s%at_language%at">http://www.hbcse.tifr.res.in/research-development/works/open-educational-resources-for-schools-oer4s%at_language%at</a>	27 Oct 2015 TC	No	English	Global South	South Asia	India
13	Aparkar, S. C. & Deshmukh N. D. (2012). Supporting school mathematics education through open educational resources, in M. Kharatmal, A. Kanhera, K. Subramaniam (Eds.) Proceedings of the NIME National Conference on Mathematics Education, HBCSE, TIFR	<a href="http://www.hbcse.tifr.res.in/research-development/works/open-educational-resources-for-schools-oer4s%at_language%at">http://www.hbcse.tifr.res.in/research-development/works/open-educational-resources-for-schools-oer4s%at_language%at</a>	27 Oct 2015 TC	No	English	Global South	South Asia	India
14	Akweley, J. O. & Larbi, C. (2013) Expresso Submarine Cable Lands in Ghana. <a href="http://www.modernghana.com/news/4637981/1/expresso-submarine-cable-lands-in-ghana.html">http://www.modernghana.com/news/4637981/1/expresso-submarine-cable-lands-in-ghana.html</a> Retrieved: 20/02/2013	<a href="http://www.modernghana.com/news/4637981/1/expresso-submarine-cable-lands-in-ghana.html">http://www.modernghana.com/news/4637981/1/expresso-submarine-cable-lands-in-ghana.html</a>	27 Oct 2015 TC	N/A	English	Global South	Africa	Ghana
20	Aly, M. & Samaka, M. (2013). Open education resources and mobile technology to narrow the learning divide: The International Review of Research in Open and Distributed Learning (IRRODL), 14(2), 14-27. Retrieved from <a href="http://www.irrodl.org/index.php/irrodl/article/view/1530">http://www.irrodl.org/index.php/irrodl/article/view/1530</a>	<a href="http://www.irrodl.org/index.php/irrodl/article/view/1530">http://www.irrodl.org/index.php/irrodl/article/view/1530</a>	27 Oct 2015 TC	Yes	English	Global South		
21	Alperin, J. P., Fischman, G., & Wilensky, J. (2008). Open access and scholarly publishing in Latin America: Ten favours and a few reflections. <i>Linea: Em Revista</i> , 4(2). <a href="http://revista.dct.br/linea/index.php/linea/article/view/269">http://revista.dct.br/linea/index.php/linea/article/view/269</a>	<a href="http://revista.dct.br/linea/index.php/linea/article/view/269">http://revista.dct.br/linea/index.php/linea/article/view/269</a>	27 Oct 2015 TC	Yes	Portuguese	Global South	Latin America	
+ Overview OER References Open Textbook References MOOC References Edu Expenditure OER-friendly journals Activity Theory Methodologic								

<http://tinyurl.com/ROER4D-Bibliography>



# ROER4D Research: OER Adoption & Impact

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

### GENERAL OBJECTIVE:

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

August 2013 - February 2017

### 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



[roer4d.org](http://roer4d.org)

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ResearchOERforDevelopment](https://facebook.com/ResearchOERforDevelopment)  
[twitter.com/roer4d](https://twitter.com/roer4d)



**ROER4D**

Research on Open Educational Resources for Development  
/ jothi de / ROER-for-DE



Centre de recherches pour le  
développement à l'échelle nationale





# ROER4D Funding

IDRC

OSF

DFID

International Development Research  
Centre (IDRC)  
Open Society Foundations (OSF)  
UK Department for International  
Development (DFID)

**3** year project (27 Aug 2013 - 27 Aug 2016 with an extension to Feb 2017)

Grant 1 - IDRC **CAD 2 million** & OSF  
Grant 2 - DFID **CAD 500,000**

**3** Regions

- South America
- Sub-Saharan Africa
- Central, South & South-East Asia

**18** research projects in 7 clusters

**86** researchers & associates

**26** countries

**16** time zones





In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

A world map with a light gray background. The landmasses are shown in a darker gray. A large, semi-transparent green oval highlights the regions of South America, Africa, and Asia, which are collectively labeled as the 'Global South'. The text 'Global South' is written in a bold, green, sans-serif font, slanted upwards from left to right, and is positioned over the highlighted area.

Global South



# Research on Open Educational Resources for Development (ROER4D)

In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

## **ADOPTION STUDIES**

1. In what ways, and under what circumstances are OER being adopted in the Global South?



# Research on Open Educational Resources for Development (ROER4D)

In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

## ADOPTION STUDIES

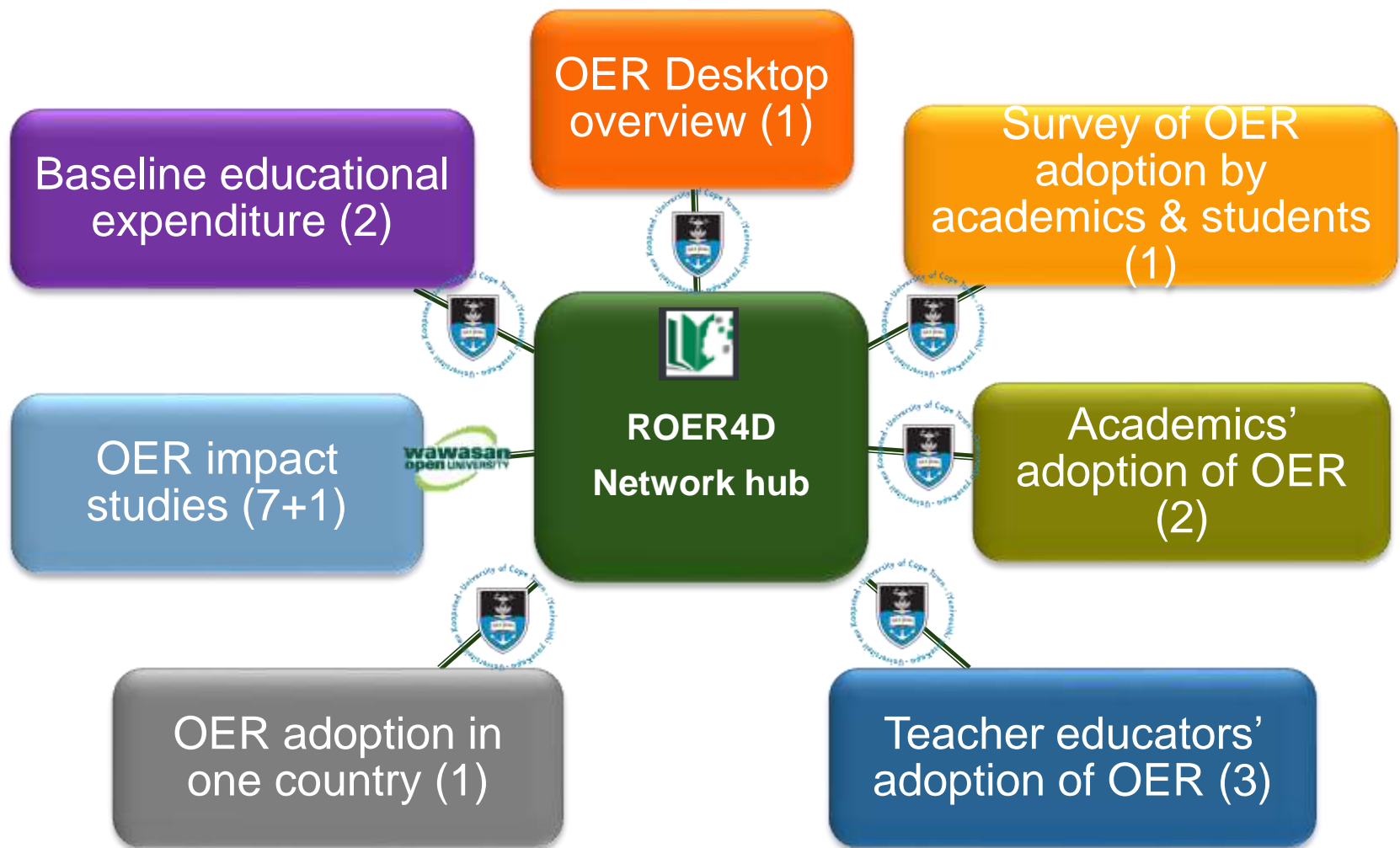
1. In what ways, and under what circumstances are OER being adopted in the Global South?

## IMPACT STUDIES

2. In what ways, and under what circumstances can OER adoption impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?



# Overview of ROER4D's 7 Project Clusters

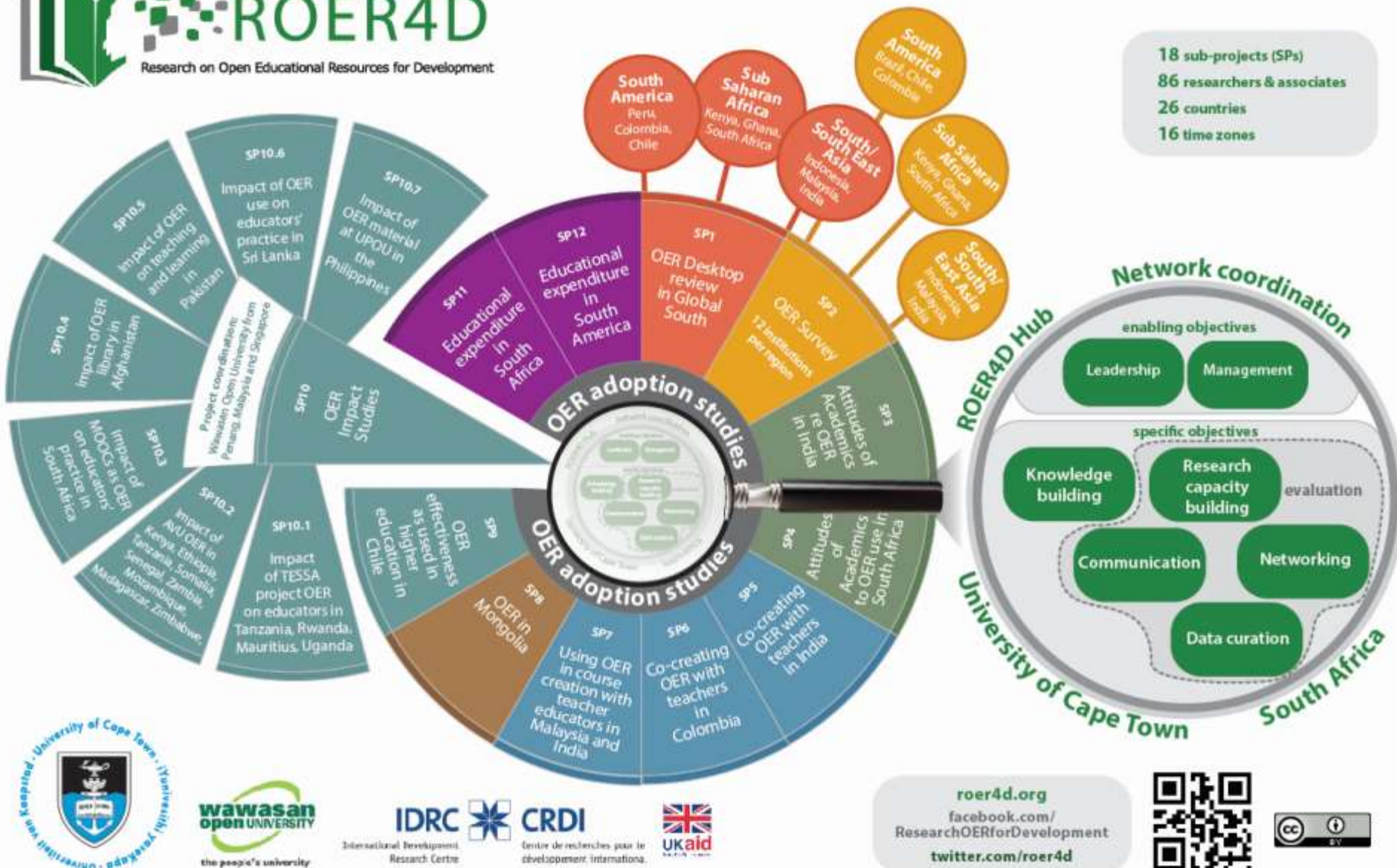




# ROER4D's Project Clusters & Coordination



18 sub-projects (SPs)  
86 researchers & associates  
26 countries  
16 time zones





# ROER4D 7 projects, 14 countries in Africa

1. Ethiopia
2. Ghana
3. Kenya
4. Madagascar
5. Mauritius
6. Mozambique
7. Rwanda
8. Senegal
9. Somalia
10. South Africa
11. Tanzania
12. Uganda
13. Zambia
14. Zimbabwe





# ROER4D Research sites and participants in Africa

SP1

- Desktop Review – Ghana, Kenya, South Africa

SP2

- Cross regional survey of **student and educator OER adoption**– 12 institutions HE in Ghana, Kenya, South Africa

SP4

- Case study or **academics' adoption** of OER – South Africa

SP10.1

- Impact study of **educators' practices** in TESSA project

SP10.3

- Impact study on MOOC development on academics' **pedagogical practices** – South Africa

SP11

- Baseline study of **government spending on educational resources** – South Africa, Kenya



# ROER4D Specific Objectives

## Original specific objectives:

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

## Adapted specific objectives:

- Build an empirical knowledge base on the use and impact of OER in **education**
- Develop the research capacity of OER researchers
- Build a network of OER scholars
- Communicate research to inform education policy and practice
- **Develop a strategic approach towards the curation and dissemination of research documents and data collected in the project**

Implicit objective: Undertake research on OER as 'openly' as possible



# ROER4D Main research question

## Original main research question

*In what ways, and under what circumstances can the adoption of OER address the increasing demand for accessible, relevant, high-quality and affordable post-secondary education in the Global South?*

## Adapted main research question

*In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?*

**INFLUENCING FACTORS:** structural, cultural, agential

**OER PRACTICES:** OER awareness, access, creation, 5 Rs (reuse, revision, remixing, redistribution, retention), non-use

**IMPACT INDICATORS:** accessible materials, affordable & high-quality materials, learner performance, teacher practice



# ROER4D Relationships being investigated

**CHALLENGES** – Access to HE, Cost of materials & Quality of materials and teaching

## INFLUENCING FACTORS

(See Archer)

- ✎ *Structural:*
  - ✧ Infrastructure
  - ✧ Policy
  - ✧ Repositories
  - ✧ ...
- ✎ *Cultural*
  - ✧ Compliance culture
  - ✧ Management styles
  - ✧ ...
- ✎ *Agential*
  - ✧ Awareness
  - ✧ Will / volition
  - ✧ ...

## OER & OER PRACTICES

(Innovation) (See Wiley, Beetham, Hodgkinson-Williams)

- OER as the object/product
  - Cost
- OER as a practice/process by EDUCATORS & STUDENTS
  - Location
  - Creation
  - Reuse (as is)
  - Revision
  - Remixing
  - Retaining
  - Redistribution

## IMPACT INDICATORS

(of aspect of educational problems/ development imperatives) (See Mulder)

- **Learner**
  - Performance
  - Satisfaction
  - ...
- **Teacher**
- **Learning materials**
  - Cost
- **Learning processes**
- **Educational system**
- **Societal context**

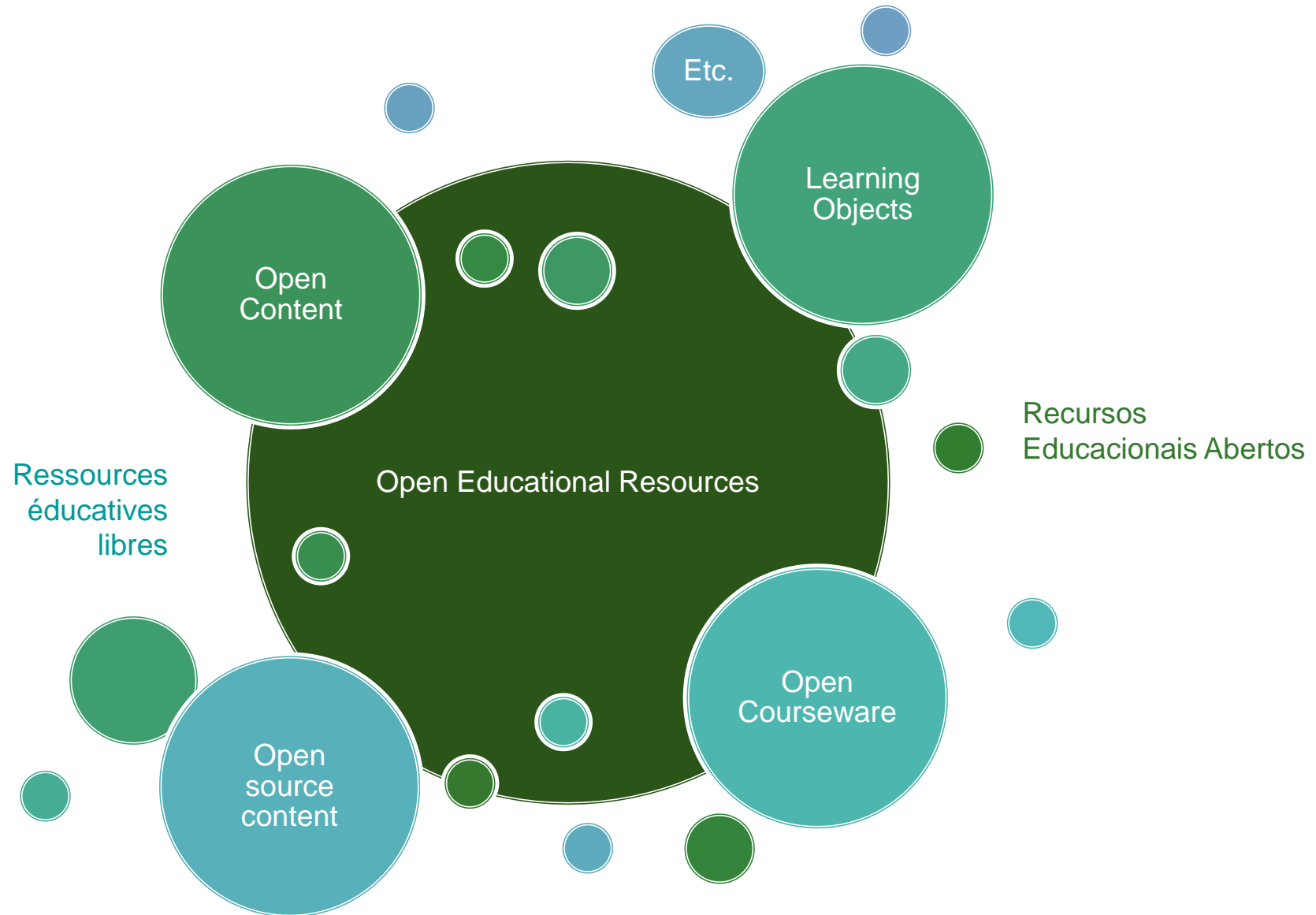


# Teasing out relationships between ...

What <b>challenges</b> are prompting ...	<b>Whom</b> ... to adopt OER (or not)	In <b>what ways</b> ...	Under <b>what circumstance</b> s ...	Is this having an <b>impact</b> upon ...
<ul style="list-style-type: none"> <li>• Inequality of access</li> <li>• Cost of materials</li> <li>• Contextual relevance of teaching and learning materials</li> <li>• Variable quality of teaching</li> </ul>	<p>Teachers/ educators/ tutors/ lecturers / academics with varying:</p> <ul style="list-style-type: none"> <li>• Age</li> <li>• Gender</li> <li>• Qualifications</li> <li>• Experience</li> <li>• Type of education</li> <li>• Personal knowledge &amp; skills</li> <li>• Personal motivation</li> </ul>	<p>Adopting OER by:</p> <ul style="list-style-type: none"> <li>• Locating</li> <li>• Creating</li> <li>• Reusing</li> <li>• Revising</li> <li>• Remixing</li> <li>• Retaining</li> <li>• Redistributing</li> </ul>	<ul style="list-style-type: none"> <li>• Relevance of content</li> <li>• Policy influence</li> <li>• Infrastructural issues</li> <li>• Institutional support</li> <li>• Facility provisioning</li> <li>• Legal issues</li> <li>• Quality assurance issues</li> <li>• Socio-cultural norms</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Learning materials themselves</b> <ul style="list-style-type: none"> <li>• Affordability</li> <li>• Quality of content - Localised</li> </ul> </li> <li>• <b>Learner performance</b> <ul style="list-style-type: none"> <li>• Engagement</li> <li>• Marks</li> <li>• Satisfaction</li> </ul> </li> <li>• <b>Teacher practice</b> <ul style="list-style-type: none"> <li>• Flexibility</li> </ul> </li> </ul>



# Understanding OER terms





# Conceptual clarification strategies: Open Google Doc


ROER4D Research Concepts ☆

File Edit View Insert Format Tools Table Add-ons Help All changes saved in Drive

100% Normal text Arial 11 B I U A

1 2 3 4 5 6 7

1 of 9



**ROER4D Research Concepts - DRAFT under construction**

*Created in March 2014 by Cheryl Hodgkinson-Williams*  
*Updated by Cheryl Hodgkinson-Williams and/or Henry Trotter on 29 March 2015*

To make sure we all have a shared understanding of the concepts that we use in the ROER4D study, herewith are the initial descriptions that have been compiled. Please feel free to comment and Henry and I will synthesize the comments!

**Table of Contents**

- [Open Educational Resources](#)
- [Educational materials](#)
- [Adoption](#)
- [Access](#)
- [Create/Creation](#)
- [Awareness](#)
- [Share/Sharing](#)
- [Re-distribution](#)



# Identifying pedagogical practices in OER adoption

- Awareness of OER as a concept as well as **finding** OER
- Deliberately **creating** OER to share with others
- Merely **reusing** OER as is (i.e. copying)
- **Revising** OER (e.g. customising by translating, adding examples, resequencing materials)
- **Remixing** OER (i.e. combining materials from more than one source)
- **Retaining** OER (i.e. keeping legal copies of materials)
- **Redistributing** OER (i.e. sharing with others openly)



# Uncovering slower OER adoption than expected

- **Relevance** of OER for various contexts
- **Policy influence** - national, institutional and departmental
- **Infrastructural issues** - hardware, software, connectivity **Institutional support** - incentives, recognition, rewards, technical support
- **Facility provisioning** - uninterrupted power supply
- Familiarity with **intellectual property mechanisms** including Creative Commons
- **Quality assurance** issues – accuracy, currency
- **Socio-cultural norms** - creation of own materials, unwillingness to use others' materials



# Establishing who is adopting OER or not

- **Age**
- **Gender**
- **Qualifications**
- **Experience**
- **Type of educational environment** - campus-based university, distance university
- **Personal knowledge and skills**
- **Personal motivation** - time, priorities
- **Etc.**





# Open Research – ROER4D intentions to share










# Keep track of our website





Research on Open Educational Resources for Development  
/'rɔ:fə,di:/ - ROAR-for-DEE




FOLLOW:    

ABOUT ROER4D

**SUB PROJECTS**

- OER Desktop review
- Survey on OER use
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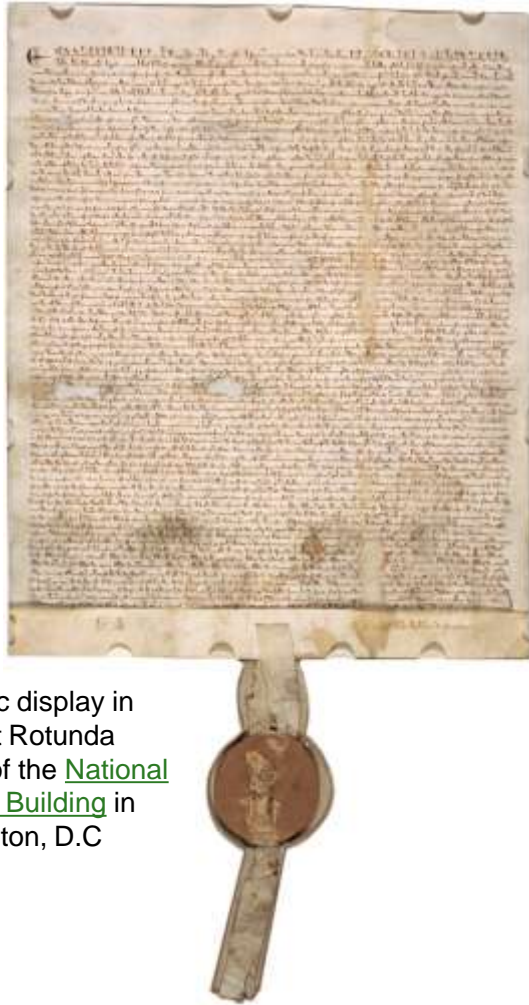
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**M**ake open ...  
... if it adds value  
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# Thank you!

Questions?  
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# References

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