# OEP as a Catalyst for Innovation

## The ENCORE+ Innovation Evaluation Framework

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# ENCORE+

ENCORE+ is a Knowledge Alliance project funded by the European Commission under Erasmus+

Supporting the uptake of open educational resources (OER)

Catalysing and sharing innovative practice across education and business

Developing stakeholder communities for knowledge exchange
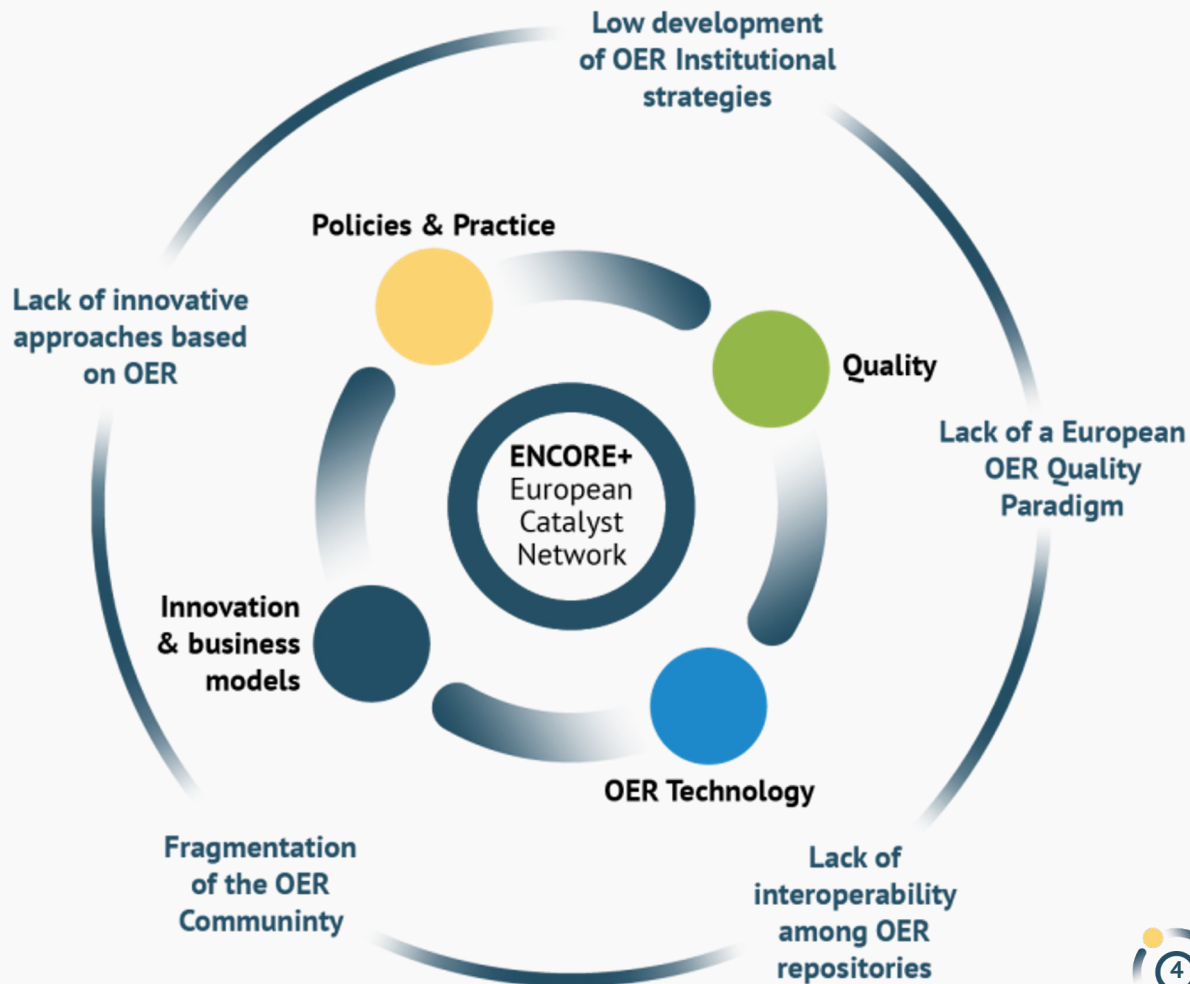
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# Partners



- International Council for Distance Education (Norway)
- Baden-Wuerttemberg Cooperative State University (Germany)
- The Open University (UK)
- Universidad Internacional De La Rioja (Spain)
- Knowledge 4 All Foundation (UK)
- Joubel (Norway)
- Fondazione Politecnico di Milano (Italy)
- Instructure Global (UK)
- Dublin City University (Ireland)

# ENCORE+ Ecosystem

ENCORE+ functions as a **network catalyst** for a socio-technical ecosystem.

ENCORE+'s main mission is to amplify existing OER initiatives, projects, platforms and networks by integrating them across the four thematic strands.



Low development of OER Institutional strategies

Policies & Practice

Lack of innovative approaches based on OER

Quality

ENCORE+ European Catalyst Network

Lack of a European OER Quality Paradigm

Innovation & business models

OER Technology

Fragmentation of the OER Communinty

Lack of interoperability among OER repositories

# Open Educational Resources (OER)

Open Educational Resources (OER) are teaching, learning and research materials in any medium – digital or otherwise – that are in the public domain and/or released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions.  They are free at the point of use and 'free' in the sense that they provide users with greater freedoms in how resources are shared, used, customised and iterated.

Compatible definitions of OER are provided by UNESCO, Hewlett Foundation and OER Commons.

# OER Innovation Routes

- Lower cost routes to delivering online, blended distance learning

- Supporting student readiness through non-formal learning opportunities

- Providing access to education for disadvantaged peoples

- Supporting diversity and inclusion throughout learning and teaching processes

- Removing barriers to collaboration between institutions, individuals, countries

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# Service Vectors for OER Innovation

| | |
|---|---|
| Accreditation/Recognition | Platformisation |
| Authoring & Publication | Proctoring |
| Authentication | Quality Assurance |
| Course creation | Rapid reskilling |
| Curation | Self-directed learning |
| Equality, Diversity & Inclusion (EDI) | Teaching |
| Forecasting & Needs analysis | Training |
| Learning pathways | Translation |
| Lifelong learning | TVET |

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# 1. ENCORE+ OER Innovation Evaluation Framework

Theorising innovation with/through OER

# OER Innovation Evaluation Framework

The framing work on innovation that informs the design of this tool includes Rogers (2003); Carroll, Kellogg & Rosson (1991) and Puentedura (2006).

OER related practices are being conceptualised through the SAMR framework (Puentedura, 2006) and Darwish's (2019) model of edupreneurship. Business strategies are aligned with the 'defenders and prospectors' indicators (Miles & Snow, 1978; Orr et al., 2018).

The ENCORE+ OER business model typology is synthesized from Tlili et al. (2020); Padilla Rodriguez et al., (2018); Belleflamme & Jacqmin (2015); Ubachs & Konings (2016); and Farrow (2019).

The stakeholder value proposition and impact matrices combine categories from Rogers (2003) and the Cabinet Office 'UPIG' or 'CPIG' stakeholder model (no citation).

# OER Innovation Evaluation Framework

## Basic Information

You can begin the process of completing the framework by recording basic information about your case, including the size and scale of your operation, your user base, and key challenges faced.

| | | |
|---|---|---|
| **Case Name:** | | **What is your offer?** |
| **Organisation:** | | |
| **URL:** | | **Key Challenges:** |
| **User base (size):** | | 1. |
| | | 2. |
| | | 3. |
| **Scale of operation:** | (Micro/Meso/Macro/International) | |

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# Strategic Focus

This prompt invites reflection on a series of binaries which can be thought to define a strategic approach. Thinking about each of the categories can facilitate understanding of how and where the approach is innovative and different (as opposed to more traditional). This is not to imply that more 'innovative' approaches are always preferable since a highly targeted approach in one or two areas might be more successful.

| Products & Services | Target Group(s) | Advantage of approach |
|---|---|---|
| Core provision **or** Complementary / Alternative | Traditional **or** Non-traditional | Traditional competence **or** Emergent, innovative approaches |
| **Sustainability & Revenue** | **Network** | **Communication Channels** |
| Efficiencies, cost-cutting **or** new revenue processes | Traditional, institutional **or** non-traditional, dynamic | Traditional **or** new/virtual channels |
| **Value Added** | | |
| Legacy/traditional knowledge **or** New, innovative approaches | | |

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# Business Model(s) & Sustainability

A range of business models have been proposed for OER. The ENCORE+ project has rationalised these into 14 types organised into 4 categories below. In practice models are often combined, but it can be helpful to think about how efforts can be focused.

| Category | Business Model | Description |
|---|---|---|
| Externally funded | Donations Model | Funding from donations or grants, e.g., foundations, society, industry, non-governmental agencies |
| | Governmental Model | National and international governmental agencies providing funding for OER |
| | Sponsorship / Advertising Model | Generating revenue by exposing learners to commercial messages |
| Internally funded | Institutional Model | Higher education providers setting aside some part of their budget for OER programmes |
| | Substitutions Model | Cost savings from redundant services (e.g. obsolete systems) are redirected towards OER programmes |
| | Author pays Model | Publishers generate revenue by charging content creators |
| Community funded | Community based | Members of a community or network collaboratively create and use OER, generating revenue through services and/or infrastructure |
| | Membership Model | The Membership model relies on organizations contributing to the OER provider with money, services and/or goods |
| | Platformization | Organises stakeholders around a digital ecosystem, facilitating interaction and generating insights |
| Higher Education Service Models | Data Exploitation Model | Generates revenue by selling analytic data about the activities of those using a learning environment |
| | Dual-Mode University | Use of OER in an online course (e.g. Massive Open Online Course) to develop a distance learning or virtual university operation |
| | Freemium | Educational materials are offered for free and sustainability is derived from subsequent income streams offered alongside this (e.g. assessment or access to a larger curriculum) |
| | Online Programme | Extending presence-based education to online or blended courses |
| | Segmentation Model | Commercializing a service relating to OER (such as printing open textbooks; providing assessment or certification of learning) |

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# Pedagogy & Technology

A range of different ways to organise teaching and learning using OER have been proposed. This section encourages reflection on the specific ways you're approaching or understanding this.  What difference is OER making to your practice?

| Pedagogy | Technologies |
|---|---|
| What kind of pedagogy (theory of learning) informs your practice relating to OER? | How are you using technologies to innovate or enhance the offer to your stakeholders? |

# OER Implementation

OER use can involve simple substitution of course materials or to support more transformatory approaches.   The SAMR framework (Puentedura, 2006) is used here to provide a conceptual framing for this spectrum.

| Substitution | Augmentation | Modification | Redefinition |
|---|---|---|---|
| OER substituted for proprietary content with no functional change | Substitution of OER for proprietary content with functional change or task redesign | OER use allowed for significant redesign of tasks or functions associated with teaching/learning | Using OER allowed for new ways of conceiving teaching and/or learning |

# Stakeholders

We've suggested the UPIG model for its flexibility but you could use an alternative. In the table below we present different OER stakeholder as recorded during the ENCORE+ project. (Your own specific configuration could involve others.)

| Users | Providers | Influencers | Governance |
|---|---|---|---|
| Educators | Collaborators | Charities / NGOs | Copyright/Data Officers |
| Instructional Designers / Technologists | Course providers | External actors | Educational authorities |
| Learners (formal/informal) | Ed Tech companies | Funders / Philanthropy | HEI leaders, decision makers |
| Trainers | Infrastructure providers | Media | Institutional actors |
| Workers | Libraries / Collections / Repositories | Leaders | Management |
| | Publishers (commercial/OER) | Lobbyists | Ministries |
| | Service providers | Parents | Policymakers |
| | Support staff | Policymakers | Quality assurance agencies |

# Value Proposition & Impact

How would you describe the value proposition you make to different stakeholders regarding the use of OER? What has been the impact of your work on your stakeholders so far?

| | Value Proposition | Impact |
|---|---|---|
| USERS | | |
| PROVIDERS | | |
| INFLUENCERS | | |
| GOVERNANCE | | |

# Diffusion of Innovations

Innovations spread because people understand the difference they can make. The following grid (based on Rogers, 2003) encourages reflection on specific innovation vectors. Which factors are relevant to the uptake of OER and innovative approaches for your stakeholders?  (You can use the UPIG model here or substitute your own.)

|  | Relative advantage | Compatibility with existing practice | Simplicity of use | Trialability | Observability of results |
|---|---|---|---|---|---|
| USERS |  |  |  |  |  |
| PROVIDERS |  |  |  |  |  |
| INFLUENCERS |  |  |  |  |  |
| GOVERNANCE |  |  |  |  |  |

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# Barriers and Enablers

It can be helpful to think about factors which facilitate or impede your OER activity, supporting or preventing you from realising your goals and innovating in the desired direction. Here a range of generic types are presented (your own context may involve other factors).

Categories:
- Practitioner level
- Organizational
- Evidence base
- Technology and infrastructure
- Community
- Other

# Concluding Reflections

Having completed the above sections, you are encouraged to reflect on your innovation trajectory as a whole. Not every aspect of activity needs to be radical and transformational, but cultivating an innovation 'mindset' can highlight opportunities and strategies for the future.

Think about your key challenges, your business model, your use of OER, how technology supports this, what kinds of barriers and enablers might have relevance, and what actions could be taken to support innovation with (or through) OER in your context.

# About the data

- Collection by survey between September 2022 and February 2023

- 57 responses

- 49 usable records in the data set

- Wide geographical spread includes Argentina, Canada, Germany, Greece, Hungary, India, Kenya, Myanmar, Netherlands, Norway, Spain, UK, USA

- User base ranged from a few dozen up to 10,000,000+ monthly users

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# Forthcoming Publications

## ENCORE+ OER Innovation Framework

Comprising the full framework with theoretical background, CC BY tools for collecting and analysing data, and more than 40 examples of the completed framework.

## OER: Drivers, Enablers, Barriers and Challenges

Desk research report summarising empirical evidence (n=251) around factors influencing OER innovation; providing a model to conceptualise OER innovation

## ENCORE+ OER Innovation Showcase

Highlighting flagship examples through a curated showcase

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# Become part of ENCORE+

- Come to our Network Events

- Invite 5 personal contacts to join

- Subscribe to project channels (LinkedIn, newsletter, blog) https://encoreproject.eu/news
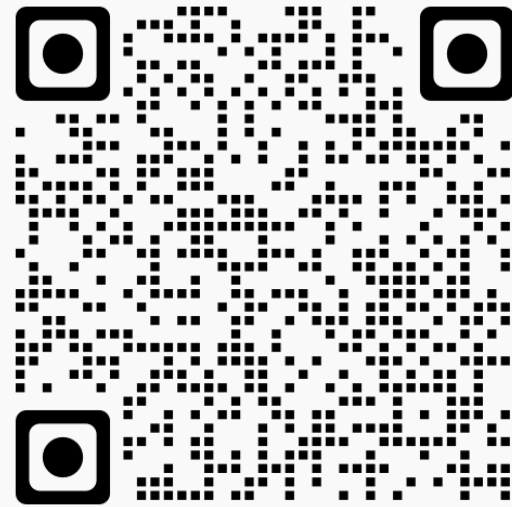
**Join the network on LinkedIn!**

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# Looking ahead:



**21 MAR**

ENCORE+ Network Event on Technology

🕐 21-03-2023 @ 14:30 - 21-03-2023 @ 16:00

📍 Online Event

**29 MAR**

Organisational Integration of OER: Good Practice from H...

🕐 29-03-2023 @ 11:00 - 29-03-2023 @ 12:30

📍 Online Event

**13 MAR**

Quality by means of Transparency: The ENCORE...

🕐 13-03-2023 @ 10:30 - 13-03-2023 @ 12:00

📍 Online Event

https://encoreproject.eu/events/

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## European Network for Catalysing Open Resources in Education

**Website**

For further and updated information about this project please see:

**www.encoreproject.eu**

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