Chapter 08. The OER university: from vision to reality

Beyond Distance Research Alliance
University of Leicester

Gabi Witthaus

ABSTRACT

In this chapter, findings from the first phase of the TOUCANS (Testing the OER university Concept: a National Study) project are shared. TOUCANS is a research project based at the University of Leicester, in which SCORE fellow, Gabi Witthaus, investigated the OER university (OERu) and its potential future take-up in the UK higher education (HE) sector. The project ran from September 2011 to June 2012. In this chapter, the first phase of the research, involving interviews with individuals from the anchor partner institutions, is reported on. Respondents commented on the anticipated target audience for the OERu pilot, the institutional processes for making curriculum decisions, options under consideration for approaches to assessment, ideas about how accreditation and credit transfer might be handled, and the nature of support that will be provided for OERu students. Business models for participating in the OERu were also discussed, as were the various institutional and personal motivations for participating in the OERu. Findings from this phase of the research suggest that the OERu might well provide a range of useful models for collaboration around OERs to enable access to higher education on a significant scale in the future.

COLEARNING OBJECTIVES

It is hoped that the chapter will spark discussion within the open education community about ways to build on the OER work that has been done in previous years, in order to meet the global demand for higher education accreditation on a mass scale.

REUSABILITY

This chapter can be reused by anyone leading discussions with others who are interested in the issues, for example as a stimulus for an institutional strategy meeting about internationalisation, as background reading for a staff development workshop on OERs, or as suggested reading for Education students looking at current issues in open education.

KEYWORDS

OER university, OERu, open accreditation, University of Leicester

1. OPENING WORDS

OER1:   What is the OERu?
Author: Thanks to normanack on Flickr
Source: - http://www.flickr.com/photos/29278394@N00/4780268332/
Objectives: To visualise the OERu
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What do you know about the OERu concept? Can you explain the OERu concept, using the above image for inspiration?

In the many discussions I have had about the OERu with colleagues from universities around the world, it has emerged that even though most people have heard of the OERu, not many actually have a clear picture of what it is. I find the above image to be a good representation of the concept. The key points are:

- The OERu is not a single entity. It is a network of institutions (i.e. the web in the picture).
- The thing holding up the OERu is the people at the grassroots – the academics and support staff at the participating institutions, without which it could not succeed.
- Learners who study through the OERu will not receive an 'OERu' qualification. They will get a qualification from one of the participating institutions. The awards given (e.g. degree certificates) will be equivalent to, and will look identical to, the awards given to mainstream students. Future

employers will not necessarily even know that the student studied via the OERu, unless a transcript is required as part of the job application process, in which case it will be clear that the degree-awarding institution accepted a certain number of credits from other institutions in the network.

2. INTRODUCTION

TOUCANS (Testing the OERu Concept and Aspirations: a National Study - www.le.ac.uk/toucans), one of several OER projects at the University of Leicester, is a SCORE fellowship, funded by the Higher Education Funding Council for England, and conducted in partnership with the Open University. The aim of the project is to investigate the OERu concept as a model of collaboration around OERs to enable greater access to higher education. In the first phase of the project (Sept 2011 to Feb 2012), data was gathered from the anchor partners to identify a range of approaches that institutions were considering taking in their efforts to achieve the OERu's mission. In the second phase (March-June 2012), UK stakeholders were asked to consider the relevance of these options and frameworks, as well as the broader vision of the OERu, to the UK HE sector. This chapter focuses primarily on the first phase, and summarises briefly the findings emerging from the second phase and points to further sources which provide more information about the UK higher education responses to the concept.

3 BACKGROUND – The OERu

According to UNESCO (Altbach et al, 2009), there is a demand for over 100 million places in higher education worldwide that will never be met by existing provision, due to capacity constraints on the part of higher education institutions (HEIs) and fees that are unaffordable for the learners. The Open Educational Resources university (OERu), an ambitious initiative aimed at meeting this need, is a partnership of HEIs around the world, collaborating to provide formal assessment and accreditation for learners studying independently from open educational resources (OERs). Fifteen institutions, from New Zealand, Australia, Canada, the USA, India, South Africa and the South Pacific, have joined the OERu network. These institutions are currently in the process of preparing to implement the OERu concept which was originally proposed by Taylor (2007) in terms of a 'parallel learning universe', in a pilot planned to start in the second half of 2012.

The OERu started out as a loose network of interested individuals within several HEIs who felt a personal mission to promote the idea of enabling universal access to higher education through collaboration around OERs. In February 2011, these individuals met at Dunedin in New Zealand to flesh out their ideas and generate a concrete plan of action. In November 2011, the OERu was officially launched, with 15 'anchor partners' (13 teaching institutions and two non-teaching institutions) having made the commitment to test the OERu concept. Subsequent to that, two further teaching institutions joined the consortium. The communication hub for the development of the OERu is a wiki (www.wikieducator.org/oeru), and all decisions and processes are recorded there in a deliberately open and transparent way.

4. DATA GATHERING AND ANALYSIS

TOUCANS used qualitative research methods. 13 people, representing 11 of the teaching institutions and both the non-teaching institutions in the OERu anchor partner consortium, participated in semi-structured interviews via Skype, telephone, Adobe Connect or Google Talk, depending on interviewee preference and the technology available. It should be noted that, in many cases, interviewees were sharing their knowledge of embryonic developments within their institutions, and that not all interviewees had been

involved in all aspects of their institution's OERu work to date. In some cases, they were also speaking in their personal capacities as scholars rather than as representatives of their institutions. The findings presented here therefore reflect some of the early discussions and debates around implementation of the OERu concept, and should not be seen as final decisions or policy directions already determined by the institutions concerned, except where specifically stated as such.

In order to begin to describe the diverse array of models and options under consideration for implementation of the OERu concept, interviewees were asked to comment on the following questions from their institutions' perspectives where possible, or from their personal perspectives where no clear-cut decisions had been made by their institutions:

1. Who are the OERu students likely to be?
2. How are curriculum decisions being made?
3. What options are emerging for OERu assessment?
4. How are OERu anchor partners planning to handle accreditation and credit transfer?
5. What kind of support will OERu students receive?
6. What is the business model for participating in the OERu?
7. Why did your institution join the OERu?

In the analysis stage, the key points emerging from the interviews were manually organised under thematic headings and shared with the open education community in the form of mind-maps in conference presentations and via the blog (for example at http://tinyurl.com/oeru-from-vision-to-reality). Feedback was received through this ongoing process of dissemination, and the analysis updated accordingly.

5. FINDINGS

5.1. Who are the OERu students likely to be?

For some of the people interviewed, the as-yet undefined, mass-scale international audience of 100 million mentioned by UNESCO (Altbach et al, 2009) was the target population for their institution's OERu offerings. Others had a more defined and localized audience in mind. For example, a major focus for the US-based institutions was the estimated 23 million adults within the US alone (US Department of Education, 2011, p22) who are 'underserved' in terms of higher education, including large numbers of work-based learners who could be reached via partnerships with employers. Within New Zealand, Australia, Canada and South Africa, there was also a high degree of commitment to using the OERu to reach out to local communities who currently have little or no access to higher education.

There was also mention of the OERu potentially playing a role in increasing the existing customer base of some institutions. For example, in the US- and Canada-based institutions where recognition of prior learning (RPL, also known by the term Prior Learning Accreditation and Recognition, or PLAR) is well-established, the OERu may well provide the structure and support needed for RPL applicants to submit a higher quality portfolio, thereby increasing their chances of success. There is also curiosity within some institutions to see whether the OERu might lure potential fee-paying students who want to 'try out' formal education without the large financial commitment that is traditionally required. Such students might later enrol on a fee-paying basis for courses that are not (yet) offered via the OERu.

5.2. How are curriculum decisions being made?

The curriculum is probably the least contentious of all issues under discussion within the OERu consortium, since it was the concept of offering services around an OER-based curriculum that united all

the partners in the first place. However, although there is a wealth of existing OERs already available on the Web, additional work needs to be done to make these resources suitable for OERu students, for example, including information about learning pathways and assessment requirements, with reference to specific courses or programmes and related assessment opportunities provided by the relevant anchor partners.

Bearing this need in mind, the participating institutions have three choices: they can use OERs produced by their own institution; they can use OERs produced in collaboration with other anchor partners; or they can use OERs produced elsewhere. Most institutions have gone for the first or second option for the pilot; however, a few are considering using OERs produced by another OER initiative, the Saylor Foundation (http://www.saylor.org/), an independent, non-profit organisation that provides OERs written by 'credentialed professors' (Saylor Foundation, 2012). This has led to some rather intense debates within institutions about the acceptability of offering a course that has not gone through the usual institutional quality assurance and validation processes. From the point of view of the OERu philosophy, it could be said that this argument is irrelevant, since students will be accredited according to their performance in the (institutionally-approved) assessment, regardless of the learning materials they used to achieve that competence. However, for some stakeholders in universities that are used to operating in traditional ways, using externally produced OERs may be a step too far.

In this research, the interviews provided some indicative evidence of the paradigm shift that the OERu is generating within higher education. At the core of the OERu is the notion that the disaggregation of teaching, content and assessment – traditionally the three pillars of an educational institution – will enable access to higher education on a vastly greater scale than is currently possible, and that this disaggregation is now possible because of the existence of openly licensed content, combined with a global network of willing institutional partners. As some interviewees pointed out, this requires a totally new mindset on the part of all stakeholders – not least senior management and the Marketing Department of participating institutions. (See section 6 for further discussion.)

5.3. What options are emerging for OERu assessment?

Some of the OERu anchor partners have very established recognition of prior learning (RPL) programmes (or PLAR programmes as they are called in North America – Prior Learning Accreditation and Recognition), or work in partnership with other organisations that handle this for them (such as CAEL – Council for Adult and Experiential Learning – in the USA) and so RPL is one obvious approach to assessment within the OERu. However, it was also clear from the interviews that the concept of RPL was not very well defined in some institutions. Otago Polytechnic's (2011) RPL policy, which has been published online under an open licence, was mentioned by several respondents as a benchmark and potential model for those institutions that do not yet have well-developed policies in this regard.

Another approach to assessment was the notion of 'challenge exams', which involves offering students the option to sign up for an exam without having enrolled in the course. This is already established at some institutions such as Athabasca University, but is not widely taken up. Offering challenge exams on a large scale will therefore be experimental, even for those institutions with some experience. The option for offering students monitored, at-home exams is also a potential future possibility, and with technological advances this is not outside the bounds of imagination. However, the question of identity validation is of concern, and it is unlikely that any form of remote assessment will prioritized for the OERu until this can be resolved.

Another form of assessment being considered by the anchor partners is standard assignments or essays, possibly identical to the ones being used for fee-paying students. Some institutions are also considering offering work-based assessment, in partnership with employers.

5.4. How are OERu anchor partners planning to handle accreditation and credit transfer?

Answers to this question ranged from fairly open approaches to fairly restrictive ones. Some institutions allow a majority of credits to be transferred from other institutions. For example, in some cases, students need only 32 out of 128 credits to come from the accrediting institution. In other cases, up to 80% of the learning outcomes (in a course done at another institution) need to be identical to outcomes in a course offered by the accrediting institution. Those institutions with more restrictive credit transfer policies are engaged in internal discussions about this, and it is possible that one impact of participating in the OERu will be the revision of such policies.

5.5. What kind of support will OERu students receive?

This question elicited a wide range of thoughtful and often passionately-held views. Considering that the OERu was set up as a low-cost, no-frills alternative to traditional higher education, the ideal OERu learner was summed up in the words of one person as being 'a self-contained student who is going to resolutely keep persevering.' In other words, someone who does not make great demands on the institution's resources. It was recognized by all, however, that students would need some form of support.

As a starting point, the OERu partners have agreed on the importance of having support embedded in the materials, at the very least in terms of recommended learning pathways, reflection activities, assignment writing guidelines, and clear, transparent information about the nature of the assessment process.

A further solution under consideration is the concept of 'Academic Volunteers International' (AVIs). AVIs may include retired academics, existing tutors who have spare time and, in time to come, OERu graduates who wanted to 'give something back' to the network. It is generally agreed that these volunteers need not be subject matter experts, but should be able to assist students with digital literacy skills development, assignment writing and other aspects of the learning process that are relatively generic. The question as to how scalable, and how sustainable, this volunteer approach will be remains open.

While there is no intention at this stage to have a virtual learning environment for the OERu as a whole, most of the institutions are considering ways of providing platforms for student-driven social networking, including the possibility of using externally created open platforms such as OpenStudy (http://openstudy.com/) or the OU's OpenLearn (http://openlearn.open.ac.uk/). The open source software community was cited as a model for peer support – with recognition that participation in online help forums requires a level of digital literacy which cannot be assumed of all OERu learners.

Some interviewees saw opportunities to use existing resources, either within their institutions or within their regions, for student support. For example, some institutions already have RPL/PLAR mentors, who are employed to assist applicants in assembling their portfolios, and these mentors could offer their services on a wider scale for the usual PLAR fee, which is set at a fraction of the cost of full enrolment for learners. In some cases, there are also funded community outreach centres in existence, already offering literacy and other skills development programmes to local communities, which could potentially support OERu learners. In the case of workplace-based OERu learners, there would also be an existing support structure involving managers and mentors. Again, it is difficult to predict how sustainable such support mechanisms might be when working on a mass scale.

One option that was tentatively suggested by a few of the interviewees was the possibility of including OERu students in the forums (and possibly even classrooms) that have been set up for fee-paying students. However, it was noted that this might raise complex issues – including the possibility that the mainstream students might begin to wonder why they are paying fees. Other potentially contentious suggestions were 1) that OERu students might be willing to pay an occasional 'fee-for-service', for example, a one-to-one session with a tutor to help them with an assignment, and 2) that an institution might 'cap' the number of OERu students on a given course. It was recognized that these ideas ran

somewhat counter to the spirit of the OERu, but at this stage in the OERu's development, all options that might contribute to the viability of the initiative from an institutional point of view are up for discussion.

There is also some talk of creating automated support for learners, for example, building up an FAQ database to help learners with predictable questions, or providing targeted information to specific learners based on learning analytics. (In a workshop at the Open University in February 2012, Andrew Law, Director of Multi-Platform Broadcasting at the OU, reported that, in a study into learner perceptions of automatically generated feedback, students felt genuinely excited about the feedback they were receiving. One even said, "Now I know that I am not just a number any more!") This is clearly an area where we can expect to see developments in the future, and its impact on the OERu is likely to be substantial.

5.6. What is the business model for participating in the OERu?

It was agreed at the launch meeting of the OERu in November 2011 that obtaining a credential via the OERu should cost students a maximum of 25% of the usual fees. It was also suggested that OERu courses should constitute less than 0.5% of an institution's total offerings. This severely limits the financial risk for participating institutions – while also highlighting the importance of collaboration in order to be able to ultimately provide a substantial range and number of courses and programmes for OERu learners.

Because of this low-risk approach, interviewees indicated that the OERu was not perceived as a threat to their business models. Some said they planned to cross-subsidise from established, successful programmes at their institutions, in order to fund the OERu development and implementation work. Some said they would build on existing, self-sustaining processes (for example, the RPL service offered by some North American institutions, mentioned above). Some expected to receive government funding or foundation sponsorship for their OERu work. In some cases, OERu learners are likely to be able to receive government grants.

In many cases, there is also an explicit or implicit expectation that the OERu will lead to greater enrolment numbers in the long run. This is expected to occur not only as a result of the greater Web presence and newsworthiness of their participation in the OERu, but also as a result of more students experimenting with formal higher education through the OERu, and then making the commitment to study further. This idea of the OERu as a stepping stone into formal, fee-paying higher education is, of course, only viable to the extent that the OERu itself remains small and limited in its scope of offerings. One can imagine a future where more and more institutions join the OERu, providing ever more courses and credentials, thereby eventually eliminating the need for students to pay fees at all. Should this transpire, the paradigm shift will be complete, and radical new business models for higher education will certainly be needed.

5.7. Why did your institution join the OERu?

Without exception, all the interviewees stated that curiosity was a major motivation, and several mentioned a desire to 'dip a toe in the water' – experimenting with the power of collaboration around OERs to enable access to higher education on a massive scale – and watching closely to see what would transpire. Several mentioned the importance of the higher education sector finding new models for sustainable education practice. All the individuals I spoke to indicated a strong personal desire to, as one person put it, 'be of service to the world'. This was in line with their institutions', and often also governments', social inclusion and community service or outreach agendas.

For some, it was a deeply political personal mission too, perhaps most eloquently summed up in the words of one interviewee, who said, "We are fighting off the dogs that want to keep knowledge a privilege". Some also mentioned the desire to use the OERu as a platform to meet workplace needs on a large scale, in partnership with employers. There was also a perception amongst some that the OERu would be a powerful marketing platform – positioning the participating institutions as world leaders in a whole new phase in the history of higher education.

Last, but by no means least, the collaboration facilitated by the OERu played an essential role in influencing institutions to participate. Collaboration enabled the obvious sharing of resources (as one person put it, 'We put in one course, and we get seven out'), as well as benchmarking practice against other institutions, opportunities for staff development through participating in discussion forums, efficiency, policy sharing, and quality improvement. The OERu also provided a way of reducing perceived isolation – not only institutionally but regionally. One person said, 'Our country is pretty darned isolated. It's time for us to join the world' (referring, incidentally, to the USA).

6. COLEARNING ACTIVITY

Inserir Imagem OER02

The OER university: Enabling universal access to higher education from Jason K Myatt on Vimeo.

OER2:   The OER university: enabling universal access to higher education.
Author: Prof. James Taylor, University of Southern Queensland.
Source: http://vimeo.com/37933801
Objectives: To introduce the concept of the OERu
License: CC-BY

In this video Prof. James Taylor, from the University of Southern Queensland (USQ), one of the founding members of the OERu, describes the OERu concept and outlines how participating institutions are planning to implement it, giving examples from USQ. The video was a contribution to a series of Open Education Week webinars hosted by the TOUCANS project at the University of Leicester in March 2012.

A few questions to think about while you watch:

- What do you think of the idea of a pedagogy of discovery – or 'free range learning', as Taylor calls it? (For further discussion of this idea, see the blog post by Prof. Pam Ryan at http://tinyurl.com/free-range-learning.)
- Taylor refers to the need for OERu learners to gain 'learning literacies for a digital age'. What do you think these literacies are, and how are they best learnt? (If you want to explore this area in more depth, you may find the free e-book by Martin Weller, 'Digital Scholar, to be of interest: http://tinyurl.com/digital-scholar.)
- Taylor's concludes his presentation by saying, 'For institutions, the OERu is high impact low-risk.' From what you have learnt about the OERu, to what extent do you agree with this statement? (If you are interested to read more about what people in UK HEIs that are not participating in the OERu have said about the concept, you may find some of the blog posts at http://toucansproject.wordpress.com/category/uk-hei-interviews/ of interest.)

7. THE UK HEI RESPONSE

 In phase 2 of the project, the findings from the interviews with the OERu network members were shared with UK higher education community, and senior managers and practitioners were invited to give their views on the OERu concept. Eleven interviews were held with selected thought leaders in the sector, and

a survey was sent out to staff actively involved in OER projects in institutions around the UK. 42 responses were received to the survey. This phase of the research was reported on at the Higher Education Academy's Annual Conference in July 2012, and a discussion of this session and link to the slides can be accessed from http://tinyurl.com/oeru-snog-marry-avoid.

In summary, the responses from both senior managers and practitioners ranged from a tentative interest in the concept to outright rejection of it. On the positive side, many respondents were, in principle, in favour of the philanthropic mission of the OERu, and they could also see a potential benefit to their institutions in terms of enhancing their profiles in the global HE market. On the negative side, it was the anticipated that the requirements of the UK's regulatory body, the Quality Assurance Agency (QAA), would provide a major stumbling block in terms of collaborative provision of courses. Concern was also expressed about the lack of structured, academic support for learners, and a number of respondents felt that the OERu concept placed too much emphasis on content and assessment, and not enough on learning processes. There was also some scepticism about the perceived intention of the OERu to impose Western academic traditions on learners in developing countries. Finally, and most influentially, perhaps, there was an air of uncertainty about the future of HEIs, provoked by the fee increases of up to 300% for students in England that will be implemented from September 2012. Many respondents noted that, under the circumstances, it was an inappropriate time for institutions to be considering taking additional risks by embarking on what is, to all intents and purposes, an altruistic project.

While there is clearly a great deal of interest within the sector for finding a way to capitalise on the recent efforts of OER production and release, the OERu is not seen as the answer to that dilemma at the moment.

8. FUTURE RESEARCH

The findings reported on in this chapter represent a snapshot both of the thinking around the OERu concept both from within the OERu network, and from the UK HEI sector, where no institutions are yet members, in July 2012. Open educational practices are taking place within a developing and constantly changing environment globally, and the picture for UK higher education could look radically different a year down the line – once the impact of the fee increase can be gauged – or at any point in time if just one prestigious institution joins the OERu network, thereby possibly causing others to rethink their stance on the subject. Anyone interested in making use of the TOUCANS research findings needs to view them in the context of ongoing developments in the field.

The question, 'Where to next' with the open educational agenda is an important one for HEIs that have actively participated in OER projects in recent years. The OERu is one possible answer that clearly appeals to some institutions, but there are many factors to be considered and many other possible answers. Further research focusing on this question would be of benefit to the whole higher education sector.

9. CONCLUSION

From the data gathered from the OERu network members it is clear that, in the space of just over a year, the OERu has grown from a bold vision to an imminent reality. It has grown, not of its own accord, but as a result of the dedication and efforts of its founder members. Research participants indicated that achieving the OERu's ambitious, humanitarian vision of vastly increased access to higher education requires a commitment to collaborative effort and openness towards new ways of thinking. Some of them stressed that the key to success lay in an ability to imagine a future in which the traditional pillars of

education provision – content, instruction and assessment – are disaggregated. As the partner institutions prepare to pilot this radical new approach to higher education, they are experimenting with options and frameworks for curriculum design and delivery, assessment, accreditation and student support that may be useful for other institutions seeking to participate in this, or similar, initiatives aimed at widening access on a massive scale within the higher education sector. HEIs in the UK will be watching with interest to try to determine whether the benefits of participating in this initiative would outweigh the risks for them.

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Institutions that participated in the survey: Bournemouth University, Coventry University, De Montfort University, Institute of Education (London Knowledge Lab), King's College London, Leeds Metropolitan University, Loughborough University, Middlesex University, Newcastle University, Open University, Southampton Solent University, University of Bath, University of Cambridge, University of Huddersfield, University of Leeds, University of Leicester, University of Manchester, University of Nottingham, University of Oxford, University of Southampton, University of Surrey, plus eight others that requested anonymity.*

* Where two or more people responded from a single institution and at least one respondent requested attribution for the institution, the institution is named in the above list.