

Toward a Sustainable OER Ecosystem: The Case for OER Stewardship

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Introduction

The creation, curation, and widespread use of open educational resources (OER) is making a significant difference in democratizing access to a high-quality education. From a burgeoning movement launched over 15 years ago, to a growing field, to national and global impact, teachers and learners in increasing numbers are participating in and benefiting from a process driven by the collaborative development and sharing of educational materials that are freely available for anyone to use, unrestricted by traditional copyright.

From K-12 districts, to academic libraries, to ministries of education, to consortia of community colleges and universities, what started as a small group of loosely coupled academic institutions, organizations, and education-facing foundations has catapulted to the front pages of education journals and the mainstream press. Aligned to issues such as college affordability, equal access to education, personalized learning, and the professionalism of teaching, it is clear that the field of OER is not only here to stay, but is central to global efforts to improve education outcomes for all students.

Rooted in analogous “open” efforts, including open source software and open access journals, the field

of OER has come to be recognized as one that can inject innovation into long-standing institutional practices, such as procurement and curriculum decision-making, but also into business models that can better serve the interests of both students and educators.

However, similar to the debates in open source software over the past three decades, the mechanisms for how individuals, organizations, and institutions should be able to use and reuse OER have become more complex. In some cases, OER creators have expressed concerns about the perceived use of their contributions. In other cases, the restricted rights of users to access and use learning objects, especially in digital platforms and in a commercial context, add to uncertainty around OER adoption.

If the field of OER is to continue on its trajectory from a nascent movement to the mainstream of education, it is incumbent on OER advocates and stakeholders—including educators, librarians, instructional technologists, and content developers—to address how we might sustainably scale the movement over time and across diverse contexts, while still staying true to the values of openness that attracted so many to OER in the first place.

It is for that reason, we developed and are pleased to introduce the CARE Framework. Its purpose is to both support and make more explicit the valuable work that is being done and needs to be done in building a sustainable open education ecosystem.

The CARE Framework

The purpose of the CARE Framework is to articulate a set of shared values and a collective vision for the future of education and learning enabled by the widespread adoption and use of OER. It aims to address the question of how an individual, institution, or organization seeking to be a good steward can contribute to the growth and sustainability of

the OER movement consistent with the community's values.

While OER typically reside in the public domain or have an alternative license that specifies how a resource may be reused, adapted, and shared, the use of an open license is in itself insufficient to addressing broader sustainability and ethical questions. Indeed, the predominant business models of the educational technology and publishing industries have been predicated on the concept of access limitations and scarcity. As such, the time is past due for the OER community to be more explicit and intentional about the ways in which OER are produced, packaged, and delivered.

At the center of the CARE Framework (see figure below) are a wide variety of stakeholders—OER creators and users, working as individuals and as part of organizations, in traditional and non-traditional educational settings—seeking to act as good stewards of the values of a sustainable OER movement. Locating people at the center of the CARE Framework serves to remind us first and foremost of the broader social context and purpose of the OER movement.

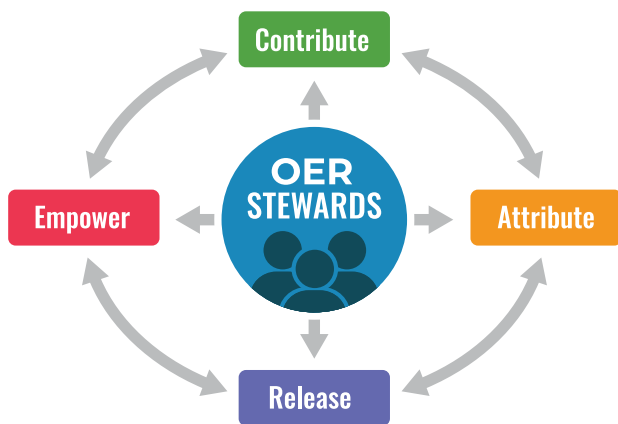


Figure 1: The CARE Framework for OER Stewardship

People serving as OER stewards pursue a wide variety of strategies and tactics relevant to their specific context to improve access to education and opportunity over time. Yet, what all good OER stewards should have in common is a commitment to practices that serve to demonstrate their duty of care to the broader OER movement:

- **Contribute:** OER stewards actively contribute to efforts, whether financially or via in-kind contributions, to advance the awareness, improvement, and distribution of OER; and
- **Attribute:** OER stewards practice conspicuous attribution, ensuring that all who create or remix OER are properly and clearly credited for their contributions; and
- **Release:** OER stewards ensure OER can be released and used beyond the course and platform in which it was created or delivered; and
- **Empower:** OER stewards are inclusive and strive to meet the diverse needs of all learners, including by supporting the participation of new and non-traditional voices in OER creation and adoption.

It is our belief that if the four practices that comprise the CARE Framework—*Contribute, Attribute, Release, and Empower*—are widely adopted, the ecosystem of OER stakeholders will diversify, the use and adoption of OER will grow, and the future of education and learning will benefit via greater access, equity, affordability, and relevance.

CONTRIBUTE

OER stewards actively contribute to efforts, whether financially or via in-kind contributions, to advance the awareness, improvement, and distribution of OER.

The OER movement is a growing community of individuals working across institutions and organizations all around the world, collaborating to improve educational access and outcomes for all learners.

In any community, fostering the need or desire of people to contribute to its success is of paramount importance. It is not enough for individuals to simply take, but also to give back, if the goal is to create a sustainable and thriving community. The OER community is no different. It behooves good OER stewards to be intentional about the ways in which their actions support the health and well-being of the broader OER movement itself.

With respect to the OER community, we define 'contribute' to mean several specific activities and means of support. First, financial and in-kind contributions are necessary to support efforts that raise awareness of the benefits and affordances of OER, in policy and in the classroom. Second, the development, maintenance, continued improvement, and customization of OER is a vital service that OER community members can provide. And, third, contributions and support are needed to help further the distribution and dissemination of OER for students who have historically lacked such access, including support for multiple languages, accessible formats, and for low bandwidth use. Today, while many benefit from the past contributions of members of the OER community, the sustainability of the movement itself is directly related to the future health and vibrancy of new community contributions.

ATTRIBUTE

OER stewards practice conspicuous attribution, ensuring that all who create or remix OER are properly and clearly credited for their contributions.

The invitation for anyone with the means and willingness to contribute to the OER movement via the act of authorship—whether of original works, such as activities, lesson plans or simulations, or revisions to previously published works—is one of the key innovations that differentiates the production of OER from traditional educational publishing. This

democratization of the production and refinement of instructional materials elevates practitioner and student voices and is welcoming of non-traditional subject matter experts willing to share their expertise with others.

Inherent in this approach is the belief that the quality, relevance, and usefulness of materials is derived, at least in part, from the collaborative contributions of the OER community to those materials over time. In this way, contributions of OER authorship are leveraged time and again to the benefit of learners. At the same time, good OER stewards recognize that the provenance of OER materials matters and that the authors of and contributors to all OER materials deserve the community's respect and recognition for their efforts. For this reason, the CARE Framework asserts that we must practice conspicuous attribution to ensure that all who create or remix OER are clearly credited for their contributions.

RELEASE

OER stewards ensure OER can be released and used beyond the course and platform in which it was created or delivered.

The day-to-day experience that educators and students have with OER is often mediated by one or more technological platforms. While there are many considerations in selecting a technological platform to access and manage OER, it is important to note that not all platforms are designed equally well to foster a sustainable and vibrant ecosystem of OER use and remix. For instance, if a platform mixes OER content with all rights reserved materials and obscures their difference to users, many of the most important benefits of OER are lost.

Therefore, good OER stewards, recognizing these issues, seek to design and use technology platforms and systems that facilitate the goals of the OER movement, including by supporting the broadest

possible use and collaborative revision and remix of materials over time. This includes providing tools to allow users to download and share content beyond the course or platform in which it was created or delivered. The evaluation of the features of technological platforms are especially important to OER stewards, given that many students and educators are not able to make individual choices about the platforms they use, as this is most often decided at the institutional level.

EMPOWER

OER stewards are inclusive and strive to meet the diverse needs of all learners, including by supporting the participation of new and non-traditional voices in OER creation and adoption.

Time and again, policy and market forces have failed to incentivize the publishing and technology industries to proactively meet the needs of all learners. What resources get created, how academic topics are covered, from what perspectives, for which learners, and in what formats are all decisions that have been centralized in the hands of commercial publishers. Indeed, the scarcity of affordable, high-quality resources in specific subjects and for select populations has too often been presented as a *fait accompli*. Yet, this is a future that OER stewards reject. The OER movement values and supports both the creation and the remix of resources for diverse and underserved learners, whether they are individuals with disabilities, speak a minority language, or are seeking education in a non-traditional setting.

In the same way, OER stewards elevate the participation of new and non-traditional voices in OER production and remix. By reducing the traditional barriers to creating and sharing resources and with a commitment to conspicuous attribution, the OER movement benefits and is itself enriched from the broad participation of individuals seeking to share their expertise and contributions with others. In

turn, this commitment to new and non-traditional voices will help the OER movement to better serve a more inclusive and diverse set of educators and learners.

Applying the CARE Framework

The values expressed by the CARE Framework support a hopeful vision for the future of OER and education, positively impacting not only issues of access and affordability, but also the seemingly intractable issues of equity and inclusion. Thus the CARE Framework is meant to be applied by all individuals, organizations, and institutions who share a stake in the field's long-term success and sustainability. This includes individuals who create or adapt OER for their own teaching and learning purposes; nonprofit OER publishers and libraries; commercial OER publishers; as well as educational technology vendors looking to incorporate OER into their products or services.

For those new to OER, we hope that the CARE Framework serves to shine a light on a set of norms and practices that serve to encourage, rather than discourage, increased collaboration and sharing of content. And given the existing complexities of content ownership, licenses, and technology platforms, our goal is to provide insights into the mission-driven context of this work. In particular, it is our hope that through application of the CARE Framework that all educators will feel confident in their exploration and adoption of OER.

In advancing this framework, our goal is be explicit about the values that we think are core to the OER movement, including the practices of individuals and organizations that are involved in the production, dissemination, and use of OER. While it is beyond the scope of this initial paper to enumerate all of the many practices that support good OER stewardship, our intent is to invoke a more nuanced and meaningful discussion about the individual and organizational practice of OER and openness in

education and for learning. We hope that affiliation with the OER community means something to those who participate in it, and it is with that goal in mind that we offer up the CARE Framework.

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