

Does open education shed new light on the persistent, hard problems of education with respect to access and quality, and perhaps offer new solutions? Does it provide a fresh look at the practice of education, necessitated by the flatness and fortunes expected of the new global dynamics of mobility and emerging economies? And, at the very least, what new pathways for education's agenda of continuous improvement does open education offer?

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Opening Up Education: The Collective Advancement of Education through Open Technology, Open Content, and Open Knowledge,
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ABOUT THIS DOCUMENT

The OPEN Forum 2008 convened a group of higher education leaders for discussion and action to further the strategic impact of openness in higher education. Through the course of the conference participants shared perspectives and priorities both verbally and electronically through the use of the Thanos Partners strategy lab. This document contains results captured through the strategy lab.

The document includes two broad sections.

Introduction

The introduction captures high-level institutional challenges and participants' vision statements of the benefit of openness.

Open Initiatives

Participants answer three specific questions for each open initiative:

1. How does the open initiative benefit your institution in addressing the hard questions?
2. What are the policy and cultural obstacles?
3. What concrete actions must be taken?

These questions are addressed for open educational resources, open access to scholarly publishing, open textbooks, and open source software. There is a slight variation in the questions for open source software, which is highlighted in that portion of the document.

There are several points that are useful to keep in mind when reviewing this document.

- Each activity began with participants brainstorming together. The lists shown are the verbatim comments of participants that were generated real-time. The result is the collaborative genius of the moment rather than a carefully edited work.
- The rankings show a prioritization of the full list by all participants. In each case participants rated the items relatively as high, medium or low. The responses were then ranked based on the average score.
- In order to create a manageable document and focus the resulting efforts, only the highest "ranked" items (those with the highest average score) in each area are included.
- Finally, this document does not include the additional richness that resulted from the speaker presentations and the verbal discussion. The summary of all elements is captured in a slide presentation.

INTRODUCTION

THE PERSISTENT, HARD QUESTIONS

The list of issues below shows the most important institutional issues identified by participants. These problems are not unique to nor resolved specifically by openness in higher education. Specifically, participants answered the question, "What are the persistent, hard problems facing your institution?" Participants then prioritized the full list of problems.

Rank	Issue
1	Affordability and access to higher education Make education affordable Affordability and access to higher education
2	Dire financial problems based caused by downturn in economy The state of California is heading into unknown territory with state revenues declining and a severe cash crunch this academic year. All state sponsored entities will have to cut in the middle of the year; California Community Colleges will cut approximately 10 - 20%.
3	Keep students engaged
4	How can institutions collaborate to achieve scale to reduce costs?
4	How can institutions motivate faculty to adopt new methods?
6	Effectively share resources from other institutions
7	Resource constraints
8	There is too much cost in running the institution At every level relative to public and governmental pressures for reform.
8	Ensure sustainability of collaborative efforts
10	Incentives for faculty contributions to instructional resources How can we motivate faculty, especially those beyond the vanguard, to create, contribute to, (even adopt), quality online educational resources? I'm coming from the California Community College system. Most of our materials are created independently by faculty - a highly un-leveraged model. While some renegades (to use John Seely Brown's term) have contributed their materials in the spirit of collaboration and innovation, there are many, many more with the "wiifm" (what's in it for me) model. I've seen this in many other environments - including the R1 universities, and non-profit organization contexts. What are some successful approaches to this - especially that build on the collaborative / Web 2.0 (or Scholarship 3.0) models?
10	How do we pay for innovations required to transform teaching?
12	In the midst of this budget crisis it is an opportunity to further Open?
13	Providing modern, common tools and software with minimal investment
13	Engaging faculty/administrators in meaningful discussion of change

THE POTENTIAL OF OPENNESS IN HIGHER EDUCATION

Is there a benefit that open can provide in addressing these issues and truly improving education? Each participant identified a vision for the benefit that open is capable of providing. Specifically, if we achieve the full benefit from open, what will be different? Responses below are a sampling of individual vision statements submitted by participants. They were selected because they are representative of the full range of statements submitted.

“Flexible education to suit learners with different learning needs. Style that blends the virtues of traditional education with the affordances of open networked learning for the next generation of learners leading to affordable, quality education for all.”

“Adoption of open textbooks, software, scholarly journals, etc. exerts economic pressure on suppliers that forces innovation. Suppliers offer products that are higher in quality and lower in price, and open licensing of those materials ensures quality and price are kept under control. Open gives adopters choices - whether that is authors of scholarly research, faculty who use textbooks, or institutions who use technology. They have free license to innovate, and release that innovation back into the commons, but they also have the ability to stay with the traditional methods until they feel comfortable changing. In other words, the transition from the "same old" materials that are open to the "new" possibilities of open should be market driven.”

“The vision of an open education space would provide an educational experience that prepares the student with tools to succeed in the future workplace and supports the development of lifelong learning through the development and incorporation of social networks integrated to disciplines. Central to the creation of this framework is the incorporation of a mechanism that drives the continual improvement of educational content and the ability to match it to the needs of a learner. The development and deployment of this framework should dramatically lower the cost of the educational environment and make it available to a wide range of learners and students, crossing social and geographic boundaries.”

“An environment of learning and discovery that recognizes contributions and innovation would truly be an achievement. If we can break down our own silos across and within our institutions by sharing information, research and instructional modules, our students would have a sea of resources to access in their learning careers. Today's resources lie mostly outside educational institutions but they use them anyway. Wouldn't it be great if the top of the list of Google were resources that represent higher education.”

“My vision would be that the higher education administrative and academic software become a low cost commodity that is offered somewhere in the cloud. Course material can be assembled with a magic revenue stream going directly to the authors. Course delivery options would be based on the individual student with virtual "agents" negotiating for the student. Service and support would be provided by the community and vendors. This will allow more investment in the core purpose of teaching and learning.”

“There is a means and an ends (or a value and a values) answer to the question of what "full benefit" would mean. From a value perspective, Openness can create more efficient markets--for academic software, for textbooks, for degree credits, for ideas--that can lower the transaction

costs involved with the business of education and research. From a values perspective, Openness can make sure that the maximum resources allocated toward the betterment of humankind through knowledge sharing and knowledge creation will be used effectively toward those goals and control the level of conflict of interest that the profit motive can introduce.”

“The vision of successful learning is an experience (or environment) whereby the learner is motivated to proactively interact with knowledge bases and discourse beyond their immediate community. The discussion and total experience will engage a students' curiosity and motivation to continue toward goals they continue to articulate during the learning process.”

“An educational systems and services that support life long learning, launches early learning (k-12) that supports a wide range of students at a "doable" cost. Provides advanced educational choices (CC, University, Professional school) that meet the needs of individuals and the workforce, with lower hoops to success. Live long learning to support broader community building. :)”

“Openness in higher education will be a critical component and accelerator to creating a culture of learning - a culture that will support the constant changes we will experience in our emerging 21st century global world.”

“We can reduce the cost of higher education in terms of course materials; we can empower scholars (citizen-scholars, researchers, student-scholars) with unfettered access to the research record and tools; we can share and innovate on the core software for administration /teaching / learning in ways that ensure reasonable costs and control of destiny (i.e., more money in the academic treasury).”

“Education will have a much broader reach. Students will be exposed to many different cultures and perspectives. Greatly help less privileged areas and schools to jump start their education level.”

OPEN INITIATIVES

OPEN EDUCATIONAL RESOURCES

Benefits

How can OER assist your institution in addressing the hard problems?

Rank	Benefit
1	Reduce Cost
2	Increase access to quality educational content
3	Can bring in creative teaching ideas - the best of the discipline
3	Improve student access to learning material
3	Engaging faculty in conversations about pedagogy
6	Lower the cost and increase the quality of course content
6	Peer review of instructional content
6	Engage students in the creation/refinement of resources
6	Allow faculty to better share teaching expertise

Obstacles

What are the policy and cultural obstacles?

Rank	Obstacle
1	Intellectual property issues
2	Funding
3	Not rewarded in most tenure processes
3	"Finding" OER There are hundreds of projects, repositories, etc. with millions of objects. Faculty need to be able to find them easily or else they become completely turned off to the entire concept.
5	Developing a shared infrastructure that fosters discovery, sharing, and reuse
5	How to pay faculty to share course content
5	No strong leadership or guidance

Steps Forward

What concrete actions must be taken internal to your institution, across institutions, and by other organizations (policy makers, state legislatures, funding bodies and corporate entities)?

Rank	Action
1	Lobby for government policies to support OER
2	Offer training for faculty to find, incorporate and improve OER
2	Development of standards for content, structure and effectiveness

OPEN ACCESS TO SCHOLARLY PUBLISHING

Benefits

How can open access to scholarly publishing assist your institution in addressing the hard problems?

Rank	Benefit
1	Allow scholarship to be accessed by ALL Removes the barriers for incidental use.
2	More flexible in pushing the publication to a variety of audiences
3	Broader access - reduced cost
3	Reduce publishing cycle time
5	Enables scaled curricula, of higher quality, that better meet the needs of students
6	Cost savings!

Obstacles

What are the policy and cultural obstacles?

Rank	Obstacle
1	Copyright protection concerns
2	Faculty buy-in
3	How to build a sustainable business model
4	Inertia
4	Lack of publisher cooperation
4	Entrenched oligopoly

Steps Forward

What concrete actions must be taken internal to your institution, across institutions, and by other organizations (policy makers, state legislatures, funding bodies and corporate entities)?

Rank	Action
1	Revise tenure and publication policies to support/encourage open access
2	Active/real endorsement of key disciplinary associations
3	Establish university's right for archive and use After a number of years for first publication
4	Develop a sound business model Needs to be acceptable to publishers
4	Organize top respected academics to lead the movement

OPEN TEXTBOOKS

Benefits

How can open textbooks assist your institution in addressing the hard problems?

Rank	Benefit
1	Offset rising student fees by lowering textbook costs
1	Lowering the cost of education
3	Cost containment for higher education generally; better access
3	Demonstrate that we are a student-centered campus
3	Reduce the barriers for underprivileged scholars to learn
6	Faculty can adjust texts to meet specific, local needs

Obstacles

What are the policy and cultural obstacles?

Rank	Obstacle
1	Faculty resistance
1	Business model is not defined Who makes money? How will it be computed and collected? Music industry is struggling with this problem and might offer some insight.
3	Building infrastructure to support the new model
4	Our bookstore is a profit center that provides revenue to non-profit centers
4	Removing a real source of revenue for key faculty

Steps Forward

What concrete actions must be taken internal to your institution, across institutions, and by other organizations (policy makers, state legislatures, funding bodies and corporate entities)?

Rank	Action
1	Development of a business model that makes sense to the stake holders
2	Someone has to take a leadership role on campus
2	Approach Amazon about creating an education store for open content
4	A consortium/coalition to coordinate actions (in other areas as well) Such a consortium would naturally partner with librarians, who are starting "Scholarly Publishing" functionalities and who also have expertise in organizing information. Concrete goal: organize a conference of librarians, faculty and administrators by summer 2009.
4	Seed money - Mellon grant for matching funds to create open textbooks
4	State systems to lead in Open textbooks

OPEN SOURCE SOFTWARE STRATEGIES

Benefits

How can adopting or investing in open source software assist your institution in addressing the hard problems?

Rank	Benefit
1	Applications that better fit higher education
2	Improves institutional ability to customize based on local needs
2	Lower total cost of ownership permits higher priority resource allocation
3	Improve the affordability of higher education
3	Ensure a greater degree of control of destiny for higher education
3	Allows more rapid innovation and localization
3	Opportunities to learn about other schools' processes and practices
3	Software reuse between institutions
3	More likely to be based on open standards than commercial software

Obstacles

What are the policy and cultural obstacles?

Rank	Obstacle
1	Worry that open source will not be sustainable
2	The perception that it is riskier than going with a vendor
3	Trust
4	Poor procurement practices in higher education Procurement processes in higher education
4	Lack of understanding of benefits and risks

Steps Forward

What concrete actions can be taken by corporate entities to support institutions that are adopting or investing in open source software?

Rank	Action
1	Publish implementation costs - case studies
2	Subscription model for "certified higher education community software"
2	Quick start deployment solutions offered by commercial vendors
2	Develop, model, publish, and promote healthier procurement processes
2	Have a specific university/industry forum to map out a new support ecosystem

Note: The question for steps forward with open source software specifically addresses steps that corporate partners can take to support institutions in their adoption of open source software.