

OERu 2018 mid-year report

Summary of operational progress, including feedback on the “soft launch” of the OERu 1st year of study.



Introduction

Based on the OERu Strategic Plan 2015 - 2017, this report provides a summary of achievements, with a particular focus on the “soft launch” of the OERu 1st year of study drawing on data from the recent offering of the [Learning in a Digital Age](#) course.

The OER Foundation (OERF) is initiating the process of managing open consultation on the OERu strategic plan for the next few years, and this report highlights key challenges and lessons learned to inform the next planning cycle.

Overview of OERF initiatives

The OERF coordinates two related initiatives:

1. **OER universitas** (OERu) - An international network of innovative higher education institutions inspired by the vision of opening access to a credible, high-quality, and affordable education to learners around the world. Through OERu, learners have the opportunity to develop knowledge and earn credits towards globally recognized qualifications at partner institutions.
2. **WikiEducator** – a community of educators, comprising 80,000 registered account holders, who collaborate on open education projects. WikiEducator is the primary authoring environment used for collaborative planning and development of the OERu open online courses.

OERu - A unique international open education innovation partnership

The OERu collaboration is unique in a number of respects.

- OERu publishes fully online, credit bearing courses based entirely on OER.
- OERu courses are underpinned by a transnational credit transfer model with pathways to achieving university-level exit qualifications. Learners study for free and pay a nominal fee for assessment services.
- OERu courses are open in every respect. They do not require a learner to register or log in to gain access to the learning materials. Participants are also able to follow interactions between learners that are published on our open systems. This approach provides opportunities for potentially disadvantaged groups to succeed anonymously. For example, first in family indigenous learners may undertake a trial of university-level education without incurring any cost, risking public failure, or sacrificing personal identifiable data. Moreover, the OERF’s commitment to free and

open source software ensures that all learners can participate in every course without the need to purchase proprietary software licenses.

- OERu has pioneered and implemented an open source, component based [Next Generation Digital Learning Environment](#) (NGDLE). The OERu delivery model is designed for learning on the Internet, rather than learning via a single application such as a Learning Management System. Learners retain control over all their contributions and will have access to the outputs of their creative works long after the courses are completed. As an open source ecosystem, the OERu delivery platform can be replicated by any institution in the world. The OERF shares [technical recipes](#) and associated source code for all components of our systems. There is no component in the OERu delivery platform that requires proprietary systems, so it can therefore be replicated in any country in the world.
- OERu courses promote a *pedagogy of discovery* where learners are encouraged and supported to discover open access resources in pursuit of their *own learning interests* to achieve personalised course outcomes. This free range learning approach will likely foster greater confidence, and therefore deeper learning in higher education. The OERu's [Learning in a Digital Age](#) course is designed to build learner competence in the pedagogy of discovery with learners having the option to attain micro-credentials that can be recognised for formal academic credit. This course can easily be adopted by OERu partners to serve local learners.
- The OERu is a designated project of the UNESCO OER Chair Network. The OERF has strong connections with intergovernmental agencies and includes the Commonwealth of Learning as a contributing member.

As a small, low-cost, non-profit organization, the OERF has made steady progress with the implementation of the OERu on a global scale as summarised in the following table:

Metric	Baseline (2015)	End of 3 year planning cycle (2018)
OERu online courses published	10 micro-courses equating to 400 notional learning hours.	55 micro-courses equating to 2,200 notional learning hours for formal academic credit.
Approved qualifications	None	<ol style="list-style-type: none"> 1. Certificate of Higher Education Business, University of the Highlands and Islands, UK 2. Certificate of General Studies, Thompson Rivers University, Canada 3. First Year Foundations Certificate, Thomas Edison State University, USA.
International credit transfer agreement	None	Approved credit transfer agreement operating across four countries (Canada, New Zealand, United Kingdom and United States). South Africa in progress.
Technology delivery platform	Wiki-based delivery platform	Open source, component-based Next Generation Digital Learning Environment (NGDLE) implemented.

Stackable micro-credentials	None	16
Registered OERu learners	Nil	703 (60 countries)
Estimated savings in tuition and textbook costs for currently registered OERu learners	Nil	US\$380,323
Learner support	None	<ul style="list-style-type: none"> • Dedicated learner support site published • Automated orientation email campaign for new OERu learners implemented • Automated course announcements for cohort-based and independent study segments established.
Marketing collateral	None	<ul style="list-style-type: none"> • Student video • Partner's video • Student Rackcard • Course poster templates • Implemented self-hosted marketing automation system (Mautic)
OERu business model	None	<ul style="list-style-type: none"> • Published (see Brochure and Canvas) (Currently 60% of operational costs covered by membership fees. Balance through Hewlett support grant)
Full-time OERu staff	2	2

OERF Governance

During the reporting period, the OERF appointed two new members to the Board of Directors:

- Professor Sandra Wills, Pro Vice-Chancellor, Learning and Teaching, Charles Sturt University, Australia
- Mary Burgess, Executive Director, BCcampus, Canada.

These appointments widen our depth of experience in the contemporary provision of open education in an international context.

OERu international meetings

A key strength of the OERu partnership is the rigour of our open planning approaches which build trust among partner institutions to implement a low cost, low risk, but high impact OER innovation model.



OERu 17-10 International partner's meeting

The OERF convenes an annual international meeting for partners and the Council of Chief Executive Officers meeting¹. Consistent with our open philosophy, the meetings are publicly streamed live on the Internet with opportunities for remote participants to contribute to our planning. The meeting agendas are developed through open consultation and the reports and recordings of the meetings are published openly in WikiEducator. The [OERu timeline](#) provides a succinct summary of our history.

During the period of review, the OERF convened six international meetings:

Meeting	Year	Country	Links
4th Meeting of OERu partners	2015	South Africa	• Agenda and report
3rd Meeting of OERu Council of CEOs	2015	South Africa	• Agenda and report
5th Meeting of OERu partners	2016	United Kingdom	• Agenda and report
4th Meeting of OERu Council of CEOs	2016	United Kingdom	• Agenda and report
6th Meeting of OERu partners	2017	Canada	• Agenda and report
5th Meeting of OERu Council of CEOs	2017	Canada	• Agenda and report

The [2018 OERu meetings](#) will be hosted by Charles Sturt University in Port Macquarie, Australia and are scheduled for 7 - 9 November 2018.

Launch of the OERu 1st year of study

Consistent with the OERu Council of Chief Executive Officers' decision to proceed with a "soft-launch" of the OERu 1st year of study, the OERF launched the first offering of [Learning in a Digital Age](#) comprising four micro-courses in March 2018. The soft-launch approach is designed to pursue realistic but conservative targets to validate the technology delivery platform, and to collect data to inform decision-making for scaling-up delivery as the OERu builds brand awareness.

¹ International travel and accommodation of OERu partner representatives are not funded by the OERF. Local venue and catering costs are donated by the hosting OERu partner institution.

Inaugural offering of Learning in a Digital Age

The Learning in a Digital Age pilot attracted 703 registered (and 659 unregistered) participants from 60 different countries. The Saylor Academy, one of the OERu partners, [adopted a copy](#) of the Learning in a Digital Age course for their own platform, thereby providing a proof of concept for deploying a decentralised OER technology ecosystem with the capacity for distributed, institutional-based learner groups to interact with each other. Assessment options are currently available in the United States and New Zealand with credit transfer recognised towards the Certificate Higher Education Business (OERu) in the United Kingdom.

To minimise the risks of oversubscribing the course before testing the technology platform in an authentic delivery context, marketing of the course was restricted to mentions via personal Twitter accounts of OERF staff and a site-wide notice on the WikiEducator website.

Of the 703 registered participants from 60 different countries, the top thirteen countries according to the number of registrations were: India, United States, Canada, Fiji, Nigeria, New Zealand, Papua New Guinea, South Africa, Uganda, Australia, Egypt and Kenya. Site analytics recorded 1,362 users visiting the course websites during the active cohort period, indicating that 48% of visitors chose not to register for course announcements. The course sites generated 19,839 page views with 9,083 being unique for the active cohort periods.

The component based technology platform performed well with learners using the full range of interaction technologies. It became evident that learners were experiencing difficulty in specifying the blog feed urls used for aggregating posts from their learning portfolios. The OERF therefore developed a blog feed finder service plugin for Wordpress, which will be integrated into future OERu course offerings (and, as open source software, is already being adopted by other OER groups). The OERF is now confident that we can move forward and scale-up for larger numbers of learners by progressing with a phased launch of the business courses for the Certificate of Higher Education Business (OERu).

Who are the OERu learners?

An optional *New OERu Participant Survey* was administered. While the sample is still too small (N=59) to generalise findings for the OERu, the following data provide some insight into the characteristics of the learners who participated in the inaugural cohort. Learners ranged from 25 to 60 years of age, with one in five respondents falling in the 46 - 52 age group. Half of the learners indicated English as their primary language. Respondents who chose to identify their gender identity, demonstrated that 64% were female. The majority of respondents (66%) were in full-time paid employment. Professional development (50%), followed by reskilling for a new career (17%), and personal development (17%) were cited as the main motivations for taking an OERu course.

Approximately one in three respondents confirmed that they were planning to acquire a micro-credential, and an equal number indicated that they were thinking about completing a

micro-credential. Clearly, the micro-credential model is of interest to the individuals who completed the survey, with only 12% confirming that they were not interested in pursuing microcredentials.

Estimating potential savings for learners studying with OERu

The primary aim of the OERu is to widen access to more affordable higher education for learners who cannot afford traditional education. With the launch of the OERu 1st year of study, it is now possible to estimate potential savings for learners.

Drawing on tuition data from the from the Department of Education in the US, StudentLoanHero.com estimate the average cost per credit hour for colleges across every sector (including private and public, for-profit and not-for-profit, and two- and four-year colleges) to be \$594.46. Depending on sources², the cost of textbooks per credit hour range from \$20 to \$40. (That is, the annual cost of textbooks divided by the number of credits (30) for a full year of study.) For the purposes of this report, we estimate the average cost of tuition plus proprietary textbooks to be \$624 per credit hour in the US (\$594 plus average textbook cost per credit hour of \$30).

In the OERu model, learners do not pay for tuition or textbooks to participate in fully online courses. The cost to the learner is restricted to the assessment fees and associated administrative charges for transcript credit to facilitate credit transfer. Based on confirmed prices for assessment fees, credit transfer, and associated administration fees the cost per credit hour for the Certificate Higher Education Business (OERu) is \$83.

The average cost for a full year of study, excluding travel, accommodation, and living costs in the US is estimated to be \$18,720, compared to \$2,490 per year for the OERu model. Therefore, the philanthropic return on investment in the OERu model is potentially **17 times greater** than projects like Zero Textbook cost initiatives.

Challenges and lessons learned

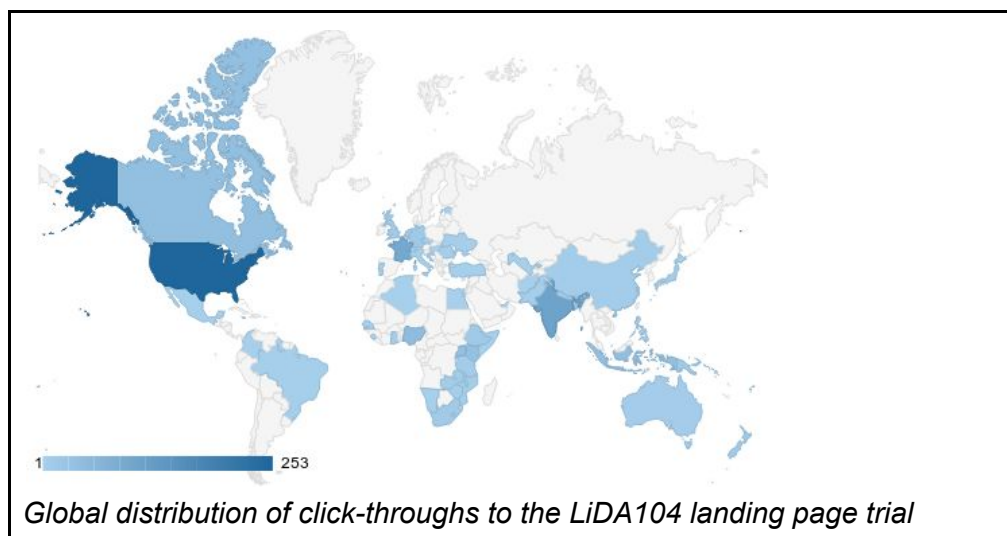
While the OERu is facing new challenges as the network implements the 1st year of study and prepares to scale up operations, valuable experience has been gained to inform decision-making for this important next phase of the project.

1. *Transnational credit transfer is complex but the OERu now has a functioning demonstrator model.* The OERF underestimated the complexity, related interdependencies, and time required to assemble a coherent OER programme of study that would lead to achieving credit-bearing university qualifications, that were underpinned by institutionally approved and signed articulation agreements for international credit transfer. This was a critical path dependency because OERu could not launch its courses until signed articulation agreements were in place to

² CBS News report students spending in excess of \$1200 per year on textbooks. The Huffington Post reporting on data from the National Association of College Stores (NACS) indicate that students spend on average \$655 per year on textbooks.

guarantee formal credit for learners achieving OERu designated qualifications. We have now achieved an approved demonstrator model for transnational credit transfer, which other institutions in the network can now emulate.

2. *OERu has demonstrated that it will be able to deliver a full year of study for \$2490, but in the absence of an affordable and effective marketing strategy, growth will be constrained.* Based entirely on open source software infrastructure, the OERu innovation partnership has built a functioning OER prototype of a transnational, philanthropic ecosystem enabling learners to gain recognised university-level qualifications for just 13% of the comparable average cost of tuition in the US.
3. *The next challenge is to develop an effective but affordable marketing approach to communicate the availability of these pathways, particularly to under-served learner populations.* As a small open source, non-profit organisation, the OERF is not well versed in proprietary marketing strategies, nor do we have the fiscal resources for elaborate corporate-like marketing campaigns. We do, however, have a number of options to pilot marketing solutions:
 - *Leverage the international footprint and organic traffic of the WikiEducator site and connect site-wide course announcements with Mautic landing pages and automated email campaigns.* We implemented a prototype with the fourth micro-course for the *Learning in a Digital Age* course to monitor the web traffic sources comparing Twitter announcements of the *Critical Media Literacies* (LiDA104) micro-course to a WikiEducator site announcement linked to a [dedicated landing page](#) in Mautic for learners to register their interest in participating. Of the 957 recorded “click throughs” to the Mautic landing page, 84% originated from WikiEducator compared with 9% from Twitter and its associated “retweets”. Analytics indicate that 12% of individuals who visited the Mautic landing page registered to participate in the micro-course. During the period of the current reporting period, the WikiEducator site generated 15.4 million unique visits, averaging 0.5 million visits per month. Given the wide international footprint of WikiEducator and its relatively high Google page rankings of 6.2 (compared with the OERu.org site of 4.0) the Wikieducator site will be used to publish site-wide announcements linked to dedicated Mautic landing pages.



- The OERF team has gained valuable experience in using Mautic email campaigns for administering course announcements. This experience can now be integrated into OERu marketing initiatives.
 - As a non-profit organisation, the OERF qualifies for [Google AdWord grants](#) to the value of \$10,000 per month, but we do not have in-house expertise in this form of e-marketing. We need active participation and support from the partner network in designing and implementing these campaigns.
 - Another possible strategy would be to target a small number of countries in the developing world with high OERu registrations (for example: India, Nigeria, Papua New Guinea and South Africa) to trial alternative communication strategies in an effort to determine effective marketing campaigns appropriate to these contexts.
4. *Scalability demands upfront time investment in establishing automated communication solutions to administer a large number of course offerings.* The OERu is planning to implement a “*perpetual academic year*” based on three cohort offerings of each micro-course plus an independent study segment each year. This will enable learners to join offerings suited to their own schedules and commitments. When fully implemented, the perpetual academic year will equate to 220 course offerings per year. Such volume requires us to set up automated solutions to administer cohort initiation and corresponding course announcements, so that the OERu can scale up the number of courses without the need for corresponding increases in full-time staff. While the set up time required for these automated campaigns reduces the rate at which new courses can be launched in the short term, in the medium term it will enable the OERF to manage the administration of the anticipated number of courses with current staffing levels. Ways to streamline the process of creating automated course communications will also be investigated.
5. *Building a leadership role in transnational micro-credentialling for OER.* The OERu has assembled full courses as sets of micro-courses to mitigate credit transfer challenges associated with the differences in standard course size in different parts of the world. This has created the opportunity to establish micro-credentials for OERu micro-courses. We have partnered with Edubits at Otago Polytechnic and there are a growing number of [OERu micro-credentials](#) listed on the site. To the best of our knowledge, the OERu is the only international OER collaboration that currently offers stackable micro-credentials that are mapped to formal academic credit. Given that professional development and reskilling for new careers were cited as the main motivations for registering for the OERu soft launch, we anticipate healthy growth in micro-credentialling.

Looking forward

The OERF is now in the process of initiating open consultation on the strategic plan for the next three years. Based on our current course registration targets, it is estimated that the OERu model could collectively save learners in excess of \$8 million dollars in average tuition and textbook related costs over the next strategic planning cycle.

Year	Targets	Estimated collective annual savings for learners ³
2018	2,500 course registrations 23 micro-courses launched	\$1,343,500
2019	5,000 course registrations 40 micro-courses launched	\$2,705,000
2020	8,000 course registrations 55 micro-courses launched	\$4,328,000
Total cumulative savings		\$8,376,500

These projections illustrate the considerable leverage potential of the OERu model not only to widen access, but also to generate substantive savings for learners that could ultimately underpin a more sustainable business model for higher education.

Participation in OERu planning

Staff from partner institutions can participate in OERu planning by:

- Joining one of our working groups
- Contributing to the strategic planning consultation
- Participating in OERu course and technology innovation pilots.

Staff can register their interest by completing the [online registration form](#).

³ OER related savings in tuition cost and no-textbook costs for OERu course registrations of \$541 per credit hour derived from the average cost of tuition in the US (including private and public, for-profit and not-for-profit, and two- and four-year colleges) estimated by [StudentLoanHero.com](#) at \$594.46 per credit hour.