Input Evaluation Report of the Open Educational Resources universitas (OERu)

December 2015

2015

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Introduction

This evaluation constitutes the Input phase of the Context, Input, Process and Product Evaluation (CIPP) model used to inform the implementation of the OERu. The purpose of the Input Evaluation was to evaluate the design options for achieving OERu goals and to inform the design decision making through reliable and systematic evidence. An online survey conducted in August 2015 received a total of 52 valid completed responses from a representative demographic. The responses came from 32 organizations in the OERu network across the globe. 34 responses (65%) were from OERu teaching partners, and 10 (19%) from non-teaching partners. 19 (37%) of organisational responses were submitted by designated respondents. Moreover, 65% of the respondents are members of active OERu working groups; 55% are at senior and middle management levels in their institutions (Figure1); and 75% rated their knowledge of the OERu concept as above average/excellent (Figure 2). All of these factors tend to assure the quality and value of the survey data.

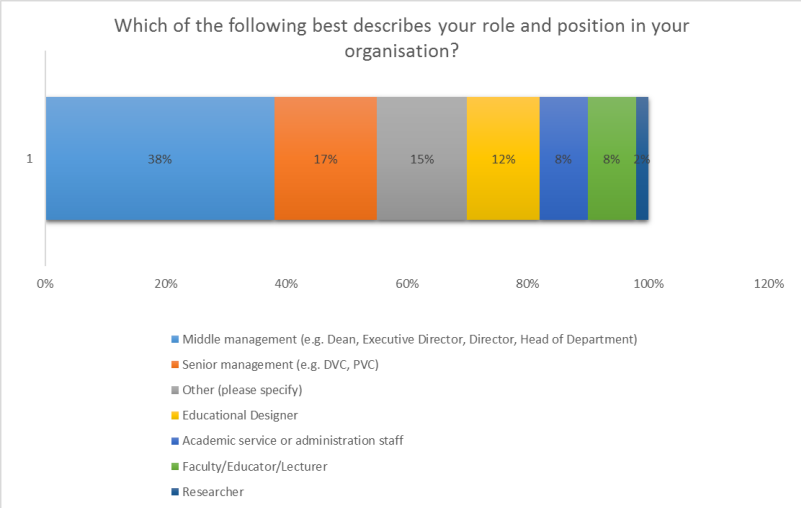


Figure 1

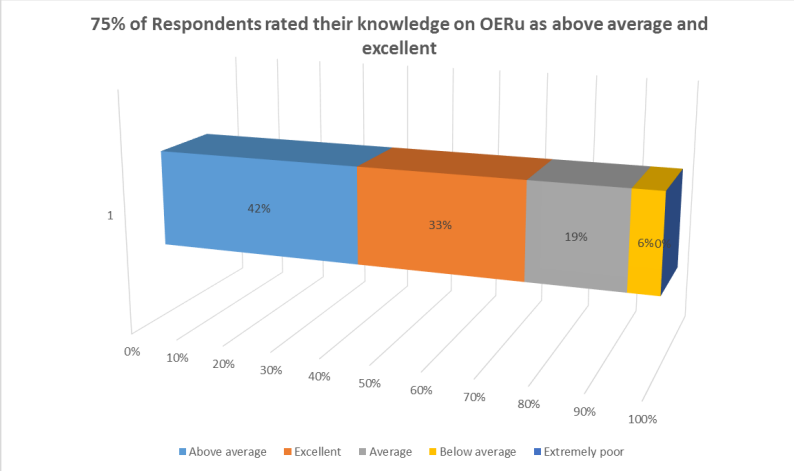


Figure 2

This report includes six sections, each of which focuses on one important aspect of design decisions related to the implementation of the OERu. In each section, the results of relevant quantitative survey questions are represented and the qualitative responses to open questions are summarised; in particular, the top-ranked items and evident consensus or divergence among respondents are

delineated. The report also includes a brief discussion of the issues and implications for design decision making and associated recommendations for implementation of the OERu.

OERU programme and curriculum

85% of respondents agree or strongly agree that the OERu should add more programmes of study (qualifications) in addition to the Bachelor of General Studies (BGS) (Figure 3). At the same time, with regard to the speed of expansion, 57% prefer that the OERu should complete the development of courses for BGS first (Figure 4). Some respondents also suggested the OERu should add programmes that are ñof greater demand and of higher value to learnersò and ñin a vocational area with high employabilityò.

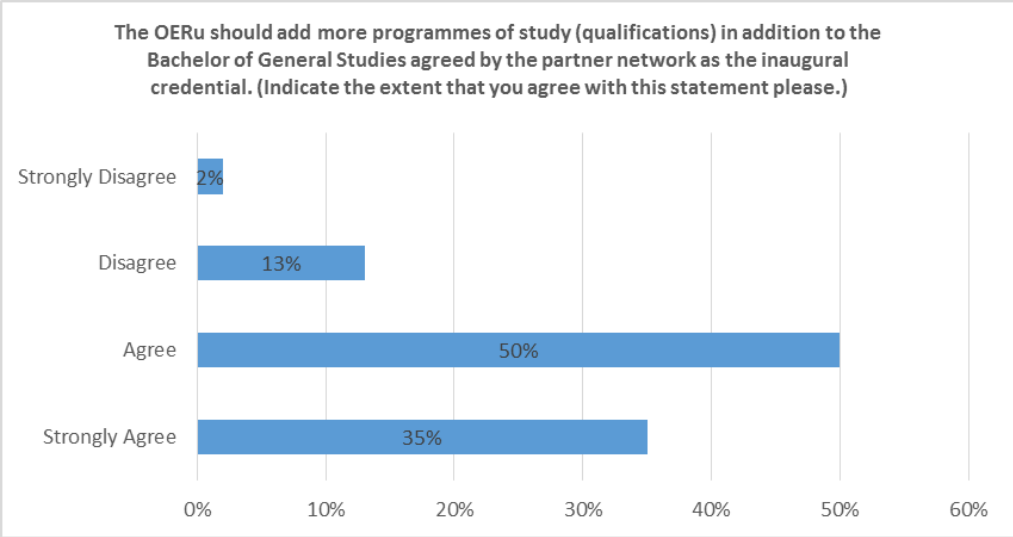


Figure 3

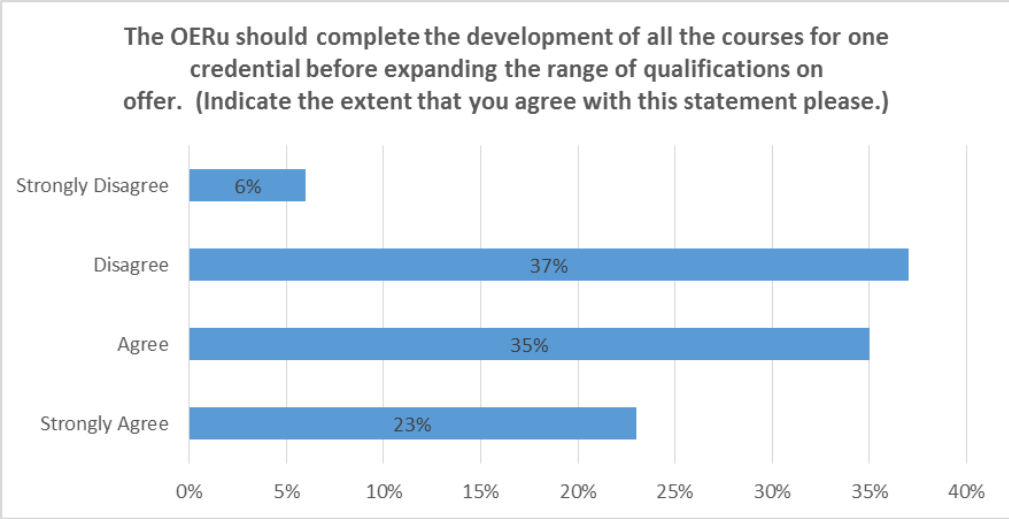


Figure 4

Among OERu courses at all levels, undergraduate courses are most valued while the biggest variance exists in attitudes towards the development of postgraduate courses (Figure 5). There is a strong consensus (98%) that the OERu courses should be designed to provide learners with more flexibility through different streams and pathways. Likewise all respondents agree with providing pre-degree exit points in the OERu Bachelor of General Studies.

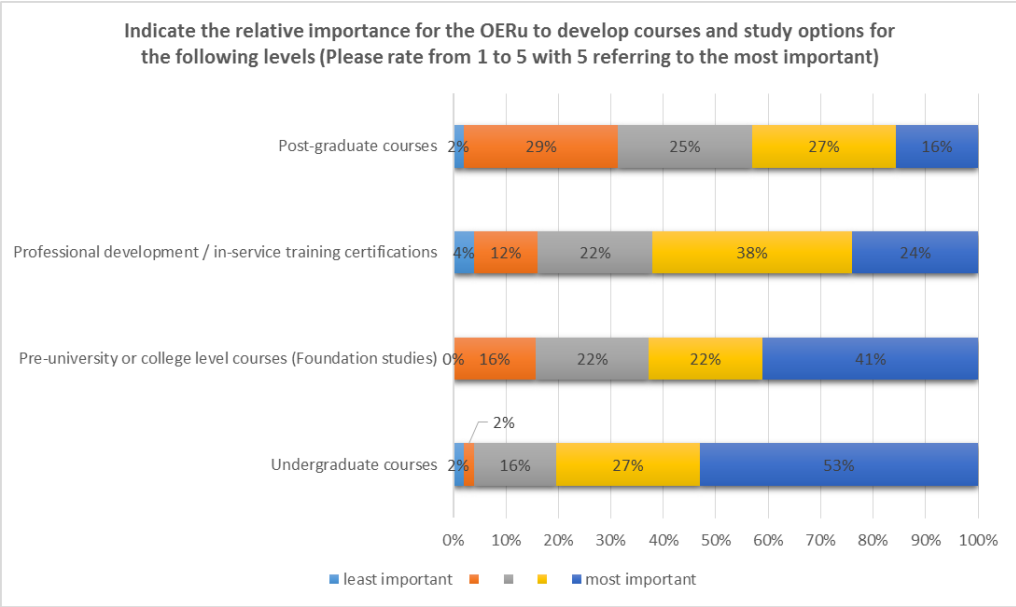


Figure 5

Over half (54%) of respondents agree that there should be no entry requirements, though a similar proportion (56%) regard language proficiency as a minimum requirement for international (second language) students (Figure 6). Respondents suggest that the OERu should consider alternative options such as multiple language courses and learnersôself-assessment in light of the goal to remove barriers rather than add them. The open mindedness reflected here implies that the barriers to institutional entry requirements might not be as challenging as thought at the outset of the OERu initiative.

91.6% of the 36 respondents from the teaching institutions of OERu are able to waive the entry requirements for 1st year of study in some cases or on some conditions. This applies especially to mature learners and for social justice purposes. However, 32.9% have statutory restrictions to waiving entry requirements when a government grant is claimed for these students or in similar situations; and 13.3% have statutory restrictions associated with specific programmes or institutional policies. However, the majority (82%) of respondents do not believe that such restrictions should also apply to other students, i.e. the students who do not receive federal support, or in cases where the organisation does not claim a government grant for the learner concerned.

Quite a few respondents mentioned that the policies on entry requirements are evolving in their institutions, with many adopting increasingly flexible assessment methods for admission; for example, recognition of prior/ equivalent learning, pre-assessment tests, interviews, etc. On the other hand, some institutions have concerns about the need to apply admission policies equitably; as one respondent pointed out:

> ***From an institutional perspective, we [need to] treat potential students fairly and consistently, so there are standards and guidance to support non-standard entry.***

Undeniably the endeavour of an open initiatives such as the OERu is likely to improve the flexibility of entry requirements. However, the design of open models also needs to seriously consider developing acceptable ñstandardsò for open learning vis-a-vis the formal institutional contexts of higher education.

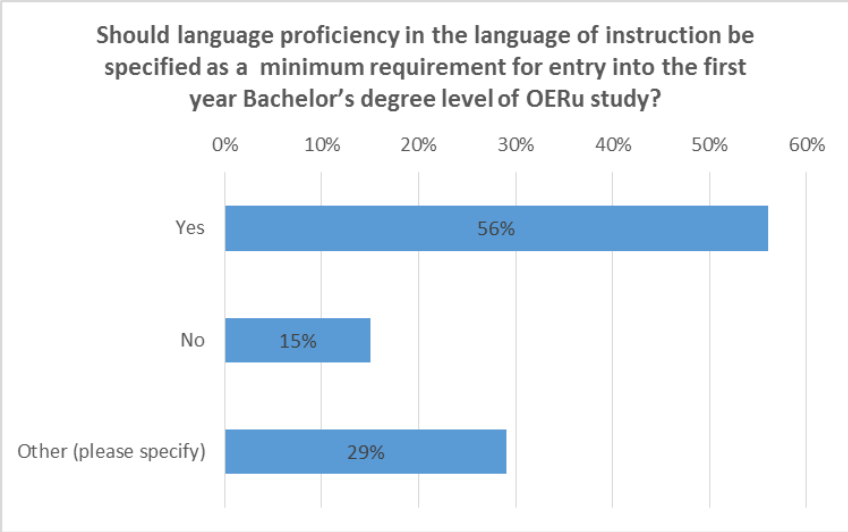


Figure 6

OERu course nomination

The survey shows both consensus and divergence on the important factors that impact course nomination. Compared with the consensus on the above important factors, the lowest ranked items came with the biggest statistical variation, with a wide variation in respondentsô opinions towards revenue generating potential and the availability of additional funding (Figure 7). This perhaps results from the different clusters involved in the OERu, with some expecting increased revenue, while others value social good. The partner institutions that have already nominated courses suggest similar factors, but they believe the factors relating to the time, effort, and cost required to convert or re-design courses for the OERu are more important in practice. They also paid more attention to the actual qualification and the capacity to provide formal academic credit, i.e. the potential of credentialing when nominating courses.

The challenges listed in nominating courses are in two major areas: (1) the lack of understanding, awareness, and commitment to open practice; and (2) the associated lack of resources as well as competing priorities and demands. Not only academic staff, but also senior managers are not familiar with open practice and even hold conservative and resistant attitudes with a fear of losing knowledge ownership or student revenue, leading to difficulties in obtaining support from faculty members and senior administration. The scarcest resources are time/workload and openly licensed content. As most current courses are designed primarily with commercial textbooks, and other subscription-based, closed content, it is challenging in practice to find suitable OERs to replace closed content and subsequently re-licence openly.

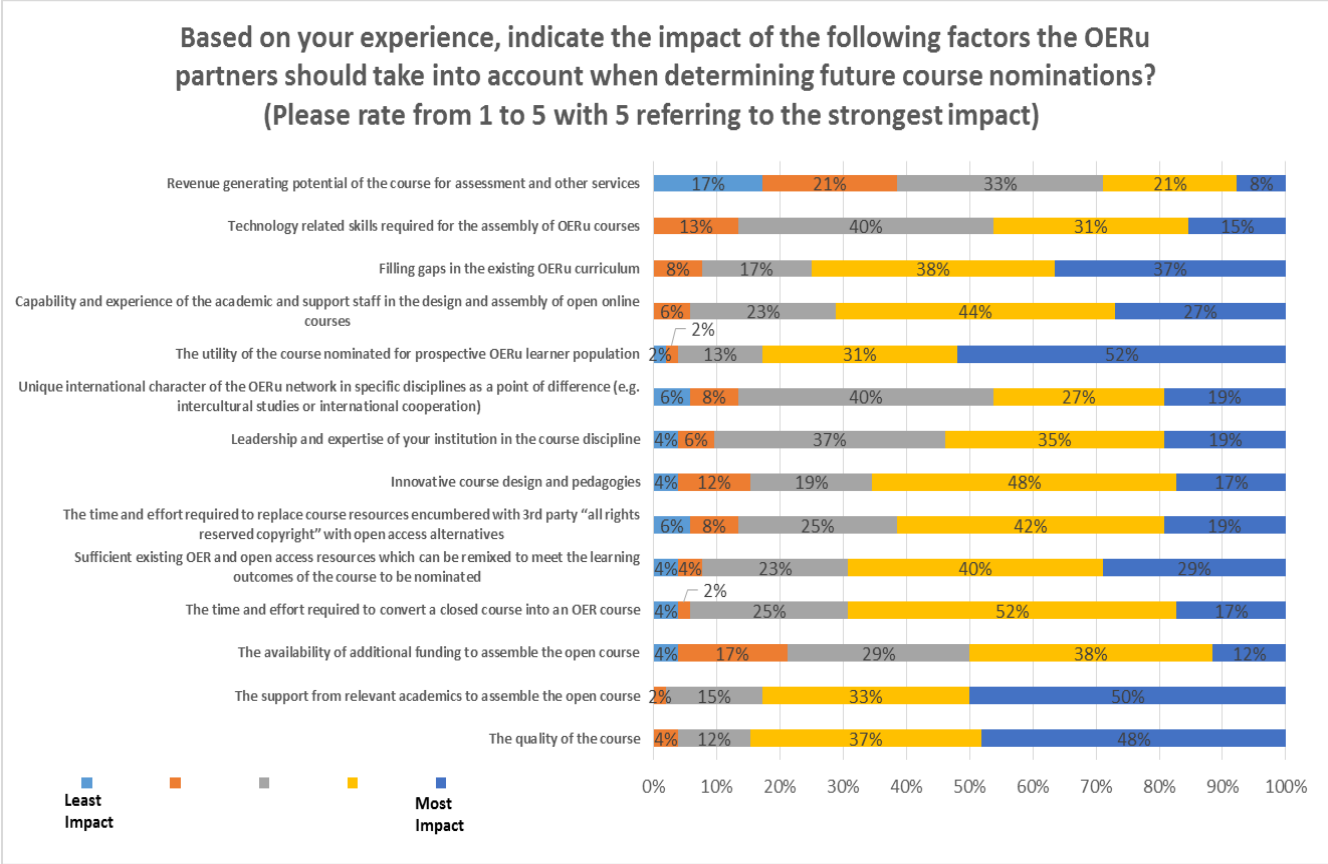

Based on your experience, indicate the impact of the following factors the OERu partners should take into account when determining future course nominations? (Please rate from 1 to 5 with 5 referring to the strongest impact)
Revenue generating potential of the course for assessment and other services
17% 21% 33% 21% 8%
Technology related skills required for the assembly of OERu courses
13% 40% 31% 15%
Filling gaps in the existing OERu curriculum
8% 17% 38% 37%
Capability and experience of the academic and support staff in the design and assembly of open online courses
6% 23% 44% 27%
The utility of the course nominated for prospective OERu learner population
2% 13% 31% 52%
Unique international character of the OERu network in specific disciplines as a point of difference (e.g. intercultural studies or international cooperation)
6% 8% 40% 27% 19%
Leadership and expertise of your institution in the course discipline
4% 6% 37% 35% 19%
Innovative course design and pedagogies
4% 12% 19% 48% 17%
The time and effort required to replace course resources encumbered with 3rd party "all rights reserved copyright" with open access alternatives
6% 8% 25% 42% 19%
Sufficient existing OER and open access resources which can be remixed to meet the learning outcomes of the course to be nominated
4% 4% 23% 40% 29%
The time and effort required to convert a closed course into an OER course
4% 2% 25% 52% 17%
The availability of additional funding to assemble the open course
4% 17% 29% 38% 12%
The support from relevant academics to assemble the open course
2% 15% 33% 50%
The quality of the course
4% 12% 37% 48%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Least Impact
Most Impact

Figure 7

The majority of partner institutions plan to re-use/re-license existing OERs for the OERu course design and development while only 6% will create new openly licensed content; 12.4% (from respondents who selected the option of ñOthersò) prefer a combination of all the models, especially ña mixture of existing and new openly licensed contentò (Figure 8). It is even recommended that the OERu network should incentivise the re-use and modification of existing open materials in its courses.

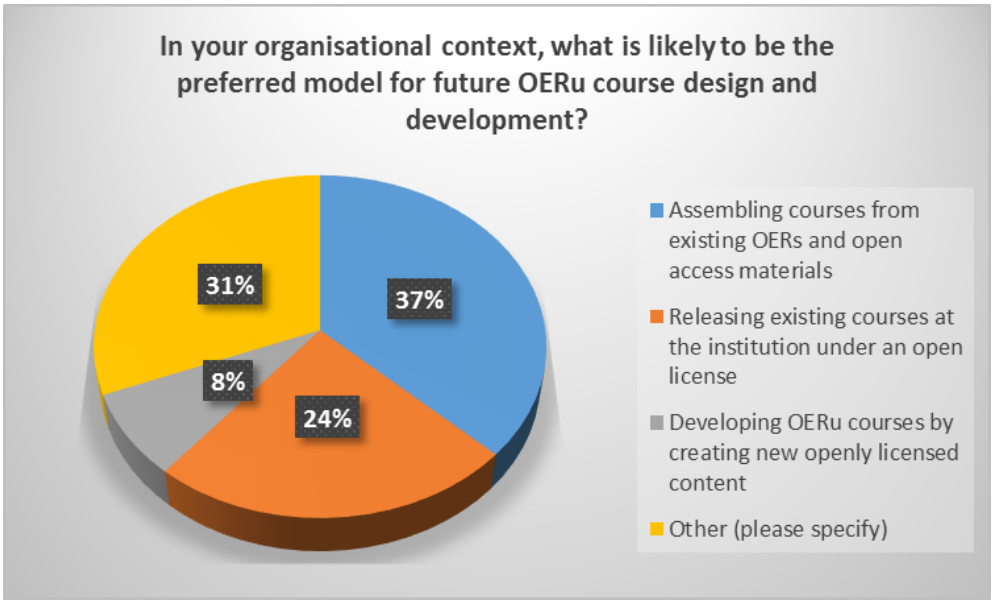


Figure 8

Reflecting the current direction of learning support design at the OERu, ñIndependent study materials and online help resourcesò and ñdedicated community social media site(s) for learner peer supportò were rated highest among all options. It is worth mentioning that none of the rest of the options were rated low (Figure 9). Respondents made a range of recommendations on a variety of possible models for learner support. There is an interesting divergence between human interaction and machine-based automatic methods. On the one hand, learner support based on local study groups, peer support teams, home institution libraries, and online learning facilitators is recommended; on the other hand, learning analytics and automated formative and summative examinations are also highly valued. Design decisions therefore need to consider the balance between the diversity, effectiveness, and sustainability of learning support methods.

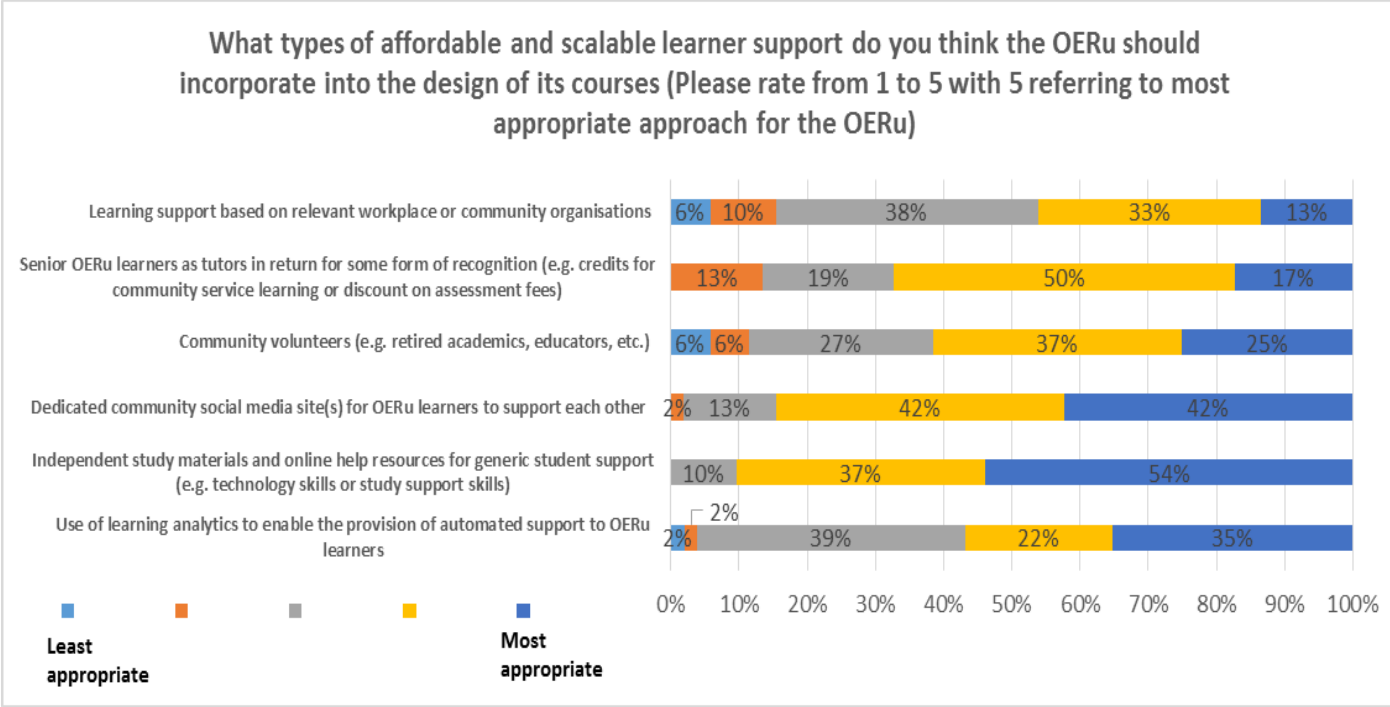


Figure 9

The majority (63%) of the respondents agrees with the standard 0.2 FTE contribution requirement for Gold level partners (Figure 10). 42% of the respondents believe their institutions plan to assemble more than two courses, and 11% plan to contribute one or more full programmes/credentials for the OERu (Figure 11). Interestingly from the 19 designated institutional respondents, the figures are even higher: 65% and 18% respectively. Further, 44% recommend that the completion of the first course nominated should be within one year of joining the network, while 37% nominated within two years (Figure 12). These findings suggest that the OERu community supports the current framework of membership commitments in terms of a minimum of two course nominations, while many institutions hope to make additional contributions.

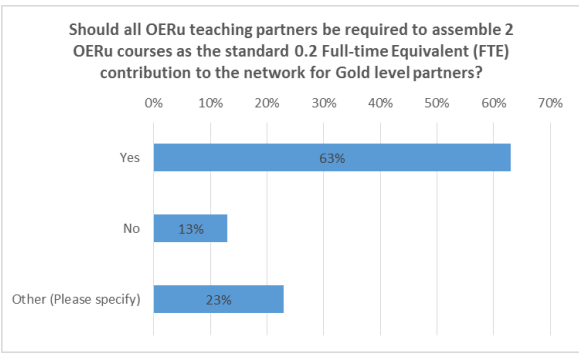


Figure 10

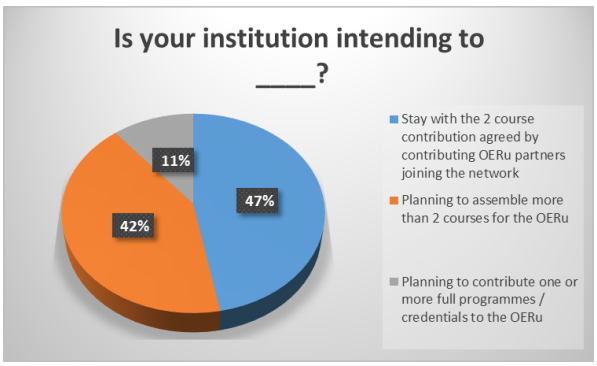


Figure 11

Meanwhile, 58% hope the OERu will recognise alternate contributions other than the assembly of two courses (Figure 13). Respondents have listed a variety of alternate contributions, including assistance

with the design and development of the OERu, financial support, staff workload, technological and/or administrative support, PD and mentoring services, peer review and quality control of courses, workgroup participation, fundraising and grant application, assessment and credentialing for the OERu courses, marketing, and advocacy. It is also suggested that, collaboration should be encouraged in meeting the overall commitments rather than measuring contributions based on single institutions only. As such, a more pragmatic and flexible focus of membership commitments and contribution appears to be warranted.

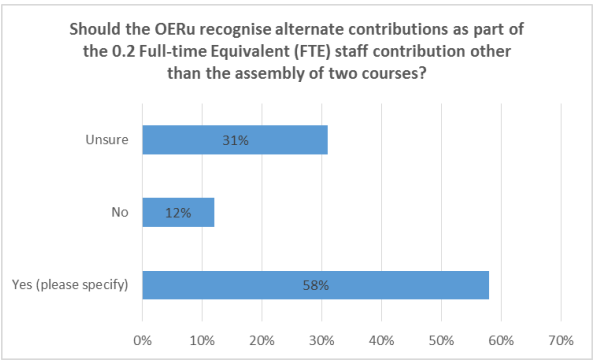


Figure 12

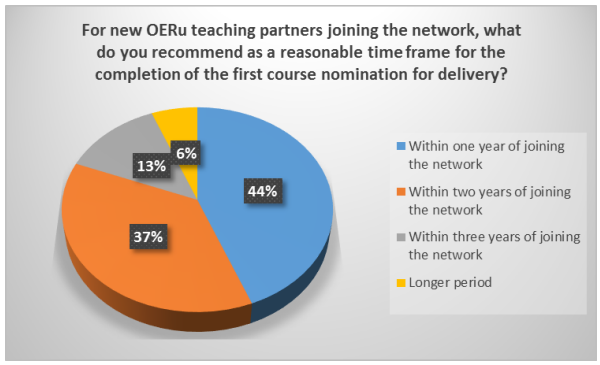


Figure 13

Credentialing, assessments, and certification

The tension between open dynamics and institutional constraints in assessing and credentialing OERu learners is crucial. In addition to regulatory frameworks, the challenges also come from peopleôs resistance and conservative attitudes due to lack of understanding, the dominance of traditional pedagogies and paradigms, and worries that additional workload will be generated. In many institutions, policy changes are required in almost all key areas of assessment and credentialing in order to award credits to OERu learners. For example, the Recognition of Prior Learning and residency requirements need to be reconsidered in enrolment and admission; assessment methods such as remotely proctored online examinations and automated assessment mechanisms require institutional approval; and new policy on cross-institutional credit transfer, particularly international transfer based on open online learning is needed. It is believed that such policy changes will engender approval from senior managerial levels, will build the authority of credentialing, and will improve technical viability, all of which are essential for the successful implementation of the OERu by individual partner institutions.

Currently, the OERu partner institutions are at various stages of policy development towards an ñopenness agendaò. At the moment, the structure and expected learning outcomes of the OERu courses and programmes are not clear. Many partners regard this as a bottleneck, as it is difficult to develop practical policy changes prior to tangible courses. It is also recommended that the OERu community might consider scaling up or adapting to policy initiatives like the European Credit Transfer System (ECTS), or drawing existing institutional policies ñtogether into one overarching perspectiveò.

The partners retain decision-making autonomy regarding assessment and credentialing to ñensure flexibility of the OERu model to operate within the confines of existing organizational policiesò. However, the OERu still needs to take some proactive collective steps to make policy changes in local institutions smoother. In practice, the OERu has developed guidelines for cross-institutional credit transfer, which could well be a constructive first step to overcome the obstacles identified. It is worth noting, however, that to date only 25% of the respondents have discussed these guidelines within their organizations (Figure 14).

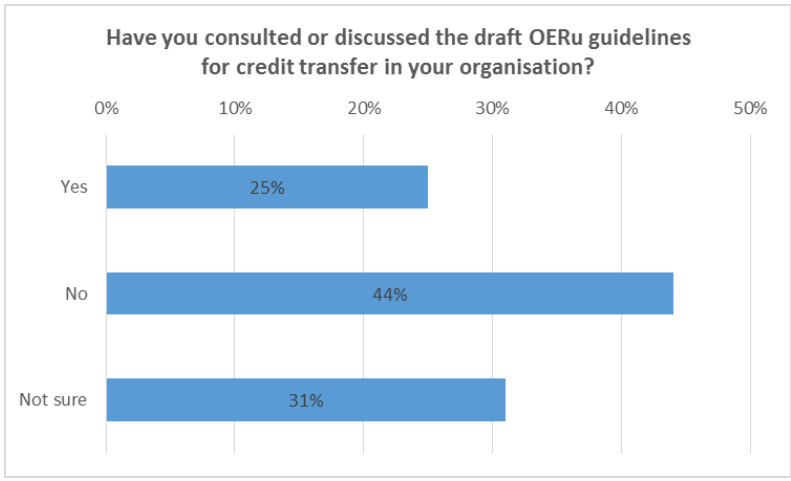


Figure 14

In addition to the formal credits awarded by educational institutions, a number of alternative certification systems are also taken into account. Open badges are the most favoured (56%) alternative certification to formal academic credits, followed by micro-credentials (42%) and certified prior learning experience (38%) (Figure 15). These preferences will likely influence the design of more flexible OERu certification models. Open badges could well make the OERu certification system more compatible and interchangeable with other initiatives in the emerging open learning ecosystem.

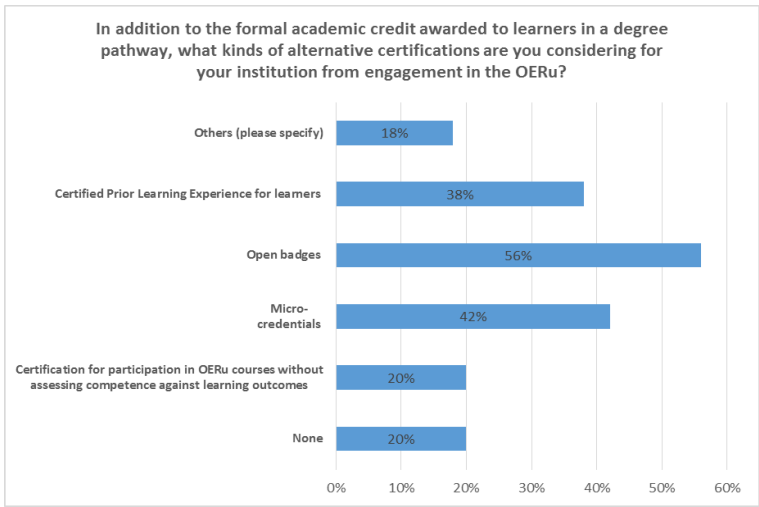


Figure 15

There was a huge variation in responses about the price that institutions would charge for providing assessment only services for OERu learners. On the other hand, 69% of respondents would support a process whereby OERu develops ǿrecommended retail priceô guidelines to assist in determining particular price levels at the institutional level (Figure 16).

Figure 16

Motivation, challenges, and sustainability

We repeated one question of the previous context evaluation survey regarding the motivations for participating in the OERu network. The three highest rated items are exactly the same as last time, and with least statistical variation (i.e. disagreements): namely, participation in an international network of accredited institutions, the opportunity to make a philanthropic contribution, and participation in a recognised OER initiative. In contrast, the lowest ranked motivations all come with big statistical variations. For example, respondents have the most diverse opinions on ñPotential to reduce cost and save time associated with the development of learning materialsò (Figure 17).

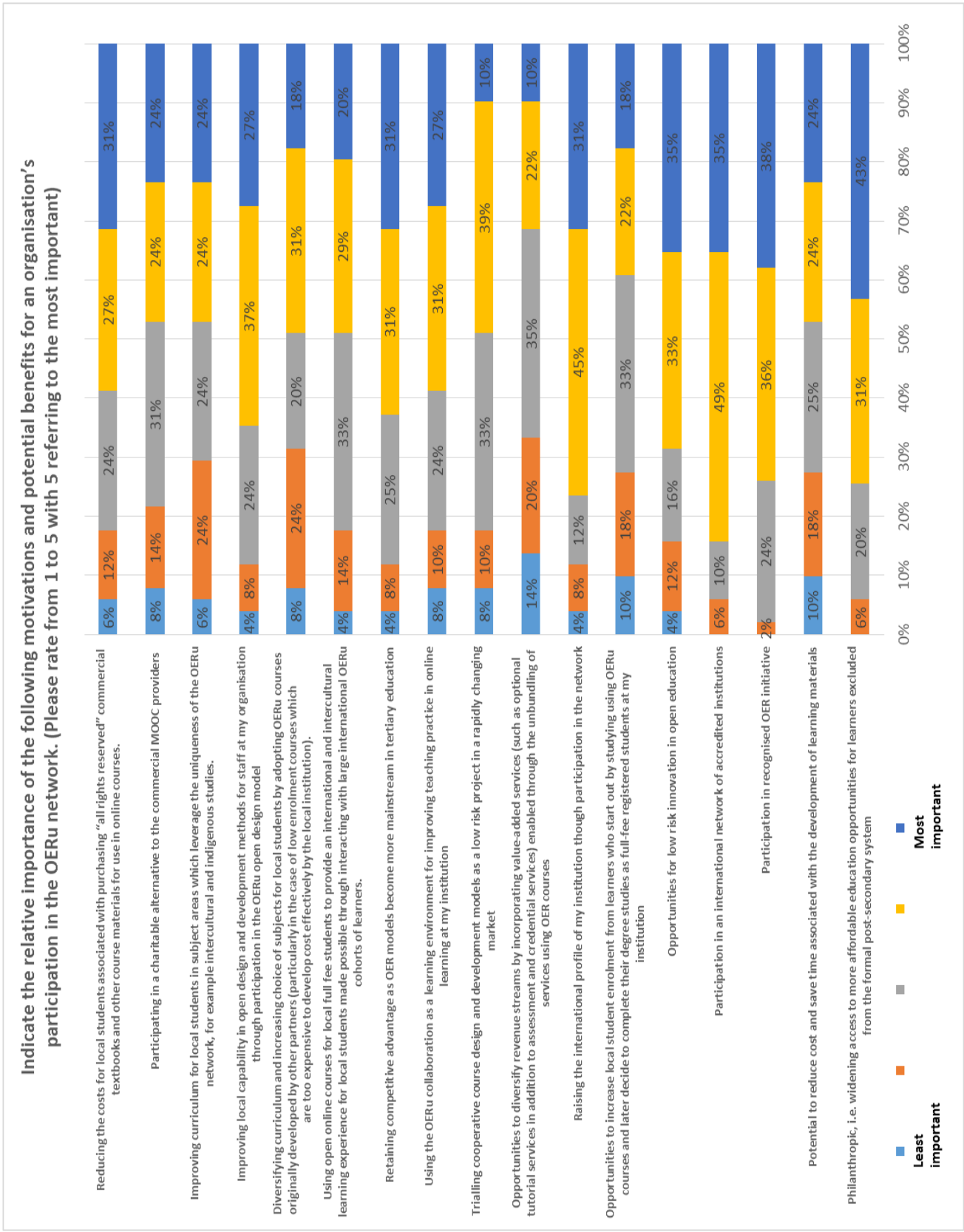

Indicate the relative importance of the following motivations and potential benefits for an organisation's participation in the OERu network. (Please rate from 1 to 5 with 5 referring to the most important)
Reducing the costs for local students associated with purchasing "all rights reserved" commercial textbooks and other course materials for use in online courses.
6% 12% 24% 27% 31%
Participating in a charitable alternative to the commercial MOOC providers
8% 14% 31% 24% 24%
Improving curriculum for local students in subject areas which leverage the uniqueness of the OERu network, for example intercultural and indigenous studies.
6% 24% 24% 24% 24%
Improving local capability in open design and development methods for staff at my organisation through participation in the OERu open design model
4% 8% 24% 37% 27%
Diversifying curriculum and increasing choice of subjects for local students by adopting OERu courses originally developed by other partners (particularly in the case of low enrolment courses which are too expensive to develop cost effectively by the local institution).
8% 24% 20% 31% 18%
Using open online courses for local full fee students to provide an international and intercultural learning experience for local students made possible through interacting with large international OERu cohorts of learners.
4% 14% 33% 29% 20%
Retaining competitive advantage as OER models become more mainstream in tertiary education
4% 8% 25% 31% 31%
Using the OERu collaboration as a learning environment for improving teaching practice in online learning at my institution
8% 10% 24% 31% 27%
Trialling cooperative course design and development models as a low risk project in a rapidly changing market
8% 10% 33% 39% 10%
Opportunities to diversify revenue streams by incorporating value-added services (such as optional tutorial services in addition to assessment and credential services) enabled through the unbundling of services using OER courses
14% 20% 35% 22% 10%
Raising the international profile of my institution though participation in the network
4% 8% 12% 45% 31%
Opportunities to increase local student enrolment from learners who start out by studying using OERu courses and later decide to complete their degree studies as full-fee registered students at my institution
10% 18% 33% 22% 18%
Opportunities for low risk innovation in open education
4% 12% 16% 33% 35%
Participation in an international network of accredited institutions
6% 10% 49% 35%
Participation in recognised OER initiative
2% 24% 36% 38%
Potential to reduce cost and save time associated with the development of learning materials
10% 18% 25% 24% 24%
Philanthropic, i.e. widening access to more affordable education opportunities for learners excluded from the formal post-secondary system
6% 20% 31% 43%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Least important
Most important

Figure 17

Respondents were also asked to rate the most important factors to sustain their institutionsô OERu activities. The commitment to community service is at the top, followed by converting OERu learners to future full-fee students; but significant divergence exists in the questions relating to revenue generation (Figure 18). As such, it seems reasonable to suggest that the OERu should continue to position itself as an internationally recognised OER community with open education as an underpinning value, while at the same time incorporating partner institutionsôdiverse motivations for both revenue generation and social good.

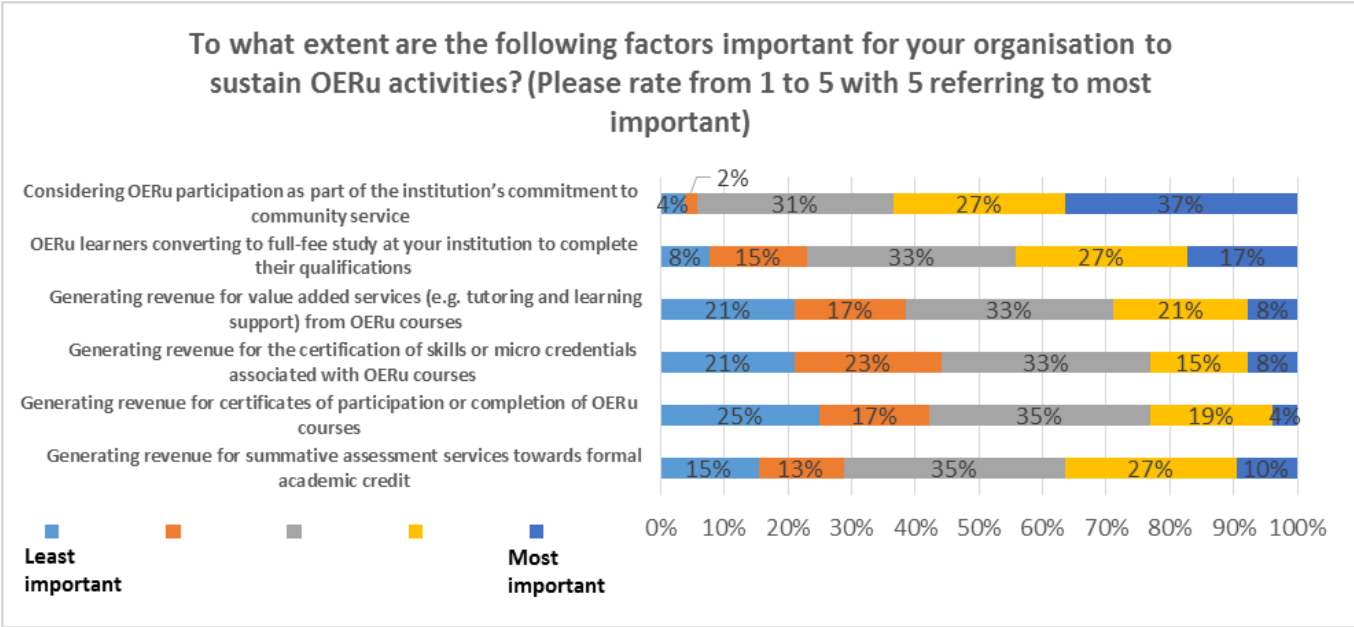


Figure 18

The unexpected benefits of participation in the OERu are mostly related to personal professional development and networking in the field of open education. Just as the respondents point out:

I learned so much about open education (open access, open policy...) and I built more on my skills in open course design than expectedé I have grown my Professional Learning Network immensely... I feel well connected, supported and mentored online by my online colleagues.

Such benefits of professional development also apply to the staff in local institutions who are not directly involved in the OERu network. There are other institutional benefits as well in terms of OER engagement, open advocacy, and open education leadership. As a respondent summarises:

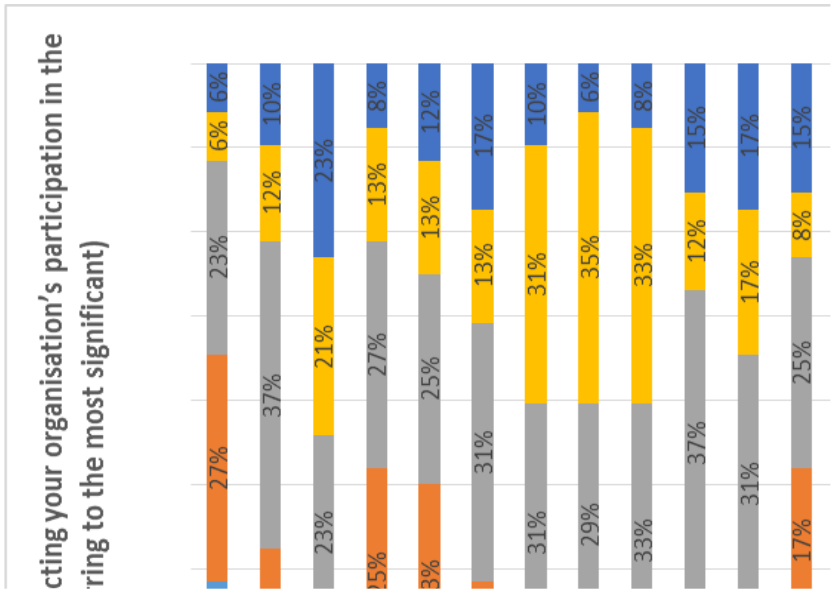
[The unexpected benefits include] advancing the global institutional footprint and philosophy of education as a global common good, positioning [our institution] as a leader in curriculum transformation, enabling personal expertise to be shared and contributing to refinement of practices.

As such, the value of the OERu does not only incorporate pragmatic contributions and tangible ñproductsò. Rather, the OERu has been playing a significant role in mentoring a wide range of people and building supportive networks, which contributes to the growth and sustainability of the open education ecosystem at large. These valuable functions appear to deserve more attention in designing and evaluating the OERu.

The biggest barrier for institutions to participate in the OERu is ñcompeting demands on time and resources to maintain OERu project momentumò. Harnessing open dynamics to improve the efficiency of OERu models/systems could serve to ameliorate this concern. Respondentsô opinions on other challenges are mixed (illustrated by wide statistical variation in survey results), in relation to such concerns as: ñLack of exemplars of OERu coursesé ò, ñLack of continuity in senior management roles at the institutional levelò, ñLack of accountability for non-delivery of agreed contributionsò, and ñLack of guidance and support for new partners who join the networkò (Figure 19). It is clear that the range of varied responses to these pressing issues should be a key focus for further discussion by the OERu community.

The responses to open survey questions identify more barriers in terms of peopleôs understanding, awareness, and attitudes. It is not surprising given that the overall open agenda has not been prioritised, approved, or supported in most educational institutions and there is considerable resistance from established paradigms and cultures. Probably the best way to gain institutional support and approval is not only through advocacy, but also by building convincing exemplars and tangible products - an issue the OERu needs to deal with urgently.

Figure 19



Technology support

The most popular Learning Management Systems (LMSs) in the OERu network are Moodle (62%), Blackboard (33%), and WordPress (31%), followed by a ñlong tailò of other LMSs (Figure 20). The diversity of LMSs across the network highlights the importance of the current OERu approach of promoting the authoring of course materials in a LMS agnostic fashion and thereby enabling solutions for the integration of outputs across multiple delivery platforms.

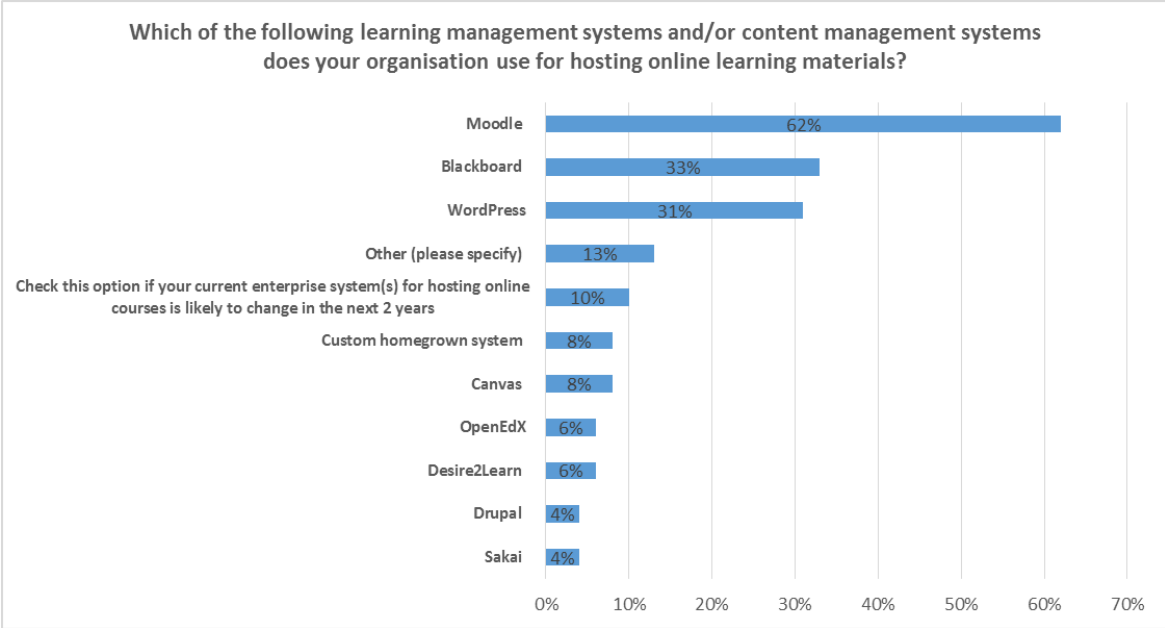


Figure 20

The respondentsô selection of the most important OERu technology considerations reflects strong interest in reusing OERu courses in local LMS operations; open source development and associated collaboration (Figure 21). These considerations are consistent with previous findings that , for instance, most partners plan to develop open courses through reusing OERs, and that partners value local benefits in sustaining their OERu participation.

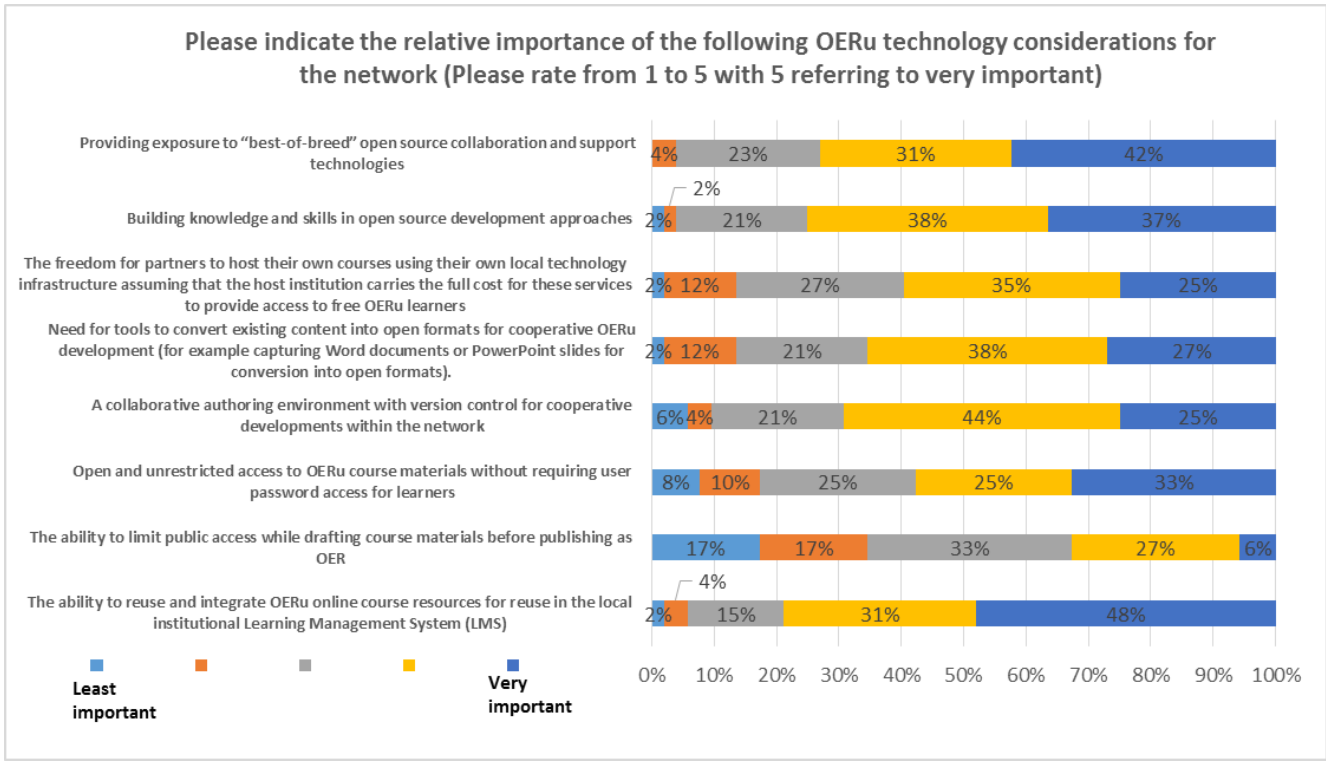


Figure 21

Though many respondents believe attitudes outweigh current capacity in OERu engagement, there are still quite a few important fields of capacity building needed; for example, open course design, institutional repositories of OERs, copyright and open content licensing, embedding OERs within local LMSs, open assessment and credentialing, and open business models. Staff training in the above areas is needed in the majority of partner institutions. It is also suggested that the OERu might consider pairing institutions so that they can mentor each other in capacity building and staff training.

Open designs and open planning

There is a strong consensus that respondents place significant value on the ñdistinctively openò planning practices of the OERu. It is the only question in the survey where all options were rated with a statistical mean value of 4 and above (Figure 22). The strong consensus not only reflects agreement on the open paradigm for planning and managing the OERu network in practice, but also reflects the open culture and shared values among members of the OERu community.

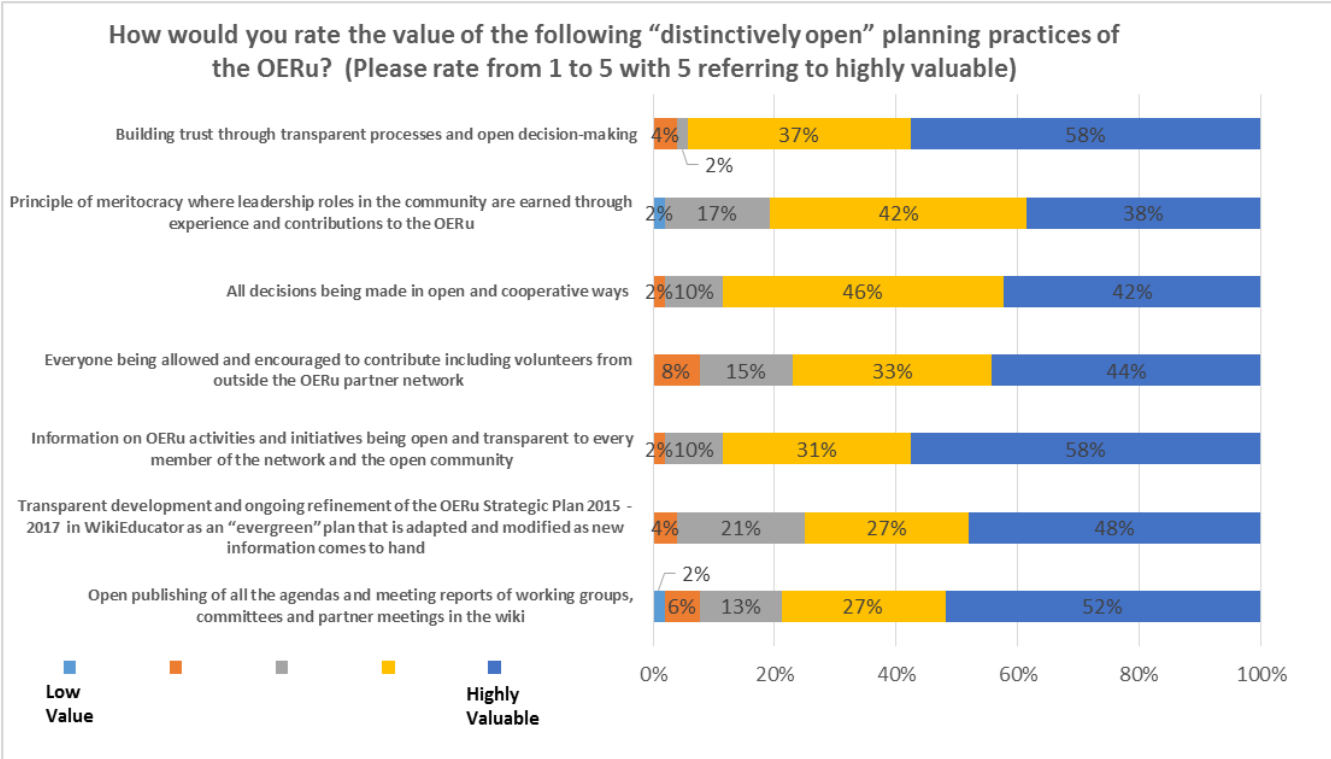


Figure 22

There is a need for top-down approaches in an open community. For example, 94% of respondents express a preference for a top down approach or a combination of bottom-up and top down approaches in decisions related to curriculum development at the programme level (Figure 23); likewise, 69% of respondents expected the OERu network to provide a framework for setting the recommended retail price for assessment services (Figure 24). Another tension that faces open communities is between partnersô accountability (commitment) and autonomy. As a respondent argues:

There has to be greater accountability from partner institutions. It is not good enough for an institution to simply join OERu, it needs to fulfil its membership commitments in a timely fashion.