Building a Manifesto for OER sustainability: UK experiences

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Abstract
Evidence of sustainability, or the potential to achieve this, is increasingly a pre-requisite for OER activity, whether imposed by funders, by institutions requiring a 'business case' for OER, or practitioners themselves - academics, educational technologists and librarians, concerned about how to justify engagement with a unfamiliar, and unproven practices, in today's climate of limited resource. However, it is not clear what is meant by 'sustainability' in relation to OER, what will be needed to achieve or demonstrate this, nor who the expectation of sustainability relates to. This paper draws on experiences of UK OER projects to identify aspirations that those involved in delivering OER activity have for OER sustainability – what a 'manifesto' for OER sustainability beyond project funding, based on OER use, might look like.

Keywords
Open Educational Resources, OER, sustainability, OER projects, UK OER, embedding OER practice, reuse

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Background

Sustainability is a term increasingly used in within education and across public and commercial projects more widely. Reuse, the more effective spreading of the costs of creating a resource by using it on several occasions, or recycling within different contexts, is a societal trend which is often linked with the pursuit of sustainability. The assumption that we have finite resources, and must conserve and reuse to extend the potential of these resources is particularly pertinent in times of budgetary constraint.

This paper draws on literature about reuse of digital online resources, particularly learning objects, and also recent reporting of experiences by several of the UK OER Phase 1 JISC/HEA funded projects (www.jisc.ac.uk/oer). Open educational resources (OER) have been described as 'learning objects with open licenses' (Wiley, 2009). One way of viewing OER is as the logical next step in the progress towards sustainable creation, sharing and use of learning and teaching resources.

Why a manifesto?

The title for this paper is influenced by a workshop event held by the national Support Centre for Open Resources in Education (SCORE) which aimed to capture and share experience and views from29 Phase 1 UK OER programme projects (www.jisc.ac.uk/oer), following the end of the projects' funding at end of April 2010. The event took place on 13 May and wider political events – the hotly contested UK general election – influenced the workshop title. Manifestos, 'wish lists' for the next term, seemed an appropriate hook for this event, as the projects involved in the Pilot/Phase 1 of the UK OER programme (which attracted £5.6m funding) were by this stage aware that an additional £4m funding would be available for future OER projects, with significant restrictions on funding and activity guided by principles of sustainability (JISC, 2010).

Emphasis on sustainability

Evidence of sustainability, or the potential to achieve this, is increasingly a pre-requisite for engaging in OER activity, whether imposed by funders (e.g. in the UK by JISC and the Higher Educational Academy (HEA) in their UK OER projects), by institutions requiring a 'business case', or practitioners themselves - academics, educational technologists and librarians, concerned about how to stretch limited resources and select between multitudinous sources and find the time and motivation to share. It frequently not clear which definition of sustainability should be adopted and pursued, or which interpretations are being overlooked. This paper explores the consequences of this tension between sustainability 'agendas' and identifies 12 aspirations based on practice.

Planning, or providing evidence, for sustainability in OER activity within the timeframe of a funded project is not easy. It is relatively straightforward to appreciate the funders' viewpoint, in being unwilling to maintain a high level of investment in a tight economic climate without prospect of 'sustainability' or self-sufficiency in sight (Parry, 2009). However, practitioners, students, institutions, communities, repositories and support services have differing expectations around sustainability, and differing motivations driving their engagement with OER. The requirement for 'sustainability' of supply is also different from the requirements for sustainability in demand (use)(Wiley, 2007). Although much OER activity is based around short-term projects (12 months for the UK OER projects), business models which could deliver sustainability take time to implement (e.g. Schewer, 2009). The UK Open University's OpenLearn (http://openlearn.open.ac.uk) is now achieving sustainability in terms of supply after nearly four years in operation (McAndrew and Lane, 2010), but is not yet achieving sustained embedded engagement with reuse as part of its mainstream institutional learning and teaching activity). A multi-layered view of sustainability emerges, addressing a variety of stakeholder objectives, which can be supported by examples from recent OER activity in the UK (Pegler, 2010)

What does *un*sustainability look like?

Pegler (2010) has suggested that aiming to achieve giant panda conservation through captive breeding (supply) alone compares to unsustainability in approaches to OER activity. Both can succeed *as projects*, address short-term targets and meet production requirements, as long as funding permits. However, for both sustainability concerns places value on maintaining and increasing activity in the future, with reproduction 'in the wild' and not only under project conditions. The habitat (ecology) which pandas would ideally occupy no longer exists. They can survive and thrive if external effort is directed towards maintaining and protecting them, but not otherwise.

When we anticipate sustainability in OER activity, we are assuming that the ecology of learning and teaching will support these projects in the future without additional project resources, that they will flourish 'in the wild', reproducing and growing (in size and variety) without significant additional project support. Since an OER is not a living organism, it relies upon users to replicate and develop. For sustainable OER initiatives to exist they need to demonstrate sufficient value to users that the user community, rather than the project funders, will sustain the project. Activity beyond, rather than within, the funded project will determine whether it is sustainable in the medium and longer term. However the requirements of project activity aimed at addressing funders' standards of sustainability, for example that no new resources are created (a requirement for the UK OER Phase 1 projects), can influence the likely reusability of the resource, and affect its appeal to future users.

Whose definition of sustainability?

What sustainability will look like, and why it is desirable will differ depending on the viewpoint of the stakeholder. The UK OER projects collectively represented OER activity at individual, institutional and subject centre (discipline consortium) level involving over 80 English higher education institutions (HEIs). Several of the projects by the end of the year were able to offer examples of effective embedding and sustainable OER supply (e.g. UNICYCLE at Leeds Metropolitan University (Thomson, 2010) and U-Now at Nottingham University (Beggan, 2010). While working within the confines of an externally directed project programme, these initiatives can supply recent experience of working within the UK higher education sector, engaged in OER activity directly with practitioners, institutions, funders and each other.

Their views have informed a 12-point initial manifesto for sustainability in OER, which offers general considerations, while also recognising institutional, disciplinary and project differences in approach and requirements. For example, the Medicine, Dentistry and Veterinary Medicine (MEDEV) project identified additional hurdles for supply *and* use to overcome which are particular to disciplines where real patients, or animals may feature in learning and teaching resources. This creates considerations regarding licensing and tracking over the long term, particularly where there is potential for best practice advice to also change (Quentin-Baxter and Hardy, 2010). In addition to anxiety about currency of advice supplied, OER activity within the MEDEV subject community OOER project (http://www.medev.ac.uk/ourwork/oer) uncovered ethical concerns about reusing resources containing patient input, images or information. Although already offered for one type of educational use, versioning as OER raised questions of whether patients would be happy for the content to be repurposed under an open license within different, unpredictable, contexts. Quentin-Baxter suggests that we may need a ‘consent commons’ license to anticipate and address patient’s preferences.

Acknowledging these specific differences, the draft manifesto (available for comment in Cloudworks (www.cloudworks.ac.uk) ‘OER and Sustainability’ cloudscape) identifies considerable common ground, and shared experience from which to build. The twelve points précised below arise from experiences of UK OER projects and illustrate important considerations they share about OER sustainability.

OER and sustainability: A twelve point Manifesto

1. **Recognise the effort and time required to move to sustainable OER**
   Why? Although the efficiencies and other benefits to offset investment can be shown as part of an *in theory* business case for sustaining OER, the activity is unlikely to be self-sustaining *in practice* within the short term.
   For projects in particular, there is only so much that can be realistically achieved in terms of sustainability within short-term projects. Moves towards sustainable **supply** of OER are

already in place within some institutions (Leeds Metroplitan University's UNICYCLE project offers a good example of embedded practice (Thompson, 2010)). Changes towards sustainable **use** will take longer to evidence and achieve. This is the next, longer, ecological stage in OER activity.

2. **Wide exposure of staff to OER (building awareness of supply) is important.**
   Why?Many established staff may never actively engage with OER, we should not expect all practitioners to embrace it. However, this leaves a majority who *could be* convinced to change practice if the incentive was clearly illustrated. One of the most effective ways projects found of converting potential users of OER to enthusiastic users was to show educators OER relevant to *their* practice. There are many examples within the UK OER programme of 'eureka' moments when previously indifferent staff realised that using OER can significantly save *their* time. 'Opening up the VLE' is an important first step to enabling this at the institutional level.

3. **Staff development – ideally accredited by HEA - is key, especially for new academic staff.**
   Why? Leeds Metropolitan University estimates that for most teaching innovations 20% of staff may be impossible to change, up to 50% may try things and could adopt, and 30% are open to change (Thompson, 2010). These proportions may be different for more research-focused institutions, but new academics form a large proportion of the most reachable group (activity within an intensive research-led university, reported by Tom Browne of OpenExeter reinforces this view (http://as.**exeter**.ac.uk/support/educationenhancementprojects/openexeter/))
   Existing teaching practice does not prepare staff for making or using OER. Both can be addressed through accredited training for new teaching staff – activity which is explicitly supported within the UK OER Phase 2 call (JISC, 2010).
   Within any training, whether of new or existing staff, there should be emphasis on making the experience of using OER creative and original. One way this can be achieved is by emphasising the importance of learning design, rather than content creation. Academics need to be confident that they can place their stamp on resources which have originated elsewhere. This may be through repurposing or remixing (Leslie, 2010), but re-contextualisation is a skill whichis not easily acquired (Brosnan, 2006), it needs to be demonstrated and taught.

4. **Sector-wide sharing needs to be encouraged and if possible incentivised.**
   Why? There appears to be a genuine 'multiplier' effect where resource sharing occurs across institutions and through communities. But for much of the OER activity the benefits are ahead of us – through use. Knowing that you can share (e.g. that there are no rights implications or permissions to sort first) opens up opportunities to share. This has impact not only on effective use of costly resources, but also on quality and clarity in resources that we use.
   We need a strong challenge to the current academic model of creating content as the default model. While awareness of the inefficiencies in this can be addressed through development of new staff (see 3) – it also needs to reach more experienced practitioners. Prizes and publicity for the best resources could help provide reward and recognition. The HUMBOX project (www.humbox.ac.uk/) offers an example of how reviews by identified reviewers can assist evaluation and engender trust, raising the profile of creators and users of OER.

5. **Evidence of effectiveness in use would be massively helpful.** **Why?** We don't yet have sufficient convincing sector wide examples of effective use of OER to draw on when making the case for its effectiveness, or seeking to demonstrate the value of OER. Examples are starting to emerge, and evidence from projects such as OpenLearn of usefulness with informal learners and registered students alike are encouraging. But project data can be difficult to access and interpret. Collection and wider dissemination of existing case examples, which support generalisation from projects to other contexts, would be helpful, and research into current and emerging practice remains necessary. Evidence of 'added value'from OER use, of student satisfaction and the impact on learning and teaching practice are particularly sought, ideally recording different types of benefits, for different stakeholders, assessing their value.

   Examples discussed included early evidence from the FETLAR project (http://www.fetlar.bham.ac.uk/) at Liverpool John Moores that OER can help meet the needs of students from un-conventional backgrounds. In a separate group outreach work with learners new to higher education, using OpenLearnOER has been demonstrated as effective preparation for gaining the confidence to enter university (Kohkhar, 2010).

6. **Usable tools (e.g. for dissemination and deposit) to maximise benefit for minimal effort.**
   Why? Do we need to explain?

7. **The move to OER should be widely recognised as good for UK HE**
   Why? Enthusiasm for OER from the highest level within Hefce and the JISC has been received and is welcome (e.g. Read, 2010), particularly welcome is the idea that moving from closed to open content can be viewed as a moral obligation for educators and their institutions. However, engagement in OER is not only about altruism, but also an endorsement of making practice public, which in turn will strengthen education. This should, and may in time, be seen as comparable to the academic imperative to publish research?

8. **Policies and practices which offer clear rewards for 'open' behaviour?**
   Why? Academics can be rewarded directly by the institution for engaging with OER, as part of a wider strategy by the institution to encourage recognition of OERwithin educational practice as inherently rewarding.Thomson (2010) provides an example of embedding OER into policy in this way. Academics at Leeds Metropolitan University can select OER activity as one of their six performance targets, part of the normal annual staff appraisal and development process. At Oxford, the Open Spires experience (Highton and Robinson, 2010) demonstrates how academics can significantly value opportunities to disseminate ideas, and place high value on the opportunity that OER activity offers for recognition of their expertise beyond the institution. Discussions are now underway with the HEA to recognise OER activity as evidence of excellence in teaching for National Teaching Fellowship awards. This move would in turn be likely to influence institutional Teaching Fellowship schemes.

9. **Institutions need to 'turn over stones' even when they fear what lurks beneath**
   Why? This phrase originated from MEDEV experiences, but reflects that of other projects. One barrier to adopting and progressing OER is unwillingness to face the prospect of unpleasantness

(e.g. discovering evidence of copyright infringement). The perception may be worse than the reality, but the fear of facing these concerns is holding back more than OER. It holds back any sharing of resources beyond the students within a face-to-face class context.

Many practitioners do not know how to remedy difficulties that they discover under their 'stones', and lack the time/resource to make the necessary changes. They need advice and help to avoid stressful litigation (e.g. Newman, 2010)

10. **Confidence in our own resources, even when these are 'dirty' (not pristine or polished).**

    A reluctance to share can originate from concerns about the quality of the teaching material. Is it good enough? Beggan (2010)has observed, based on the uNow project (http://unow.nottingham.ac.uk), that there may be a higher quality standards – more anxiety about quality – when academic creators are assessing the suitability of their resources for OER then when they are developing resources for teaching. He points out that higher quality standards may be applied to OER to be given away for free, than for resources to be used with 'paying students'.

    Standards for OER are helpful to users, but these need to span many levels and recognise multiple uses. Raw dirty 'real' learning resources are valuable, particularly where repurposing is permitted. Perfectionism is a barrier, placing undue emphasis on the content rather than its learning potential

11. **Identify and acknowledge the important risks – and prepare for them**

    Why? OER activity is not risk-free in terms of litigation risk. We need to identify and address the potential for litigation and manage that risk through appropriate policies. The OOER toolkits (www.medev.ac.uk/ourwork/oer) offer a structured approach to addressing risks. Their area (medicine) is one with particular risks that suggests the need for development of a 'Consent Commons' and additional tracking requirements. But there will be some risk for all discipline areas and appropriate risk management policies need to be identified and used to overcome these.

12. **Prepare for other creators of OER content**

    Why? If we expand so that students, or others without OER grounding, can contribute OER, how will they know 'our' rules for OER, and will they be willing to follow them? How can we prepare new users who may not be educators or have been actively involved in projects? Sharing OER needs to extend to purposeful sharing of experiences and expertise, which anticipates future OER activity.

    Represented at this workship were the following institutions/projects (full details available at www.jisc.ac.uk/oer: BERLiN, Nottingham University, CETIS, University of Bolton, FETLAR and Liverpool John Moores, GENIE CETL, University of Leicester, JORUM, University of Manchester, Leeds University, OOER, MEDEV Subject Centre and University of Newcastle, OTTER, University of Leicester, SCORE, The Open University, UNICYCLE, Leeds Metropolitan University, University of Bradford, University of Cambridge and University of Central Lancashire.

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Chris Pegler has developed and led several online courses which used and reused learning objects. She is a National Teaching Fellow with broad interests in e-learning and specifically research/practice in reuse of online resources. From 2009-10 she was Academic Director of the national Support Centre for Open Resources in Education (SCORE) and since 2006 she has led/co-led the Open University's 400-strong e-learning community. Chris co-edits (with Prof Allison Littlejohn) the Routledge Connecting with e-Learning book series, within which she co-authored *Preparing for Blended e-Learning* (Littlejohn and Pegler, 2007) and The *Educational Potential of ePortfolios* (Stefani, Mason and Pegler, 2007).

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