

# The OPEN Forum Session Summary

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The intent of this presentation is to capture the discussion from The OPEN Forum 2008. While the presentation may be shared broadly, it was created with a goal of supporting further dialogue and action among the conference participants.

The content does not represent the perspectives or opinions of all participants.

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# Benefits of Openness



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# What are the Persistent, Hard Problems to Address?

- Financial challenges
  - Affordability
  - Reducing costs
  - Funding innovation
- Cultural transition
  - Engaging faculty
  - Enabling scale
  - Creating the vision
- Engage and develop students

# Openness Creates Unique Opportunity

- Financial Challenges
  - Open allows us to deliberately evolve financial models, creating greater value (quality/cost) and control for institutions
  - Open creates cost reduction opportunities that directly impact affordability of higher education\*
  - Open creates the framework to share costs and benefit from scale across the higher education community
  - Open initiatives drive an immediate reallocation of costs, with savings realized over a five-year period\*

\* Data required

# Openness Creates Unique Opportunity

- Cultural Transition
  - Open provides the methodology and vision for institutions of higher learning to become vibrant, evolving learning institutions
  - Open creates cultural change by reducing financial incentives that are misaligned with the mission of the academy
  - Current open initiatives provide both proven and emerging opportunities to increase meaningful collaboration and leverage our collective knowledge and resources

# Openness Creates Unique Opportunity

- Student Engagement
  - Open creates opportunity to continually improve the breadth and quality of educational content and materials, better matching learner needs
  - Open elevates the student's experience, actively seeking and defining educational content and materials
  - Open creates an environment of sharing, learning and discovery that recognizes contributions and innovations
  - Open creates a framework to engage learners beyond the traditional student and campus – anyone who desires to learn

# Obstacles to Change



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# Obstacles to Positive Change

- Current Financial Models
  - Institutions lack immediate funding to invest in new models that will result in long-term cost savings
  - Institutional financial incentives create resistance to change
    - Faculty textbooks royalties
    - Bookstore profits
    - Remuneration for new or different activities
  - Industry-wide financial models support an entrenched oligopoly with powerful incumbents
    - Requires sustainable new business models
    - Requires new ecosystems that support corporate interests aligned with higher education's best interest

# Obstacles to Positive Change

- Institutional Culture and Processes
  - Faculty culture and rewards do not reward openness
    - Open practices are not rewarded in tenure processes
    - Absence of incentives for sharing or re-use of content
  - The role and reputation of the university presses do not evolve easily
  - Inertia results from a lack of understanding, interest or motivation to change
  - Procurement processes support traditional vendor roles
  - Cross-institutional sharing requires new processes, rewards and trust

# Obstacles to Positive Change

- Systemic Infrastructure and Legal Obstacles
  - Evolving Intellectual property and copyright laws require a current interpretation
  - Leadership and guidance is needed to support institutional leaders in evaluating and implementing open practices
  - Infrastructure is needed to ease the process of finding open resources
  - Standards for content are needed to ease sharing
  - Quality assurance processes are needed to assist consumers of open content and textbooks

# Concrete Actions to Create Progress



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# Highest Rated Actions

Initiative	Actions
Open Educational Resources	<ul style="list-style-type: none"><li>▪ Lobby for government policies to support OER</li><li>▪ Offer training for faculty to find, incorporate and improve OER</li><li>▪ Develop standards for content, structure and effectiveness</li></ul>
Scholarly Publishing	<ul style="list-style-type: none"><li>▪ Revise tenure and publication policies to encourage open access</li><li>▪ Actively endorse key disciplinary associations</li><li>▪ Establish the university's right for archive and use</li></ul>
Textbooks	<ul style="list-style-type: none"><li>▪ Develop a business model that makes sense for all stakeholders</li><li>▪ Create a leadership role on campus</li><li>▪ Approach Amazon about creating an education store for open content</li></ul>
Open Source Software	<ul style="list-style-type: none"><li>▪ Publish implementation cost case studies</li><li>▪ Create a subscription model for "certified higher education community software"</li><li>▪ Create quick start deployment solutions offered by commercial vendors</li></ul>

# Committed Next Steps

1. Broadly communicate the information shared at The OPEN Forum
  - a) Create a collaboration site
  - b) Provide presentation and discussion content to all interested
2. Create leverage in the planning and actions across institutions
  - a) Capture plans and recommendations of each participant
  - b) Identify opportunities for leverage
- c) Engage participants in the development of published article or whitepaper to increase the quality of the narrative about openness with higher education executives