

EDBRIDGE PARTNERS, LLC ON BEHALF OF THE
WILLIAM AND FLORA HEWLETT FOUNDATION

Formative Evaluation of Open Education Networks

Final Report

JULY 2021

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The edBridge logo features a stylized white arch above the text "edBridge" in a bold, white, sans-serif font. The background of the entire page is a red-tinted photograph of two young women smiling and looking at a document together. One woman is wearing a hijab and a leopard-print top, while the other is wearing a light-colored shirt and a patterned bag. The overall aesthetic is professional and educational.

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Executive Summary

The William and Flora Hewlett Foundation engaged edBridge Partners to help evaluate and improve efforts around a critical component of their Open Education Strategy—developing an inclusive field that is responsive to diverse educators and learners. The purpose of the formative evaluation is to help clarify how and how well different networks are serving the needs of different communities, as well as whether and to what extent participation in these networks facilitates adoption and use of open education resources and practices.



77% of networks rated themselves as Good or Excellent in terms of serving their audience/stakeholders.

Network Survey Findings

FORMATIVE EVALUATION GOALS

- Examine how open education networks are engaging a diversity of educators, practitioners, and institutions.
- Provide formative insights about the health of the field.
- Spark thinking about how we can learn and work collectively.
- Inform how the Hewlett Foundation can be more intentional in how we support networks in creating more equitable learning opportunities for students.

FORMATIVE EVALUATION APPROACH

The first phase of this work established a baseline mapping of the open education networks active primarily within the US and Canada, in both K-12 and higher education. edBridge conducted a landscape analysis of both the higher education and K-12 sector open education fields to identify networks, map key players, and determine intersection/overlap between networks and sectors. We examined the key functions, characteristics, and differentiating factors of networks to develop a Networks Framework. We then delved more deeply into those networks that meet the definition of a network based on the framework and have a primary focus on open education.

The second phase of this work involved surveys of leaders of open education networks, HBCUs, and regional OER networks, in-depth interviews with key leaders of open education networks, and a series of Dialogue Days with different stakeholder groups, including Open Education Conference attendees, HBCU OER Leaders, K-12 State and District OER Leaders, to gather information about existing open education networks and the field. The goal of this research was to understand how the leaders in the field feel about the progress of the open education field; to help strengthen existing and emerging networks within the field; and to identify gaps and opportunities for new voices.

In the final phase of the evaluation, edBridge Partners facilitated a two-part Dialogue Day series with the leaders of open education networks. The focus of part one was to share the draft of the findings and gather their input and feedback to inform the final report. The focus of part two was on the strategic plans for the participants' networks and specifically how the networks are contributing to diversity, equity, and inclusion (DEI) in the open education field. The goal of part two was to arrive at a set of shared learning questions with respect to how networks and the field might work collectively to advance DEI. This phase also included the final analysis and formation of recommendations to the Foundation and the field.

NETWORK MAPPING FINDINGS

The network mapping revealed some interesting baseline information about the open education field.

- Sector
 - » The majority of Influencer Networks (66%) serve higher education (30/62) or both higher education and K-12 (11/62).
 - » Those serving K-12 (21/62) are primarily regional/local networks established by states or school districts.
- Membership
 - » 39/62 (63%) of networks have closed membership, meaning there are criteria for members to join. 23/62 (37%) of networks are open, meaning anyone can join.
 - » The closed networks tend to be those that are bounded geographically (i.e. must belong to the district, state, province the network serves).
- Cost:
 - » 55/62 (89%) of networks are free to join.
- Year Founded
 - » 37/62 (60%) of networks were established within the last six years.
 - » The oldest open education networks were established in 2001 (Creative Commons) and 2003 (BCcampus).
- Size
 - » Size of networks vary from as small as 50 members to more than 500 members. In some cases, such as the regional/provincial/state networks, it is hard to determine exact membership size, as all institutions in the region/province/state may be eligible to participate.
- All 15 of the influencer networks with institutional/state/district memberships share members to some degree.
 - » One hypothesis is that the overlap highlights the opportunity for greater collaboration between the networks as they all have overlap to some degree and quite a bit of overlap in some cases.
 - » The K-12 networks are not well connected. There is a lack of national/global networks serving K-12 whether exclusively or together with higher education.

NETWORK SURVEY FINDINGS

edBridge surveyed 25 leaders of open education networks (100% response rate).

- 48% of the leaders surveyed served in current role for between 1-5 years.
- Majority of networks surveyed formed between 2014 and 2020.
- 78% have less than 5 staff dedicated to the operation of the network.
- 40% networks have less than 50 members, another 30% have between 51-149 members.
- When asked to describe which factors are true for their networks, respect, shared values, and shared vision were the factors that topped the list.

- 70% of networks rated their networks' health as Good or Excellent and 78% of network leaders described their network as growing.
- The top 3 activities of the networks include information exchange/collaboration, professional development/training, and advocacy/policy.
- Responses varied on whether network activities specifically advance Diversity, Equity, and Inclusion (DEI): 26 percent felt their activities did a little to advance DEI, 29 percent felt they did a moderate amount, and 33 percent felt they did a great deal.
- The main goals and priorities of the networks include:
 - » Sharing / Collaboration / Developing a community of practice: Ways of working within and across networks to achieve a shared goal, sharing knowledge, and working together to achieve goals or improve performance.
 - » Capacity-building: Building capacity in the field to use of open educational resources and practices, supporting creation and publication of open education resources by academic institutions, providing professional development for OER advocates, and creating sustainable business models for open education.
 - » Advocacy: Addressing the larger issue of the digital learning gap, raising awareness of open education, influencing policies, and showcasing promising practices that support OER implementation and sustainability.
 - » Equity: Providing greater access to knowledge by making high quality educational materials and opportunities more broadly available, focusing on outcomes for students who have been marginalized in school systems.
 - » Research: Measuring outcomes, evaluating the benefits of OER, using data to design and scale promising practices.
- 74% of networks rated themselves as Good or Excellent in terms of achieving their strategic priorities.
- 77% of networks rated themselves as Good or Excellent in terms of serving their audience/stakeholders.

OPEN EDUCATION FIELD FINDINGS

edBridge used survey results, interviews with network leaders, and several dialogue day sessions to gather data on the state of open education as a field.

Several goals were identified for the open education field by the different leaders and stakeholders:

- **Access and Equity:** Improving access to open educational resources, access to learning generally, advancing equity of access to high-quality education.
- **Advocacy:** Developing and advocating for open educational priorities and practices, promoting policies to sustain open educational practices.
- **Scale and Growth:** Furthering the widespread adoption and implementation of OER for teaching and learning, growing the amount of creation, curation, and use of OER.
- **Sustainability:** Developing a common infrastructure to support open education.

While the players in the field may have some common goals there are differences in how those goals are prioritized and acted upon. In some cases, open education was seen as a way to transform education for social justice, and in others, open education was seen only as a tool for increasing affordability and access.

The participants in this study identified gaps in serving four specific sets of stakeholders and audiences:

- Minority-serving institutions
- Underserved student populations: BIPOC and rural student populations, and students with disabilities.
- K-12 practitioners
- K-12 and higher education leaders and upper-level administrators

There was almost unanimous agreement that there are unmet needs in the open education field, specifically around research, awareness/buy-in, advocacy/policy, and resources.

There is uncertainty across the field whether new networks are needed in the field. Some felt that it might be better to consolidate or strengthen existing networks instead of creating new networks while others cited specific stakeholders as needing support networks.

The consensus amongst respondents is that the field is neither diverse enough nor inclusive enough, and for the most part, the community lacks racial diversity in both leadership and membership. Overall, participants stated that diversity, equity, and inclusion are important goals for their network, organization, institution, state, or district. Many leaders reflected that the community needs more authentic voices to be diverse, and that their organizations can do a better job at finding and engaging those who may directly serve marginalized communities that may benefit from OER.

There are several shared challenges facing the field, regardless of location or sector:

- Lack of awareness and understanding: In general, there is a need for greater awareness and understanding of OER in terms of what it is and what it is not, how it is developed, how it can be used, and what the potential impacts are.
- Perception of quality: The lack of awareness and understanding leads to skepticism about the quality of OER. The perception is that free equates to low quality resources.
- Research and data: Research and data are needed to demonstrate the measurable impacts of open education and open pedagogy on learning, and the financial benefits in terms of Return on Investment (ROI). This data is needed to help make the case with decision makers and legislators to support OER policies and actions.
- Lack of culturally-relevant content: Participants stated the need for more culturally-relevant materials for open education both in higher education and K-12. They also stated the need for more authentic and diverse voices to be engaged in all aspects of the open education field.

- **Interoperability:** Systems and technology used for OER must operate together in order to have greater ease and access to information related to open education, and to encourage greater adoption of OER.
- **Tenure and Promotion Policies:** Participants cited the need for OER institutional policies for tenure and promotion, and compensation for faculty time that takes work with OER into account. They believe that this will have a substantial impact on faculty adoption and use of OER and contribute to the sustained success of the open education field.
- **Lack of continuous curriculum:** K-12 participants highlighted the need for sequenced and continuous curriculum development. Too often, K-12 is leveraging OER in a supplemental manner due there not being a comprehensive library of sequenced, standards-aligned curriculum widely available yet. Higher education participants cited a need for more comprehensive whole course content packages that include ancillary materials, such as lecture slides, homework platforms, and assessment/test banks.

RECOMMENDATIONS

The recommendations provided align to the five components of the Strong Field Framework, and the additional sixth component focused on the Vision and Future Direction, to capture the network leaders' outlook going into the future.

Shared Identity

Recommendation 1:

Engage new stakeholders and develop new champions for the field.

Influencer Network leaders have expressed a desire to be more proactive and inclusive in reaching out to engage new groups in the field. It is recommended that leaders of these developed existing networks make intentional, planned efforts to reach out regularly to new or less connected networks to make certain that they feel welcome and valued as part of the field.

Recommendation 2:

Create greater connections between K-12 and higher education open education networks to reinforce collaboration and common goals for the field.

It is recommended that the higher education-serving and K-12-serving networks in the field work more closely together to strengthen connections between networks serving the two sectors to in turn strengthen the field. Closer collaboration between K-12 and higher education open education networks will help both sectors find common ground and work together with a sense of shared purpose to achieve the broad goals and vision for open education.

Recommendation 3:

Amplify diverse voices, empower others to create and share their work and to engage in decision making.

To create a strong affiliation with the field, network leaders felt it was their responsibility to empower others to create and share their work and to bring

new voices and members into the decision-making in their networks and the field. It is recommended that network leaders proactively seek new membership and new voices for their networks, promote the work of these new members, and ensure that their decision-making bodies represent the diversity of membership in both their network and the field at large.

Standards of Practice

Recommendation 4:

Create More Faculty-Centric Professional Development and Administrator Awareness.

At the higher education level it is recommended that more faculty-centric professional development be developed to help faculty understand open education and support their development and open licensing of courses and content for open education.

Recommendation 5:

Integrate Open Educational Practices into Teacher Education Programs and Pre-Service Training .

It is recommended that curricula for open educational practices be created and integrated as required courses into the teacher preparation programs of colleges of education and teacher pre-service training. This would help ensure that new teachers enter the education field with a strong foundation and working understanding of open education as well as a comfort in creating, adopting, and using open education resources early in their practice.

Recommendation 6:

Provide More Professional Development for Network Leaders.

Professional development for field leaders in management and organizational leadership is critical to expand their capabilities, enhance their careers, and, importantly, develop their staff, members, and network to elevate the field. It is recommended that the following suite of professional development opportunities be offered and supported, through stipends or funding, to open education network leaders: Training on nonprofit governance and fundraising, change management, and assistance in strategic planning. It is recommended that technical assistance be offered to all network grantees that need and want support in their strategic planning.

Recommendation 7:

Continue to Build Interoperability and Infrastructure for OER.

For many network leaders, interoperability of platforms to author, publish, share, and teach with OER continues to be a major goal. The inability for systems and platforms to work together continues to be a major barrier for both K-12 and higher education stakeholders. It should be noted that this is a complex, major issue across education and is not exclusive to open education. It is recommended to establish an open education taskforce for K-12 and higher education that can help move interoperability forward and keep the field abreast of progress in this area.

Knowledge Base

Recommendation 8:

Continue to Fund Research into the Impact of Open Educational Resources and Practices on Student Learning

Having data around the impacts of OER on learning outcomes for students was cited by the network leaders as key data points to leverage in messaging and communications efforts to help support policy change at the district, state, national and institutional level. It is recommended that funding for research that can provide the data that is needed to help influence policy be ongoing and sustained as a focus for funding or collaboration efforts.

Recommendation 9:

Provide Support for States, Systems, Institutions, and School Districts to Calculate Return on Investment for Open Education

Return on investment (ROI) analyses would help open education stakeholders demonstrate the value of open education-beyond just cost savings- to decision-makers and funders in a format and language they understand and value. It is recommended that the Hewlett Foundation consider supporting ROI generation through technical assistance, putting together a small cadre of experienced professionals or a series of workshops to provide this service to grantees, using a consistent methodology.

Recommendation 10:

Continue to Develop a Communications Strategy to Spread Awareness of Open Educational Resources and Practices

In every aspect of the evaluation and across network leaders, improved communication, and greater awareness of OER among stakeholders and decision-makers were cited as areas of improvement. It is recommended that networks be encouraged to continue to work with an external communications firm, engaged by the Hewlett Foundation, as needed, to develop professional communication campaigns and materials that are stakeholder specific and can be disseminated to reach stakeholders most efficiently.

Recommendation 11:

Develop More Student-Facing Communications Materials

The benefits of open education for students should continue to be emphasized and highlighted and the evaluation found that many network leaders believe that communication for open education should be more student-centric. It is recommended that networks work with an external communications firm, engaged by the Hewlett Foundation, to develop student-facing materials and messages that can be incorporated into materials that could be used by higher education institutions and their departments.

Leadership and Grassroots Support

Recommendation 12:

Engage in Exploration and Conversation around DEI, Social Justice, and Racial Equity for the Open Education Field

The consensus from the evaluation is that the field is neither diverse enough nor inclusive enough, and for the most part, the community lacks racial diversity in both leadership and membership. The Hewlett Foundation's

new Open Education Strategy calls for developing an inclusive field that is responsive to educators and learners. It is recommended that Hewlett sponsor a series of forums, dialogues and learning conversations to provide safe environments that support network leaders' individual reflection and shared learning about racial equity and social justice.

Recommendation 13:

Leverage Influencers to Bring More Participants into the Field.

It is recommended that open education networks continue to cultivate and leverage partnerships with associations and organizations that are trusted by stakeholders and decision makers to expand and accelerate creation and adoption of OER. Partnerships can create allies and establish credibility for open education. Potential partnerships could include BIPOC communities and organizations that support them, Minority-serving institutions, Rural schools/associations/ consortia, K-12 Curriculum Directors, and Disciplinary and Educational Trade Associations.

Funding and Supporting Policy

Recommendation 14:

Expand Outreach to Funders with Complementary Mission

It is recommended that networks compile lists of foundations or organizations that fund projects that include aspects of OER.

Recommendation 15:

Seek Opportunities for Collaboration

It is recommended that network leaders purposefully and routinely collaborate on initiatives and funding proposals and share or discuss strategic plans to find common areas and opportunities to join forces.

Recommendation 16:

Continue to Advocate for Changes to Institutional, State, and Federal Policy

At the state and federal level, it is recommended that more active partnerships be established between open education networks and policy organizations to unify the field's policy advocacy and lobby for the field's interests with state and national legislators and policymakers.

Recommendation 17:

Include Open Education Activities for Consideration in Tenure and Promotion Decisions

Specific to higher education, respondents frequently cited the need for open education activities to be integrated into faculty tenure and promotion policies, ideally enabling substantial and immediate impact on faculty adoption and use of OER. It is recommended that organizations and institutions explore options for how this might start to happen.

Vision and Future Direction

Recommendation 18:

Create a Joint 10-year Strategy for the Open Education Field

It is recommended that network leaders be encouraged to collaborate on creating a strategic plan for the field with shared goals and strategies to achieve a 10-year vision for open education.

Formative Evaluation Goals and Overall Process



**Spark thinking
about how open
education networks
can learn and work
collectively.**

Formative Evaluation Goals

EVALUATION GOALS

At the request of the William and Flora Hewlett Foundation, edBridge Partners, LLC conducted a formative evaluation of the existing and potential open education networks in North America, and their role as drivers and sustainers of the open education field.

Since the open education movement began, multiple networks have emerged for educators, system leaders, and policymakers. The William and Flora Hewlett Foundation helped launch some of these networks to build awareness and understanding of open education or to engage specific communities. Others emerged more organically, championed by leaders in the field. These networks have demonstrated value in spreading effective approaches to open education policies and practices and will continue to be important for the Foundation's work in the education field.

These networks have grown in a relatively short period of time and the field continues to change. At this juncture, the Foundation wished to take stock of the current networks that are operating in the open education space, define their characteristics, and analyze how and to what extent these networks are serving the needs of key stakeholders and decision makers, and how the growth and success of these networks informs the growth and development of open education a field.

FORMATIVE EVALUATION GOALS

1. Examine how open education networks are engaging a diversity of educators, practitioners, and institutions.
2. Provide formative insights about the health of the field.
3. Spark thinking about how open education networks can learn and work collectively.
4. Inform how the Hewlett Foundation can be more intentional in how they support networks in creating more equitable learning opportunities for students.

The results of this formative evaluation helped to identify where there are areas that may need to be strengthened, and where there are gaps to be filled. The findings provide leaders and organizers of networks with evidence to inform how they can adapt and sustain their networks to meet the needs of their target audiences and the open education field.

PHASE 1 APPROACH: NETWORK MAPPING PROCESS

The first phase of this work entailed establishing a baseline mapping ("Network Map") of the current networks. In this first phase of work, we determined to what extent, and how, open education experts in academia, government, industry, and other relevant sectors began working together to establish their networks and what the representation of the current networks and Open education field looks like.

edBridge partners conducted the following activities to identify the important players in the open education field, the key flows of information across and within networks, and the organizations that are making their voices heard. These activities included:

- **Review of prior research and literature:** edBridge conducted a review of prior research conducted or funded by Hewlett, as well as seminal literature and briefs, on the topic of the open education field and open education networks.
- **Landscape analysis:** edBridge conducted a landscape analysis of both the higher education and K-12 sector open education fields to identify networks, map key players, and determine intersection/overlap between networks and sectors.
- **Interviews with key leaders:** edBridge conducted a series of interviews with leaders of prominent open education networks including SPARC, ISKME, and Open Education Global. The purpose of these interviews was to discuss findings from the review or prior research and review our landscape analysis to determine any gaps in the analysis.

PHASE 2 APPROACH: SURVEYS, INTERVIEWS, AND DIALOGUE DAYS

The second phase of this work involved surveys, in-depth interviews, and a series of Dialogue Days with different stakeholder groups to gather information about existing open education networks and the field. The goal of this research was to understand how the leaders in the field feel about the progress of the open education field; to help strengthen existing and emerging networks within the field; and to identify gaps and opportunities for new voices.

Phase 2 activities included:

- **Survey of Open Education Network Leaders:** We conducted two web-based surveys utilizing SurveyMonkey.
 - » Open Education Leaders Network and Field Survey: This survey was developed to examine the perceptions and beliefs of open education network leaders about their own networks as well as the field. Part 1 of the survey posed questions about respondents' own networks and their efficacy. Part 2 of the survey posed questions related to the open education field, such as what the field should focus on to be more effective; and where they see gaps in the field that need to be filled in terms of audiences served and network participants.
 - » Regional Networks Field Survey: This survey incorporated the same questions as Part 2 of the open education network leader survey, focusing solely on network leaders' perceptions and beliefs about the open education field. This survey was administered to the leaders of regional networks: states, provinces, and school districts. Due to a significant response from Historically Black Colleges and Universities (HBCUs) in our sample, results were disaggregated for these institutions and analyzed separately.

- **Moderated Dialogue Days:** Dialogue Days were facilitated conversations with predetermined groups of stakeholders. The discussions were guided by a set of questions, and participants were encouraged to interact with each other and to practice active listening. Each Dialogue Day session was 90-minutes long, except for the #OpenEd20 Session, which was constrained to 55 minutes due to conference format, and all were conducted virtually using Zoom and were recorded, with permission from the participants.
 - » #OpenEd20 – November 2020
 - » HBCU OER Initiatives – December 2020
 - » K-12 State & District OER Initiatives – January 2021
- **In-Depth Interviews with Open Education Network Leaders:** In October and November of 2020, edBridge Partners conducted a series of one-on-one interviews with thirteen leaders of networks characterized as influential networks in the Open Education field. These leaders represented long-established networks such as Creative Commons, higher education networks including the HBCU Affordable Learning Community, organizations such as ISKME & SPARC, and foundations such as the Rebus Foundation.

As a framework to guide the organizational structure for the design of the interview and survey protocols with network leaders and the final recommendation, edBridge adapted the *Strong Field Framework*¹ designed by the Bridgespan Group for the Irvine Foundation.

There are five components of the Strong Field Framework:

1. *Shared Identity: Do those working in the field identify as members of the field? Are they clear about what the field is collectively trying to accomplish? How well do individuals and organizations collaborate? Are there common approaches and practices to achieving an overall goal?*
2. *Standards of Practice: Does the field have codified practices? Are there demonstration models that members of the field are aware of? How well developed are the training and professional development programs for practitioners? Are there established organizations and processes to ensure quality?*
3. *Knowledge Base: How well developed is the evidence and knowledge base? Are there experts who research the field? How well is knowledge documented and disseminated?*
4. *Leadership and Grassroots Support: Are there influential leaders and exemplary organizations working to advance the field? Is there a broad base of support from key constituencies?*
5. *Funding and Supporting Policy: Is there sufficient funding for the field to achieve its goals? Is the policy environment supportive? Is the field actively involved in helping to develop the policy environment?*

¹ The Bridgespan Group (2009). The Strong Field Framework: A Guide and Toolkit for Funders and Nonprofits Committed to Large-Scale Impact. Accessed on April 2021 at <https://irvine-dot-org.s3.amazonaws.com/documents/64/attachments/strongfieldframework.pdf?1412656138>

In addition, edBridge added and evaluated a sixth component focused on the Vision and Future Direction, to capture the network leaders' outlook going into the future.

6. Vision and Future Direction: *What does the field need to do to have greatest impact and sustained success in the future? As the field matures, what are the most important gaps that need to be filled in terms of constituencies served or stakeholder voice? Ideally, what will the field look like in 10 years? What, if any, national or world events do you believe are affecting the potential for the advancement of the open education field?*

PHASE 3 APPROACH: ANALYSES, SYNTHESSES AND FINAL FINDINGS AND RECOMMENDATIONS

In the final phase of the evaluation, edBridge Partners facilitated a two-part Dialogue Day series with the leaders of open education networks. The impetus for these Dialogue Day sessions arose out of conversations during the evaluation in which open education leaders shared their self-reflections about DEI in their networks and the field, and their desire for greater sharing of plans and collaboration across networks.

The focus of part one was to share the draft of the findings of the evaluation of open education networks and the open education field and gather their input and feedback to inform the final report. The focus of part two was on the strategic plans for the participants' networks and specifically how the networks are contributing to diversity, equity, and inclusion (DEI) in the open education field. The goal of part two was to arrive at a set of shared learning questions with respect to how networks and the field might work collectively to advance DEI. In preparation for this second session, edBridge provided a set of questions to the network leaders to help organize their thoughts and actions related to DEI and their networks' open education work. This phase also included the final analysis and formation of recommendations to the Foundation and the field.

What Currently Exists? | Establishing a Baseline Mapping of Open Education Networks



**55/62 (89%) of
networks are free
to join.**

Key Findings from the Network Mapping

nappy.co Beautiful photos of Black and
Brown people, by @antoinedigital, licensed
under [CC BY 1.0](https://creativecommons.org/licenses/by/1.0/)

REVIEW OF PRIOR RESEARCH AND LITERATURE

The Hewlett Foundation provided edBridge Partners with a comprehensive set of open education background documents, research, and reports covering the seminal literature on open education from 2014 through recently conducted analyses by the Redstone Group on the Global Landscape of OER in 2019. These background readings described the early landscape of open education in both higher education and K-12, the concepts of open pedagogy, the open education ecosystem, and research on the effectiveness of open education.²

Additionally, the Foundation provided narrative summaries of various grantee networks' progress reports, which described current strategies and activities in detail.

These two sources of information were used to create a common conceptual understanding of the open education field and the positioning of the open education networks within the field.

LANDSCAPE ANALYSIS

To conduct a landscape analysis of the current open education networks, edBridge Partners developed a detailed taxonomy to describe the types of networks within the open education fields in both higher education and K-12. The first step in this process was to operationally define clearly and accurately what it means to be a network. Based on the literature and research reviewed, edBridge settled on the following definition of a network for this research: *"A network consists of various independent actors [who] develop relatively loose relationships between each other to pursue some common goals"*³. The literature also defined that networks share some form of administrative and managerial substructure that:

- Initiates the actual networking process,
- Formulates principles and guidelines for membership,
- Recruits members,
- Creates a communication infrastructure, and
- Facilitates the ongoing exchange among the members.

We also examined the key functions of networks⁴, which include the following:

- "Informative": the direct exchange of knowledge among educators, learners, stakeholders and institutions.
- "Professional development": opportunities for further learning and competence development.
- "Psychological": encouraging and strengthening individual members.
- "Political": the power of well-structured networks to influence policies.

² See Appendix for the list of papers reviewed.

³ Source: Networks of Innovation, Towards New Models for Managing Schools and Systems © OECD 2003 PART I, Chapter 3 Networking for Educational Innovation: A Comparative Analysis by Anne Sliwka University of Erfurt, Germany

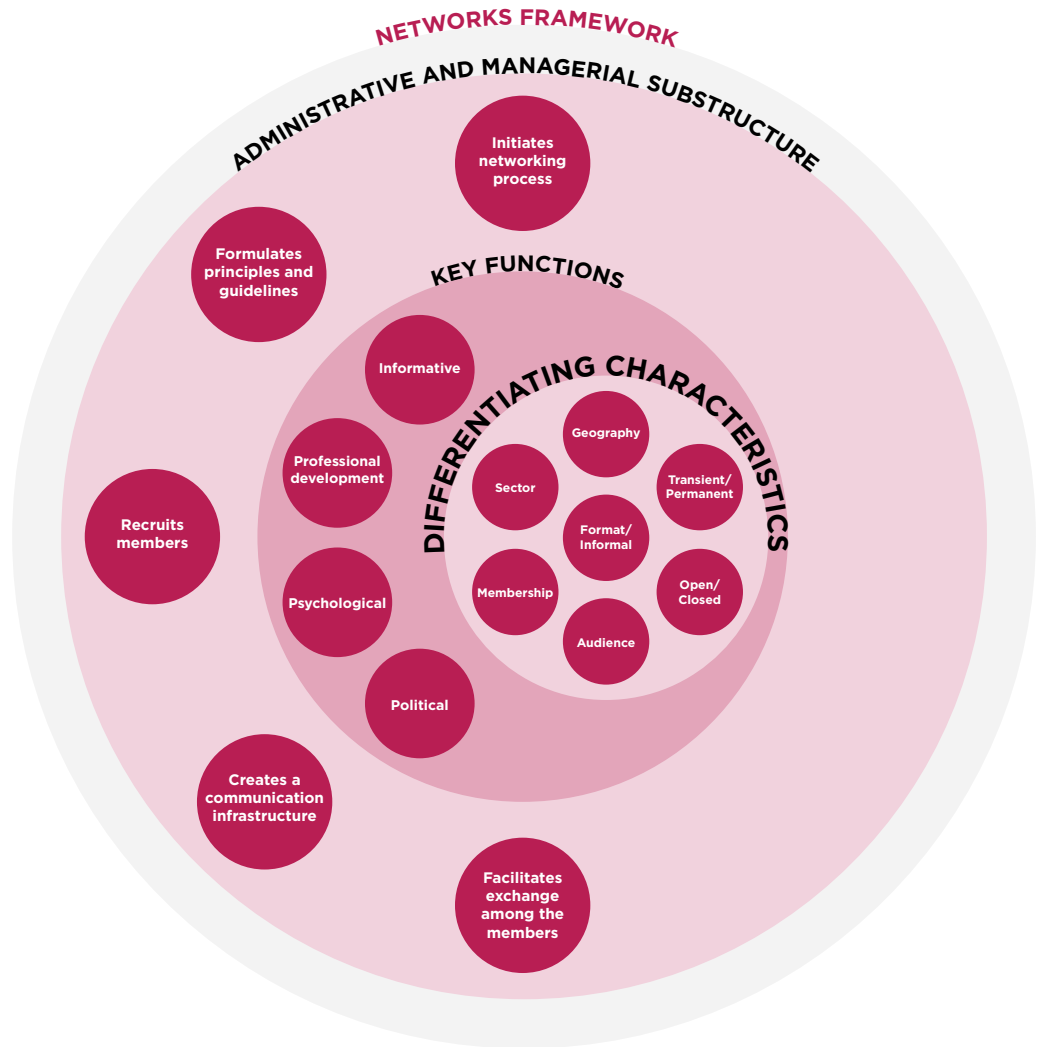
⁴ Source: Regional Education for Sustainable Development Networks: Learning Together, Acting together Policy Brief, Advancing ESD Policy (2018). Accessed May 2, 2020: https://en.unesco.org/sites/default/files/gap_pn1-_regional_esd_networks-_policy_brief_0.pdf

**What Currently Exists?
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Finally, for each identified network, we examined characteristics and differentiating factors, such as sector, geography, membership, audience, duration, and whether it is open or closed, formal or informal.

All together these make up our Networks Framework that was applied to determine whether an organization or gathering of people is indeed a network.

Graph 1. Networks Framework



SELECT INTERVIEWS WITH KEY LEADERS

During this process, it was critical to establish checkpoints where we could engage participation from the open education field to ensure the utility of the project and its outcomes for the field. To that end, the Foundation connected edBridge with several leaders in this space to review the approach and get their perspectives on the framework and the Network Map. edBridge conducted 1-on-1 interviews with the following leaders in open education:

- Kristina Ishmael, Director of Primary and Secondary Education, Open Education Global;
- Nicole Allen, Director of Open Education Networks, SPARC; and
- Lisa Petrides, CEO and Founder, ISKME.

The goal of these interviews was to discuss the landscape analysis and to determine whether they saw any missing networks in either of the sectors we analyzed. For this discussion, we focused on the following questions to consider when reviewing the network mapping:

- *Are there any organizations/ or networks that are missing from this mapping that you would want to include?*
- *Are any organizations or networks that you feel are mis-characterized and need to be moved to a different category?*
- *Are there organizations or networks in certain categories that you would want to prioritize in terms of interviews and follow-up?*
- *Are there any organizations or networks in this mapping that you would want to exclude?*

The results of these discussions helped to inform the development of the Network Map and how we thought about how the networks would be characterized according to different components.

NETWORK MAP

Using the network framework, along with knowledge of the field, internet research, interviews with leaders in the open education field, and recommendations from the Hewlett Foundation officers, edBridge curated a list of networks that focus on open education in any number of ways, including advocacy and policy, professional development, resource creation and dissemination, capacity-building and sustainability, research, and the promotion of diversity, equity, and inclusion in open education. Through this process we also identified organizations that have projects or activities related to open education, but do not yet have explicit networks, and networks that serve educators in higher education and K-12 well, but do not currently focus on open education.

We examined networks that meet the definition of a network based on the framework and have a primary focus on open education. These networks were characterized as **Influencer Networks**—those networks that have dominant voice in the open education landscape and that can effect change.

We also identified organizations that have activities in open education, and where it is a component of their work, but it is not a focal point in their overall mission. In some cases, these organizations met the definition of a network, in some cases they did not. Based on these factors, these types of organizations were characterized as **Developing Networks**.

We also determined that there exists a subset of networks that are well-developed and have a membership or audience that would be well-positioned to engage with open education but are not currently doing so. These are strong networks that meet the definition as defined, however they are not engaged in any work that relates to open education at this time. These networks and organizations warrant further examination on how best to engage or incentivize them to participate in the open education field, and we have characterized them as **Opportunity Networks**.

CREATION OF THE NETWORK MAP

For purposes of the Network Map, we focused on those networks characterized as *Influencer Networks* to establish our baseline mapping of current networks operating in the field. Although some of these networks operate globally and have international chapters, we focused on those that are primarily operating in North America and their work in the United States and Canada.

We looked at organizations that operate in both the K-12 and higher education space, as well as those that span both sectors. In some cases, the membership of the network and the audience they serve is the same, while in others the audience represents the beneficiary of the work of the membership. The duration of the network enabled us to identify those that are formed for a specific time-bound purpose, such as an event, versus those that are meant to be long-term. Some of these networks are open to all members of the field to join while others have a closed membership, some are fee-based and others are free, and some have more formal membership agreements while others are more informally organized.

Based on the mapping, edBridge developed two tools for the field:

1. [The Open Education Network Map](#), which allows users to search and filter networks based on differentiating characteristics such as:
 - » Sector: Higher Education, K-12, Both
 - » Geography: National, North America, Global, Canada, Statewide/Provincewide, District-wide
 - » Membership: Open, Closed
 - » Cost: Free, Paid
 - » Year Founded: (<3, 3-6, 7-10, 11+)
 - » Size: <50, 51-149, 150-249, 250-499, 500+
2. [Network Connection Visualization Tool](#), which allows users to visualize connections between institutional/organizational members of the major open education networks.⁵

⁵Note, this tool only includes those Influencer Networks whose membership is at the institutional/organizational level, not those who have individuals as members.

The Network Connection Visualization tool is intended to provide a high-level mapping of where the institutional and organization membership overlaps among the influential networks identified in this study. As such, this tool is limited to those networks with this specific type of membership.

It should be noted that there are influencer networks that have an extensive membership that extends across multiple layers and levels but do not fit within the confines of the tool. For example, while the networks represented focus on institutions and organizations, there are well-established networks that focus on states (such as the regional compacts) or individuals (such as Creative Commons) that could not be authentically represented here. These networks almost certainly have overlap among their individual members and may also have overlap in their state membership, for regional compacts. It is critical to have networks serving multiple types of stakeholders to provide services and support across all levels, but the limitations of this particular tool do not allow for the full nuance of the landscape.

KEY FINDINGS FROM THE NETWORK MAPPING

Sector: 41/62 (66%) serve Higher Education or both higher education and K-12. Those serving K-12 are primarily regional/local networks established by states or school districts.

Membership: 39/62 (63%) of networks have closed membership, meaning there are criteria for members to join. 23/62 (37%) of networks are open, meaning anyone can join. The closed networks tend to be those that are bounded geographically (i.e. must belong to the district, state, province the network serves).

Cost: 55/62 (89%) of networks are free to join.

Years Founded: 37/62 (60%) of networks were established within the last six years. The oldest open education networks were established in 2001 (Creative Commons) and 2003 (BCcampus).

Size: Size of networks vary from as small as 50 members to more than 500 members. In some cases, such as the regional/provincial/state networks, it is hard to determine exact membership size, as all institutions in the region/province/state may be eligible to participate.

Connections: All 15 of these influencer networks share members to some degree. The networks with the most connections between members are:

- SPARC Libraries and OER Forum (LibOER) - Open Education Network
- SPARC Libraries and OER Forum (LibOER) - FLVC Statewide Leaders in OER
- Open Education Network - SPARC Connect OER
- Open Education Network - FLVC Statewide Leaders in OER

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The overlap in connections could be due to several factors:

1. The networks serve a similar type of member: for example, librarians.
2. The institution/organization is connected to multiple networks but is represented on the networks by different individuals with different roles within the institution/organization.
3. The networks offer complementary services and support, and the members of those networks benefit from membership in more than one network.

There is a lack of national/global networks serving K-12 whether exclusively or together with higher education. 4/15 networks (27%) state that they serve both higher education and K-12, however aside from #GoOpen, the % of members that are K-12 is small. It is likely that there will be more growth in networks serving K-12 as use of open educational resources and practices expands in this sector.

The overlap highlights the opportunity for greater collaboration between the networks as they all have overlap to some degree and quite a bit of overlap in some cases. The overlap also highlights unique collaboration opportunities between networks that may not have thought about working together. There is an opportunity to raise awareness of networks among institutions and organizations that belong to just one network.

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Providing greater access to knowledge by making high quality educational materials and opportunities more broadly available, focusing on outcomes for students who have been marginalized in school systems.

Network goals | Equity

NETWORK ANALYSIS: WHAT'S WORKING FOR NETWORKS?

In September-October 2020, a web-based survey was administered to 25 leaders of open education Influencer networks, as categorized from the network mapping in Phase I. The response rate was 100%. Part 1 of this survey focused on their networks, while part 2 of the survey asked questions about the Open Education field.

Demographics

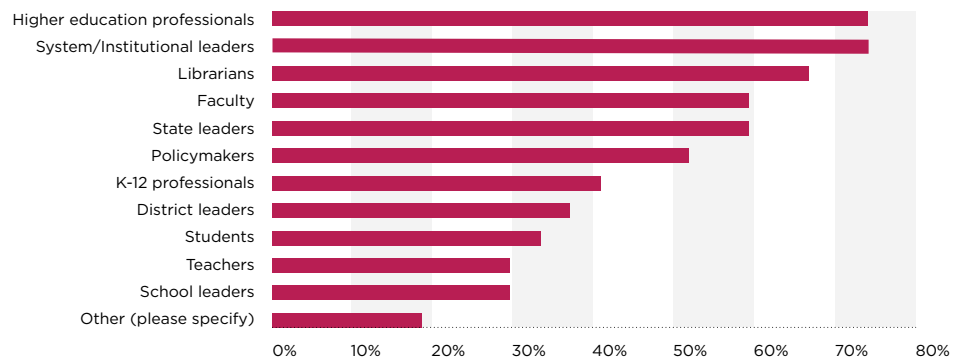
The characteristics of the leaders surveyed follow:

- Forty-eight percent of the leaders surveyed served in their current role for between 1-5 years.
- A majority of networks surveyed were formed between 2014 and 2020 and are relatively new.
- Seventy-eight percent have less than 5 staff dedicated to the operation of the network.
- Forty percent of the networks have less than 50 members, another 30% have between 51-149 members.

There was no direct correlation between the size of the network and the number of staff dedicated to the operations. Most of the networks had less than 5 staff supporting networks ranging from less than 50 members to over 500 members. Less than 10% had more than 20 staff members supporting the network's operations, indicating that resources are likely primarily dedicated to providing programs and services, and not towards staff. Some of the smaller networks are regional compacts that have a very large membership base when you look at a deeper layer of membership and all of the institutions within the states that belong to the compacts.

The network representation in the survey research skews towards higher education. Most networks surveyed serve higher education professionals (74 percent), system/institutional leaders (74 percent), and librarians (67 percent). Faculty (57 percent), state leaders (57 percent), and policymakers (50 percent). K-12 professionals (41 percent), district leaders (37 percent), and students (32 percent), teachers (29 percent), school leaders (29 percent), and other (please specify) (17 percent) are served less by our survey respondents.

Graph 2. Who is the audience or community served by your network (check all that apply)?



Funding

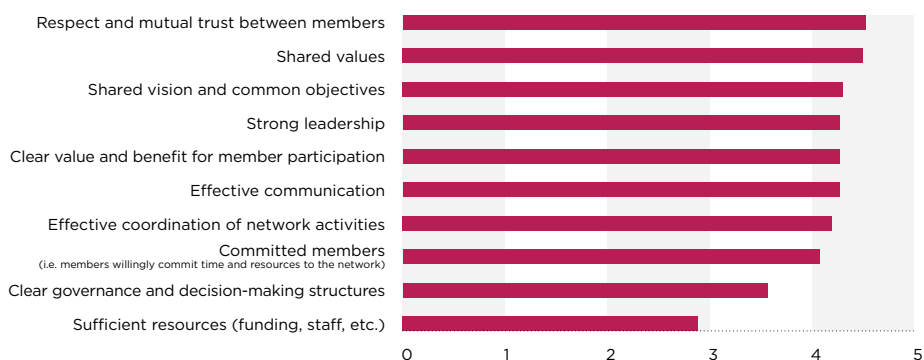
Foundation funding is the primary source of funding for most networks (nearly 80 percent). In addition, 25 percent said funding comes from membership fees and 22 percent said funding comes from service fees. To a lesser extent, government (7 percent) and private donors (7 percent) provide funding. Other funding sources include parent organizations that cover operating expenses or offer in-kind services.

Factors of strong networks and leaders' self-assessment

Respondents Agree/Strongly Agree that respect and mutual trust, shared values, shared vision and common objectives, and strong leadership are true for their networks.

Respondents felt less strongly that clear governance and decision-making structures and sufficient funding were true for their networks.

Graph 3. Please rate the degree to which the following factors are true for your network.

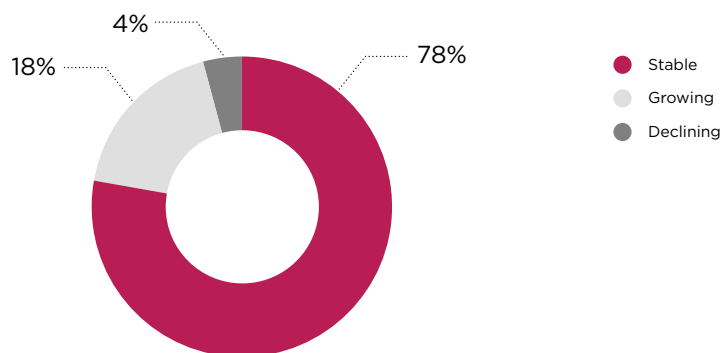


Network health and growth

Seventy percent of networks rated their networks' health as Good or Excellent. Most respondents equate growth in membership with network health. As expected, the impact of COVID-19 was a concern for the longer term.

Seventy-eight percent of network leaders described their network as growing. Given the relative newness of many of the networks in our survey (a majority were formed between 2014-2020), this is expected.

Graph 4. How would you describe your network membership?



Network activities

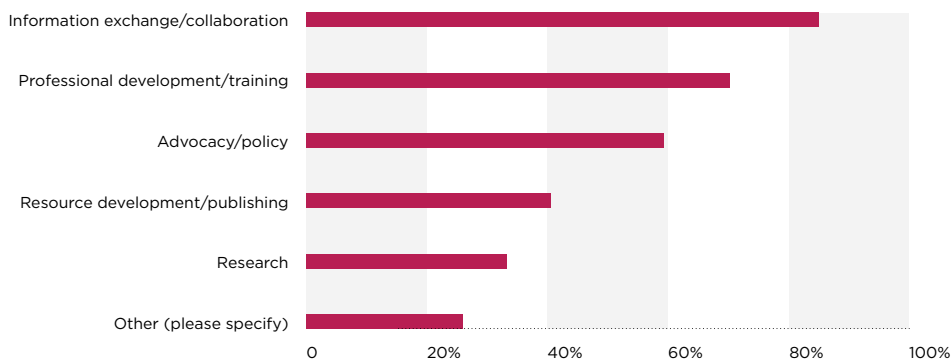
The network leaders were surveyed as to what the top activities for their networks were:

- Information exchange / collaboration: Facilitating exchange of knowledge among members and encouraging collaboration between members.
- Professional development / training: Providing opportunities for further learning and competence development.
- Advocacy and policy: Working together to organize campaigns to advocate for policies at various levels of government and within systems and institutions.
- Resource development / publishing: Facilitating the development of new openly licensed materials and resources, supporting the publishing of materials via a service, tool, or platform.
- Research: Conducting research on open educational resources, practices, or policies.
- Other

The leaders surveyed said their networks' top 3 activities include information exchange/collaboration (85 percent), professional development/training (70 percent), and advocacy/policy (59 percent). These activities reflect the networks' role as connectors, catalysts, and amplifiers for their membership and the field.

These broad areas are consistent with Hewlett's 2020 strategies for partners to sustain networks and advance open education.

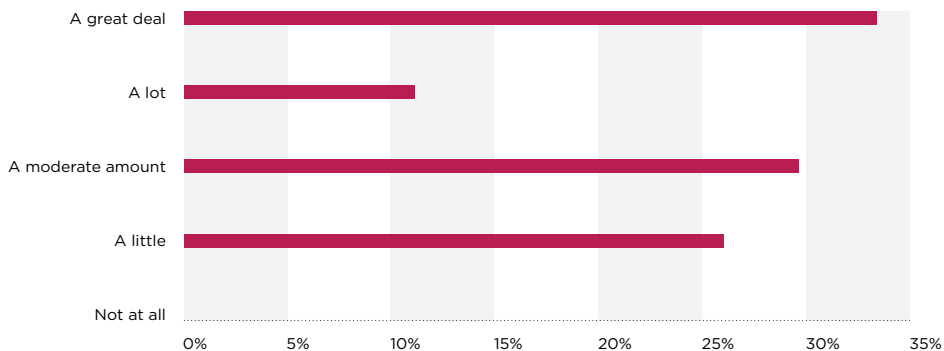
Graph 5. What are the main activities of your network (check all that apply)?



Diversity, Equity, and Inclusion

Responses varied on whether network activities specifically advance Diversity, Equity, and Inclusion (DEI): 26 percent felt their activities did a little to advance this, 29 percent felt they did a moderate amount, and 33 percent felt they did a great deal.

Graph 6. To what extent do your network activities specifically advance diversity, equity, and inclusion?



The network activities that advance DEI fell into 5 areas: Mission or Vision, Membership, Projects, Professional Development or Training, and Organizational Investment.

Where DEI is seen as integral to a network’s mission, vision, and values, DEI is more fully integrated into the network’s identity and culture, and embedded in all decisions, activities, and operations.

For networks where DEI is advanced through membership, diversity may mean different things: For some, diversity is having members from many different countries; for others, diversity means serving people from a range of social and ethnic backgrounds.

For many, DEI is not yet fully and seamlessly integrated into their networks' identity and core work. Efforts to advance DEI can seem ancillary, addressed through special efforts outside the most central activities of the network. Leaders cite special committees, work groups, agendas, curriculum modules, blogs, or models as specific activities that advance DEI.

Network goals

When respondents were asked to describe the goals and priorities of their networks, the most common network goals indicated by respondents were:

- **Equity:** Providing greater access to knowledge by making high quality educational materials and opportunities more broadly available, focusing on outcomes for students who have been marginalized in school systems.
- **Sharing / Collaboration / Developing a community of practice:** Ways of working within and across networks to achieve a shared goal, sharing knowledge, and working together to achieve goals or improve performance.
- **Capacity-building:** Building capacity in the field to use of open educational resources and practices, supporting creation and publication of open education resources by academic institutions, providing professional development for OER advocates, and creating sustainable business models for open education.
- **Advocacy:** Addressing the larger issue of the digital learning gap, raising awareness of open education, influencing policies, and showcasing promising practices that support OER implementation and sustainability.
- **Research:** Measuring outcomes, evaluating the benefits of OER, using data to design and scale promising practices.

Equity is different from the other responses in that equity is a major goal of open education, while the other responses indicate more strategies or ways of working to achieve a goal.

From open-ended responses the equity goal was described as providing greater access to knowledge by making high quality educational materials and opportunities more broadly available. Respondents also focused on the needs of students who have been marginalized in school systems.

- *"To advance equity to include anti-racism."*
- *"Promote recognition that equity is an essential characteristic of and embedded in high quality OER policy, practice, and research."*
- *"Increase equity by developing products that meet the needs of all students, especially disadvantaged students in under-resourced districts and schools, which particularly benefit from lower-cost, high-quality materials, professional development, and implementation support."*
- *"Provide more affordable and sustainable higher education options to learners excluded from the formal higher education system."*

Sharing / Collaboration / Community of practice

Sharing / Collaboration / Community of practice are ways of working within and across networks to achieve a shared goal. Respondents noted goals of sharing knowledge and working together to achieve goals or improve performance.

- *“To share and discover information about OER activities at campuses across North America.”*
- *“Collaboration with other regional compacts to boost OER equity and use nationally.”*
- *“To maintain a community of practice among the colleges.”*
- *“Provide a community of practice for a diverse network of open educators who share best practices, emerging trends, and collaborate through a variety of online and in-person activities and forums.”*
- *“Network together open education efforts around the world so they learn from each other.”*
- *“Plan, organize, convene and host open education events.”*

Capacity-building

Capacity building is important because, when it is coupled with the implementation component, it can lead to network success and sustainability. Respondents said capacity- building as a means of increasing open education usage, supporting creation and publication of open education resources by academic institutions, providing professional development for OER advocates, and creating sustainable business models for open education.

- *“Increasing the use of high-quality, standards aligned curriculum in classrooms and supporting teachers to use these materials effectively. There is a clear and dedicated focus to supporting districts and schools that include students of color, low-income students.”*
- *“Help academic institutions create/publish open educational resources.”*
- *“The main goal is to train and coach individuals and small teams at institutions to become OER advocates and to encourage OER adoption on their campuses.”*
- *“Create a sustainable business model for full-course, openly licensed curricula that funds the ongoing development and continuous improvement for pre-K-12 math and ELA curricula and aligned professional learning.”*

Advocacy

Advocacy was cited as a means to address the larger issue of the digital learning gap, and to raise awareness about open education and influence policies. Advocacy was also cited as a means to showcase promising practices that support OER implementation and sustainability and move from building capacity to building infrastructure.

- *“To advocate for and address closing the digital learning gap.”*
- *“Open education advocacy and awareness raising.”*
- *“Build awareness and capacity for OER implementation at the state level.”*

Research

Research is cited measuring outcomes, evaluating the benefits of OER, using data to design and scale promising practices. It was also cited to share and learn about effective practices across networks. Respondents also noted a goal to conduct research to measure outcomes in terms of equity and access.

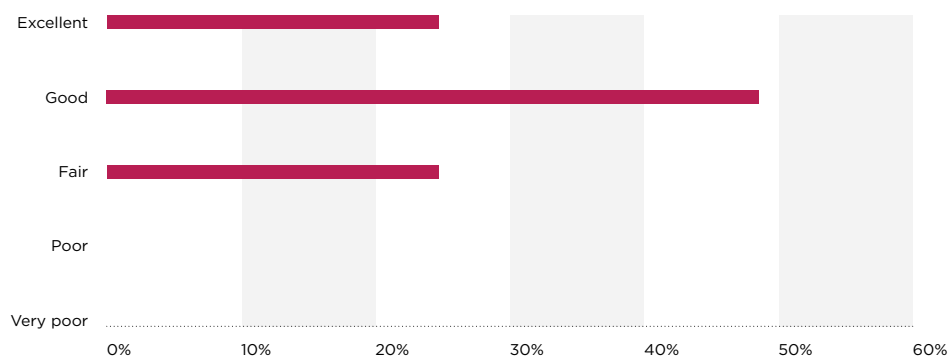
- *“To research, design, and scale effective innovations.”*
- *“Improve research base with a particular focus on equity in outcomes, OER creation, and access to OER by under resourced and minority-serving institutions.”*
- *“Conduct and share research on benefits of OER implementation.”*

It should be noted that most of the areas that are cited as goals by network leaders are more aptly described as strategies. While they are consistent with the Hewlett Foundation’s priorities and sub-strategies for open education, they do not have clear measurable outcomes and are not time bound.

Achieving strategic priorities

Seventy-four percent of respondents rated their networks as Good or Excellent in terms of achieving their strategic priorities. Twenty-six percent felt their networks were Fair in terms of achieving their strategic priorities. There were no ratings of Poor or Very Poor.

Graph 7. How would you rate your network in terms of achieving your strategic priorities?



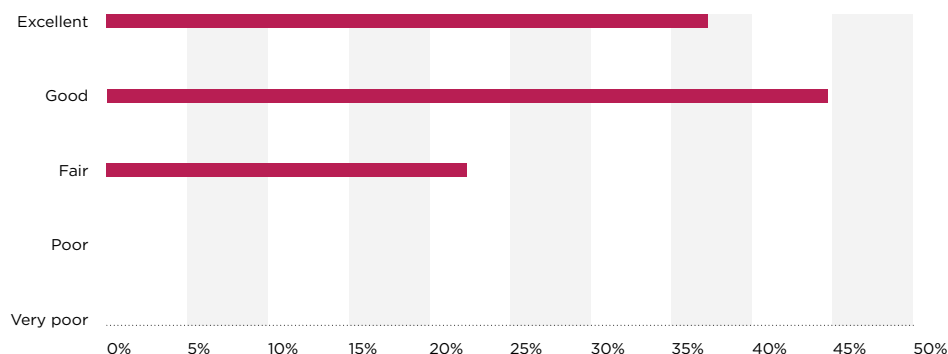
Of those who rated their network as Fair in terms of achieving their goals, many cited lack of funding, limited staffing, and their short time in operation as barriers.

Respondents who rated their networks as Good or Excellent in terms of achieving their goals believe they are making good progress, delivering value, and doing quality work. Some respondents said they did not have a systemic way to assess progress or quantify success.

Effectiveness in serving stakeholders

Seventy-seven percent of respondents rated their networks as Good or Excellent in terms of serving their audience/stakeholders.

Graph 8. How would you rate your network in its ability to serve its audience or stakeholders?



Strong relationships as well as established systems and mechanisms within their networks helped leaders expand reach and best serve stakeholders.

Those who rated their efforts as Fair feel constrained by limited resources or feel their efforts should be more intentional and focused to be effective.

FIELD ANALYSIS: WHAT'S WORKING FOR THE FIELD?

Part 2 of the Network Leader Survey focused on questions related to the Open Education field. The data are disaggregated between higher education respondents and K-12 respondents.

Factors of a strong field and leaders' self-assessment of field

When the data were disaggregated between higher education respondents and K-12 respondents, there were differences in answers to this question.

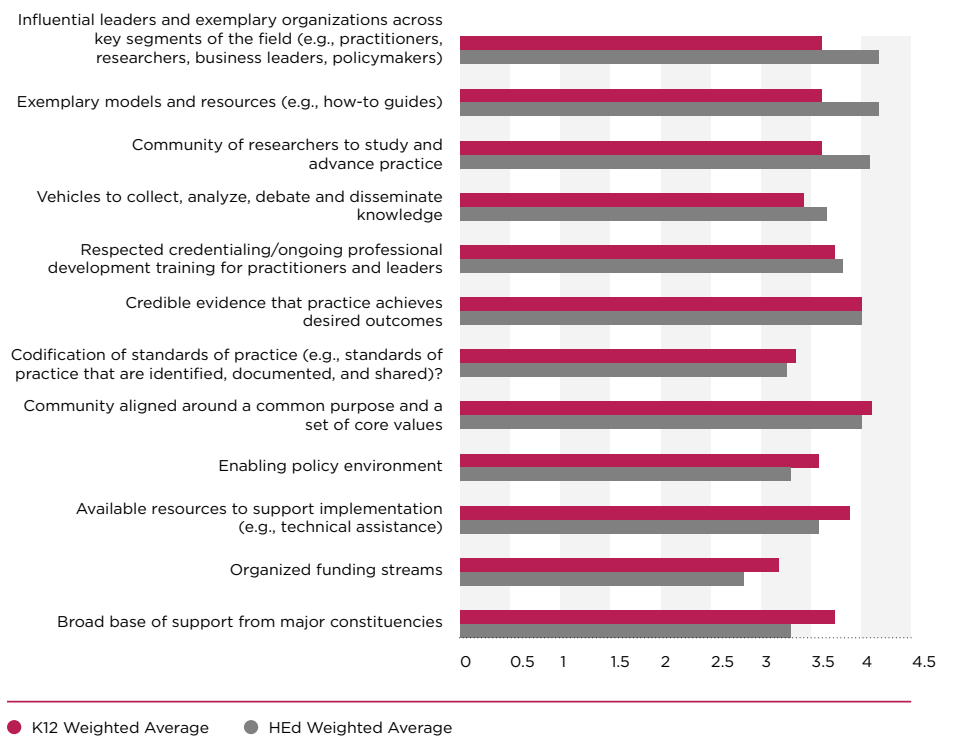
The factors that topped the list as true for the open education field from the higher education network leaders included: influential leaders and exemplary organizations, exemplary models/resources, and a community of researchers to study and advance practice. As leaders, these are factors for which they have direct responsibility and strong influence. Higher education respondents said less prevalent factors in the field are codified practices, broad based support from major constituencies, and organized funding streams.

For K-12, the most prominent factors for the field were a community aligned around a common purpose and a set of core values and credible evidence that practice achieves desired outcomes.

K-12 respondents agreed that less prevalent factors in the field are codified standards of practice and organized funding streams, but also rated lower vehicles to collect, analyze, debate, and disseminate knowledge. This may be related to the fact that most national organizations serving as disseminators and connectors are primarily serving a higher education audience, and that these K-12 regional networks are largely without national networks.

Interestingly, K-12 respondents also rated lower the two top factors for higher education respondents: influential leaders and exemplary organizations and exemplary models/resources. This may be an indication that the K-12 sector is not as far along in terms of developing a community/field around OER.

Graph 9. Please rate your agreement with how well the following factors reflect the open education field.



Field goals and leaders' self-assessment of how well the field is achieving those goals

Respondents said that the broad goals for the Open Education field are:

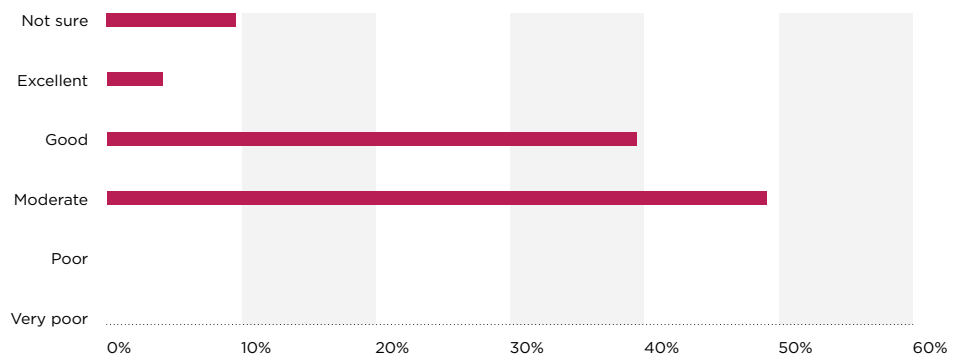
- **Access and Equity:** access to effective open educational resources, advancing education as a common good, providing equitable access to diverse populations, tailoring to the needs of different students.
- **Advocacy:** developing and advocating for open education priorities and practices, promoting policies to sustain open educational practices.
- **Scale and Growth:** Widespread implementation of OER materials, support for the creation, curation, and implementation of open education, growing use of open educational resources and practices at the institutional, system, and state level.

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- Sustainability: Developing a common infrastructure to support the operation of open education, sustaining open education efforts at institutions, systems, and states.

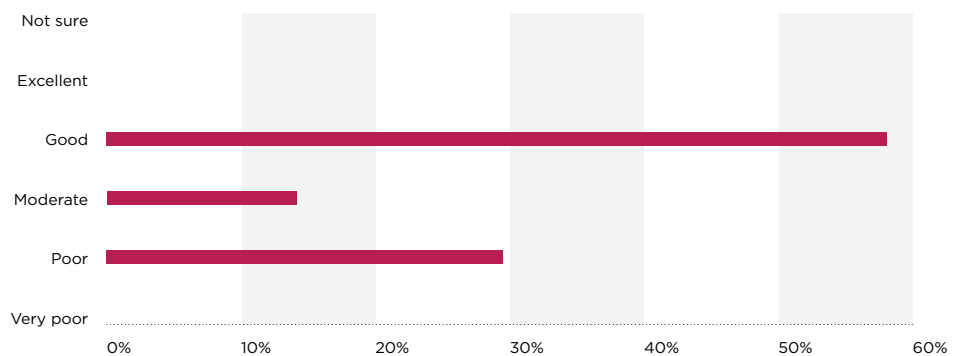
The largest proportion of respondents rated the field as Moderate/Fair (47 percent) in achieving its goals. 39 percent rated the field as Good, and just 4 percent felt the field was Excellent. From open-ended comments, there is a sense that progress has been made, but much work needs to be done to grow, scale, and sustain the open education field. Many respondents indicate that divisions in philosophy and different factions in the field present barriers to achieving the field’s goals. There are also many pointed comments about the small number of committed and passionate people who are responsible for the field’s achievements.

Graph 10. How would you rate the open education field in terms of achieving those goals?



When the data are disaggregated between higher education respondents and K-12 respondents, there were differences in answers to this question. Fifty-seven percent of K-12 respondents rated the field as Good, 14% Moderate, and 28% Poor in terms of achieving the goals referenced in the prior question.

Graph 11. K-12 Respondents Only: How would you rate the open education field in terms of achieving those goals?



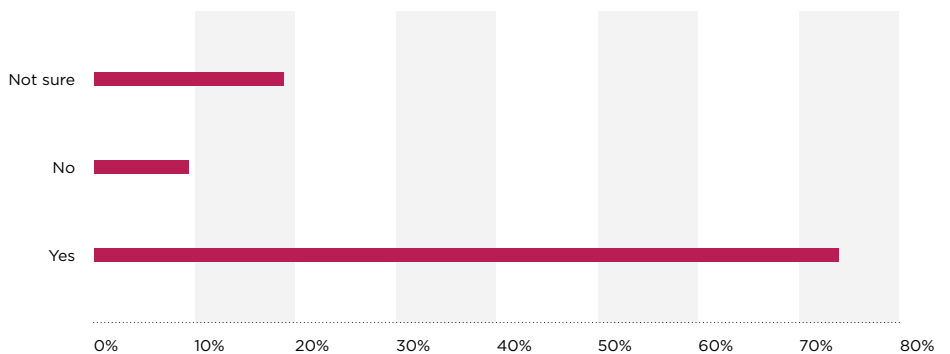
In comparison to Part 1 of the survey, respondents rated their own networks more highly than the field in terms of achieving goals. Respondents in higher education feel the field has exemplary leadership, a strong community aligned around common purpose and shared vision and values, and excellent resources and models. These factors are particularly important in a developing field that requires transformation and broad systemic change to be successful. K-12 respondents felt that the field's top factors included an aligned community, credible evidence, and available resources to support implementation. Respondents from both sectors were less likely to feel there were codified practices, broad support from major constituencies, and sufficient organized funding in the field. These factors are critical to sustaining open education.

It should be noted that as we explored this question during the interviews with network leaders, it seemed that there were different perspectives on what the open education field is collectively trying to accomplish. Some network leaders felt that the main goal for open education is to serve as a way to transform education through OER and open pedagogy. Others stated that the main goal is leveraging open education as a tool for increasing affordability, access, and learning outcomes. Perspectives seemed to depend on when you entered the field. Early activists and evangelists focused on the idea of open pedagogy and the philosophy of openness, while those who entered the field later tended to focus on learning outcomes, affordability, and access as the highest priority goals.

Effectiveness in serving stakeholders

Nearly three-fourths of respondents surveyed indicate there are still gaps in terms of audience/stakeholders effectively served by the open education field. Less than 10 percent felt there were no gaps.

Graph 12. Do you think there are gaps in terms of audience/stakeholders effectively served by the open education field?



The participants in this study who responded that there were gaps in this area, four specific sets of stakeholders and audiences were identified:

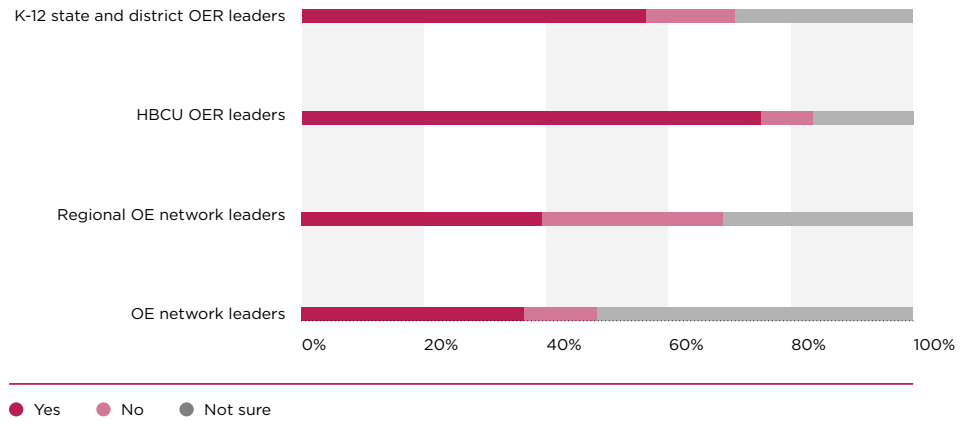
- Minority-serving institutions
- Underserved student populations including BIPOC and rural student populations, and students with disabilities.
- K-12 practitioners
- K-12 and higher education leaders and upper-level administrators

To serve these stakeholders more effectively, especially the minority-serving institutions and students who have been marginalized in school systems, respondents felt that there needs to be broader support for open education and a shift in thinking about open education from the fringe to the mainstream of education. They also felt that engaging with students is a critical component of this, as they are the primary beneficiaries of open education resources and services.

New networks

There is uncertainty across the field when asked whether new networks are needed in the field. Results for this question varied by the different groups of open education leaders.

Graph 13. Are new networks needed to grow and sustain the open education field?



The following felt there is a need for new networks:

- 35% of national network leaders
- 39% of state and regional network leaders
- 75% of HBCU leaders
- 57% of K-12 leaders

Those that felt new networks were not needed thought it might be better to focus efforts to consolidate and strengthen existing networks and broaden awareness and use of their resources.

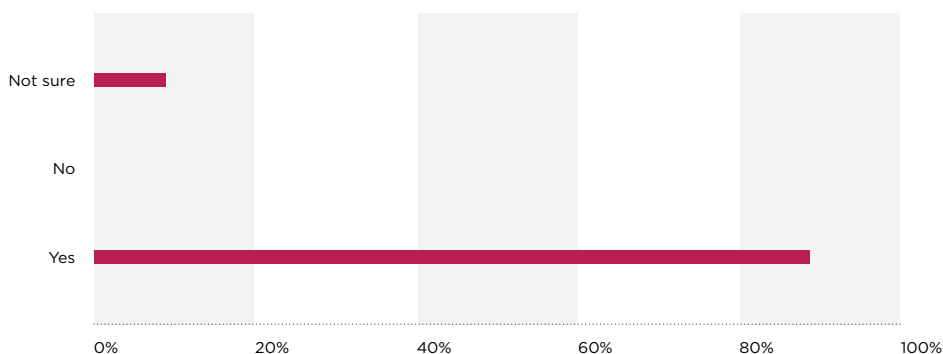
Of those higher education leaders that felt that new networks were either not needed or were unsure, they thought perhaps it might be better to consolidate or strengthen existing networks. This contrasts with K-12 respondents, the majority of whom stated that new networks were definitely needed and cited a need for standards and guidance across and between local networks to help provide the support they need to grow.

HBCU leaders who felt that there is a need for new networks noted that there are opportunities for more intentional and deeper partnerships with other organizations both within and outside of the field. They cited cultivating support for OER by engaging with community partners such as the NAACP and the Urban League to advocate for open education with local and state leadership.

Unmet needs, gaps and opportunities

There was almost unanimous agreement that there are unmet needs across the open education field.

Graph 14. Do you think there are unmet needs in the open education field?



Content Resources: In terms of resources, respondents said resources for new course development in both sectors. Specifically for highly technical subject areas and fields, career and technical education, upper division courses, ancillary materials to support texts. Needs remain for greater investment in capacity building and for finding ways to both create and share resources.

Research: Respondents said there are unmet needs in research in terms of evidence tied to the measurable impacts of student success and learning outcomes for all students, but especially pertaining to first generation and minority students. More research is also needed for effective pedagogy, and implementation practices. Research around the Return on Investment (ROI) and the financial impact of an investment in open education resources. Data showing the economic benefits of OER is needed in order to gain support from decision makers, institution and district leaders, policy makers, and foundations.

Awareness and Buy-in: In open education advocacy, there are needs for more mainstream champions and advocates outside the grassroots advocates/champions, and for simpler, more compelling narratives or communication, and common definitions used in the field to increase awareness and understanding of the open education field.

Shared Challenges

Overall, there are several shared challenges facing the field that were highlighted by the participants in this study, regardless of location or sector.

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Networks and the Open
Education Field

- Lack of awareness and understanding: In general, there is a need for greater awareness and understanding of OER in terms of what it is and what it is not, how it is developed, how it can be used, and what the potential impacts are.
- Perception of quality: The lack of awareness and understanding leads to skepticism about the quality of OER. The perception is that free equates to low quality resources.
- Research and data: Research and data are needed to demonstrate the measurable impacts of open education and open pedagogy on learning, and the financial benefits in terms of Return on Investment (ROI). This data is needed to help make the case with decision makers and legislators to support OER policies and actions.
- Lack of culturally-relevant content: Participants stated the need for more culturally-relevant materials for open education both in higher education and K-12. They also stated the need for more authentic and diverse voices to be engaged in all aspects of the open education field.
- Interoperability: Systems and technology used for OER must operate together in order to have greater ease and access to information related to open education, and to encourage greater adoption of OER.
- Tenure and promotion policies: Participants cited the need for OER institutional policies for tenure and promotion, and compensation for faculty time that takes work with OER into account. They believe that this will have a substantial impact on faculty adoption and use of OER and contribute to the sustained success of the open education field.
- Lack of continuous curriculum: K-12 participants highlighted the need for sequenced and continuous curriculum development. Too often, K-12 is leveraging OER in a supplemental manner due there not being a comprehensive library of sequenced, standards-aligned curriculum widely available yet. Higher education participants cited a need for more comprehensive whole course content packages that include ancillary materials, such as lecture slides, homework platforms, and assessment/test banks.

Diversity, Equity, and Inclusion

Participants stated that diversity, equity, and inclusion are important goals for their network, organization, institution, state, or district. But as with the network analysis, the consensus among participants is that the field is neither diverse nor inclusive enough, and for the most part the community lacks racial diversity in both its leadership and membership.

Future vision and direction

Overwhelmingly, participants wanted to see OER as the default option for both school districts and higher education and for OER to be integral to every aspect of education. They also stated wanting to have faculty that feel greater agency when using open education and having these resources help to create a more personalized learning experience for students. Ideally, they stated, the field would develop to be considered more of a professional practice than a grassroots movement, and that institutions, state systems and others would be working collaboratively and intentionally to scale and grow OER.

Recommendations

The Hewlett Foundation has taken a comprehensive approach to its Open Education strategy to achieve its goal of strengthening every students' learning experiences by the effective use of open educational resources and practices. This initiative was an opportunity for the Foundation to help shape the future direction of the field and “nurture a diverse and inclusive ecosystem that shares open content, practices, and resources.”

These recommendations align to the five components of the Strong Field Framework, referenced above and the additional sixth component focused on the Vision and Future Direction, to capture the network leaders' outlook going into the future.⁶



Engage in Exploration and Conversation around DEI, Social Justice, and Racial Equity for the Open Education Field.

Leadership and Grassroots Support
Recommendation 12

Do those working in the field identify as members of the field? Are they clear about what the field is collectively trying to accomplish? How well do individuals and organizations collaborate? Are there common approaches and practices to achieving an overall goal?

SHARED IDENTITY

The field as currently configured has exemplary leadership, a strong community aligned around common purpose, shared vision and values, and excellent resources and models. Network leaders strongly identify as members of the open education field and are a passionate and collegial group who value sharing knowledge and information with their peers. These factors are particularly important in a developing field that requires transformation and broad systemic change to be successful.

Conversely, network leaders also described a field that is not as cohesive as it could be. Some leaders are dedicated to OER as a tool for affordability and access to a quality education from a more practical and an economic standpoint; and the other leaders are dedicated to more philosophical view of “openness” and see transformational change of the education system through OER and open pedagogy, focusing on the democratization of authorship. However, all fields need both visionaries who may be more philosophical and can paint a bigger, aspirational view for the field, and pragmatists who take a more practical, incremental approach and drive implementation and build capacity from the ground up.

Importantly, the goal of field building is not to make each organization follow the same strategy or approach; rather, it is to enable a variety of organizations to operate and collaborate more effectively, whether their efforts center on specific aspects of the field or are more broadly focused.

The participants in this study also identified gaps in serving four specific sets of stakeholders and audiences.

- Minority-serving institutions (HBCU)
- Underserved student populations: BIPOC and rural student populations, and students with disabilities.
- K-12 practitioners
- K-12 and higher education leaders and upper-level administrators

Most open education network leaders feel new networks were not needed to close gaps in stakeholders served and address unmet needs, but rather existing networks could be strengthened and consolidated to improve efforts to engage those who might benefit but are currently not involved in open education.

Recommendation 1:

Engage new stakeholders and develop new champions for the Field.

Shared identity is a cornerstone of a strong, cohesive field. New open education networks and members may not inherently identify as belonging to the field. For example, the leaders of the developing HBCU open education network currently feel less connected to the field and do not believe the needs of their members and students are being fully met by the services provided by the field. The mapping of the field developed for the evaluation also shows the HBCU network and K-12 networks as more disconnected from the other Influencer Networks, who have strong connections and share members. For these networks and the emerging or new networks to identify as a part of the field will require deliberate outreach.

Influencer Network leaders have expressed a desire to be more proactive and inclusive in reaching out to engage new groups in the field. It is recommended that leaders of these developed existing networks make intentional, planned efforts to reach out regularly to new or less connected networks to make certain that they feel welcome and valued as part of the field. Partnering influencer network leaders with new or developing network leaders, as both mentors and colleagues, for regular opportunities for meaningful collaboration-both formal and informal- can build important relationships within open education and bring newer networks more closely into the field.

Influencer Networks are able to undertake efforts to empower and provide agency to new stakeholders and offer opportunities to connect them with the field. Key is to have new members communicate what they need and want from the field and then help bring those resources to fruition in ways that best suit their constituencies. An example of this strategy is the Hewlett Foundation grant to the American Indian Higher Education Consortium in collaboration with the Open Education Network to grow efforts around open education with Tribal Colleges and Universities. The hope is that the same strong sense of shared identity that current network leaders feel is passed on to new networks as they are recognized as leaders and their voices are heard and integrated into the identity of the field.

Recommendation 2:

Create greater connections between K-12 and higher education open education networks to reinforce collaboration and common goals for the field.

A Network Connection Visualization Tool was created as part of the formative evaluation that allows users to visualize connections between institutional/organizational members of the major open education networks. The tool showed the lack of connections between networks with higher education memberships and the networks serving K-12. It is recommended that the higher education-serving and K-12-serving networks in the field work more closely together to strengthen connections and in turn strengthen the field. Closer collaboration between K-12 and higher education open education networks will help both sectors find common ground and work together with a sense of shared purpose to achieve the broad goals and vision for open education.

Recommendation 3:

Amplify diverse voices, empower others to create and share their work and to engage in decision-making for the field.

A core part of creating a shared identity in the field is making all members and communities feel valued and like they belong. Participants in the evaluation discussed the need for greater inclusivity in every aspect of the field, and for more proactive and deliberate outreach to bring new people and different perspectives into the work. Participants defined inclusion as being welcoming, having a sense of belonging, being valued, and participating in decision-making.

To create a strong affiliation with the field, network leaders felt it was their responsibility to empower others to create and share their work and to bring new voices and members into the decision-making in their networks and the field. It is recommended that network leaders proactively seek new membership and new voices for their networks, promote the work of these new members,

and ensure that their decision-making bodies represent the diversity of membership in both their network and the field at large.

Does the field have codified practices? Are there demonstration models that members of the field are aware of? How well developed are the training and professional development programs for practitioners? Are there established organizations and processes to ensure quality?

STANDARDS OF PRACTICE

Standards of Practice are main components of field building. It includes well-developed training and professional development programs that support stakeholders and practitioners; and established processes and organizations to ensure the quality and fidelity of implementation.

Professional development in the field is increasing. Most participants in the evaluation felt the training and professional development offered by the field is good but needs to be made more widely available and conducted on a greater scale. However, there are also still gaps in professional development and training in the field.

Recommendation 4: Create More Faculty-Centric Professional Development and Administrator Awareness

At the higher education level, it is recommended that more faculty-centric professional development be developed to help faculty understand open education and support their development and open licensing of courses and content for open education.

In addition to professional development, support from senior leaders, such as institution presidents, provosts, and academic department chairs is also important; and recognition or incentives the additional time and effort involved in creating OER would also increase adoption and use by faculty. The grant programs that some regional networks and university systems like BCcampus and the University System of Maryland using grant programs to reward and recognize faculty for open education development are meeting with success.

Recommendation 5: Integrate Open Educational Practices into Teacher Education Programs and Pre-Service Training

K-12 leaders in the evaluation indicated that too many new teachers enter the profession with little knowledge or awareness of open education. Most pre-service training and teacher preparation programs at colleges of education do not include courses about open education resources or pedagogical practices. This is a barrier to early adoption and use of open education in K-12.

It is recommended that curricula for open educational practices be created and integrated as required courses into the teacher preparation programs of colleges of education and teacher pre-service training. This would help ensure that new teachers enter the education field with a strong foundation and working understanding of open education as well as a comfort in creating, adopting, and using open education resources early in their practice. Targeting aspiring and new teachers will support the long-term growth and sustainability of the open education field in both K-12 and higher education.

It is recommended that a pilot program be conducted with a few colleges of education to create and teach curricula about open education and open pedagogy as a required part of their programs' coursework and with districts or schools where they begin their careers. Importantly, this type of activity is cross-sector. Research can be conducted with both professors and students about the experience and effectiveness of these efforts. New teachers can provide feedback on how the coursework translated into their classroom practice. With successful iterations, the open education curricula can be refined serve as models for all colleges of education.

Recommendation 6: **Provide More Professional Development for Network Leaders**

The influencer networks reported that their primary network activities include information exchange and collaboration, professional development and training, and advocacy and policy. These activities reflect the networks' view of their role as connectors, catalysts, and amplifiers for their membership and the field—and underscore their position as capacity builders.

However, throughout the survey and discussions during the evaluation, network leaders expressed feeling less confident or rated their networks' effectiveness lower in important executive management areas such as governance, fundraising, change management, and strategic planning.

As the field matures these skills become increasingly important. Professional development for field leaders in management and organizational leadership is critical to expand their capabilities, enhance their careers, and, importantly, develop their staff, members, and network to elevate the field. It is recommended that the following suite of professional development opportunities be offered and supported, through stipends or funding, to open education network leaders:

- **Training on Nonprofit Governance and Fundraising:** Network leaders are less confident about their abilities and activities in governance, clear decision-making, and fundraising. It is important to be proficient in these areas as organizations grow. Most open education leaders are relatively new to their positions (less than 5 years) and their networks are still developing (1-5 years). As they continue to develop, there is a greater need for strong governance and clear decision-making to sustain and manage networks. These network leaders would benefit from training in building their capacity and working knowledge of the basic tenets of nonprofit governance. Organizations such as Board Source and Center for Nonprofit Excellence offer training, resources, and certifications in nonprofit governance and fundraising. Providing a stipend or incentives for open education leaders to undertake professional training in this area would be beneficial.
- **Change Management:** Leaders engaged in broad scale transformation and change within large systems benefit from knowledge of the principles of the change management process. Leaders in open education are working to transform education at many levels and affect change in culture, behavior, and perceptions. Professional guidance or workshops on change management would add to the knowledge, skills, and capacity of network leaders. Change management courses for

non-profits are available at many universities and business schools, and from professional management training organizations. The American Council on Education (ACE) also has excellent courses in this and other management areas. It is recommended that opportunities to attend these courses be afforded to open education network leaders through financial support or stipends.

- **Assistance in Strategic Planning:** Throughout the evaluation, leaders across network types—influencers, regional, HBCUs, and K-12—expressed a need for assistance in strategic planning. While some open education networks, particularly those who entered the field early, have very solid, professional plans, many networks do not and are not sure where to begin. In many areas of the evaluation, it was found that networks goals can be overly broad and difficult to measure, strategies are unclear, and long lists of action items or activities go beyond the capability or capacity of an organization; and cannot be implemented or scaled. This is not unusual; according to the Harvard Business Review⁷, 85% of leadership teams spend less than one hour per month discussing strategy, and 50% percent spend no time at all. The research also reveals that, on average, 95% percent of an organizations' staff don't understand its strategy and 90% percent of organizations fail to meet their strategic goals. Planning is essential.

It is recommended that technical assistance be offered to all network grantees that need and want support in their strategic planning. It may be beneficial to help grantees get on similar planning cycles. Technical assistance in strategic planning provides a clear, simple way to get started and helps leaders think about and articulate their goals and how they aim to achieve them. It also is recommended that the Foundation encourage networks to share (all or parts of) their plans—either explicitly or through conversation—to find common areas where networks can learn from one another and have a greater sense of where they share goals and projects.

Recommendation 7:

Continue to Build Interoperability and Infrastructure for OER

For many network leaders, interoperability of platforms to author, publish, share, and teach with OER continues to be a major goal. The inability for systems and platforms to work together continues to be a major barrier for both K-12 and higher education stakeholders. It should be noted that this is a complex, major issue across education and is not exclusive to open education.

It is recommended to establish an open education taskforce for K-12 and higher education that can help move interoperability forward and keep the field abreast of progress in this area. Some higher education open education networks, such as DOERS³, are also looking into this issue. Task force members would need to understand both IT and open education. Open education needs could be brought to the attention of efforts such as Project Nessie: Nurturing Engagement & Support for State Education Interoperability Efforts (SETDA) and state agencies working on the issue of interoperability.

⁷ Kaplan R.S. & Norton, D.P. (2005). The Office of Strategy Management. Harvard Business Review Magazine. Accessed April 2021 at <https://hbr.org/2005/10/the-office-of-strategy-management>

How well developed is the evidence and knowledge base? Are there experts who research the field? How well is knowledge documented and disseminated?

KNOWLEDGE BASE

Throughout the evaluation, network leaders expressed a need for research on the impact of open educational resources and open educational practices on both fiscal and student outcomes. They wanted to leverage the results of these impact studies to help secure additional funding from foundations and government sources.

Recommendation 8:

Continue to Fund Research into the Impact of Open Educational Resources and Practices on Student Learning

Having data around the impacts of open educational resources and open pedagogy on learning outcomes for students was cited by the network leaders as key data points to leverage in messaging and communications efforts to help support policy change at the district, state, national and institutional level. Leaders in OER stated that this type of information and data is needed for decision-makers to better understand that impact and value of OER beyond traditional measures of cost savings.

In addition to empirical research using experimental designs, it is recommended that open education networks consider undertaking action research, applied research, or translational research that can be more easily applied to practice and would also be accessible and understandable to potential funders and decision-makers.

Recommendation 9:

Provide Support for States, Systems, Institutions, and School Districts to Calculate Return on Investment for Open Education

Return on investment (ROI) analyses would help open education stakeholders demonstrate the value of open education-beyond just cost savings- to decision-makers and funders in a format and language they understand and value. Network leaders across all types of networks included in the evaluation expressed a need to demonstrate the return on investment for OER and to identify experts who could help them calculate this measure for the field.

Network leaders want their members to be able to show the ROI for their specific efforts and communicate the results of that ROI analyses to their open education stakeholders. Networks want to have the ROI calculations to advocate for greater investment with potential funders and policymakers.

There may be opportunities for individual partnerships between network grantees and the business or financial offices or professionals within their systems to help develop their ROI. Networks can take the onus on establishing those relationships. However, if this proves too difficult to get share of mind or time from their business offices or finance teams, it is recommended that the Hewlett Foundation consider supporting ROI generation through technical assistance, putting together a small cadre of experienced professionals or a series of workshops to provide this service to grantees, using a consistent methodology.

Recommendation 10:

Continue to Develop a Communications Strategy to Spread Awareness of Open Educational Resources and Practices

In every aspect of the evaluation and across network leaders, improved communication, and greater awareness of OER among stakeholders and decision-makers were cited as areas of improvement. Insufficient communication about what open education is-and isn't- how it works, the licensing process, its benefits and value propositions, and its potential for students and educators is considered by leaders as a major barrier in both higher education and K-12 sectors. Better communication of the benefits and value of OER is needed across stakeholders, and decision-makers.

It is no wonder that network leaders continue to cite lack of awareness and understanding of OER as major barriers: Open education is both a straightforward concept and a complex paradigm. It touches and requires changes in almost every aspect of education. The field is grounded in theoretical and philosophical notions of “openness” and open education’s potential to transform education can be difficult to explain. Open education requires new ways of conceiving content ownership and creation, practice, and pedagogy that can be hard for practitioners and administrators to envision. Distilling the fundamentals of open education into clear and concise messages that can be understood and acted upon by several different sets stakeholders is extremely difficult. Further, open education may have different value propositions and solve different problems for the various stakeholders, influencers, and decision makers that impact the field. In any innovative field that involves change, its leaders and advocates must continuously communicate and reinforce the attributes and benefits of the field.

It is recommended that networks be encouraged to continue to work with an external communications firm, engaged by the Hewlett Foundation, as needed, to develop professional communication campaigns and materials that are stakeholder-specific and enhance the capacity of the networks to communicate and disseminate.

Recommendation 11:

Develop More Student-Facing Communications Materials

The benefits of open education for students should continue to be emphasized and highlighted. The evaluation found that many network leaders believe that communication for open education should be more student-centric and that too many students are unaware of the availability and benefits of open education at their colleges. It is recommended that networks work with an external communications firms, engaged by the Hewlett Foundation, to develop student-facing materials and messages that can be incorporated into materials that could be used by higher education institutions’ student services, advising, financial aid, and enrollment services staff who are in frequent and close contact with students. In K-12, these materials could be shared with PTAs, teachers, and school counselors to share with their students.

Are there influential leaders and exemplary organizations working to advance the field? Is there a broad base of support from key constituencies?

LEADERSHIP AND GRASSROOTS SUPPORT

There is currently strong and influential leadership working to advance the field. Network leaders identified several prominent individuals and exemplary organizations for their efforts across multiple areas in the field, including developing professional development and training, making connections, and sharing knowledge across organizations, spearheading advocacy campaigns and establishing policy.

Recommendation 12:

Engage in Exploration and Conversation around DEI, Social Justice, and Racial Equity for the Open Education Field

The consensus from the evaluation is that the field is neither diverse enough nor inclusive enough, and for the most part, the community lacks racial diversity in both leadership and membership.

The lack of diversity directly impacts the ability for the field to be equitable. Many open education leaders reflected that the community needs more authentic voices from different communities, and that their networks can do a better job of finding and engaging those who directly serve marginalized communities. These voices may be early career educators at community colleges, faculty at tribal colleges serving indigenous populations, and educators in urban districts. Overall, there is a strong belief in the potential of open education to enable diversity of authorship and include more inclusive content, but there has not been enough work around this yet to include those voices. Participants believe there is the need for greater inclusivity in every aspect of the field, and for more proactive and deliberate outreach to bring new people and different perspectives into the work.

Leaders were open and candid in discussing DEI and eager to work together to better understand the causes and solutions and ensure open education advances both racial equity and social justice in education and society.

The Hewlett Foundation's new Open Education Strategy calls for developing an inclusive field that is responsive to educators and learners. The Foundation's latest strategy includes active measures for the field to reflect and act in ways that create a better understanding of the bias and actions that serve as barriers; and remove those barriers at both system and individual levels. It is recommended that Hewlett sponsor a series of forums, dialogues and learning conversations to provide safe environments that support network leaders' individual reflection and shared learning about racial equity and social justice. The goal is to discover how DEI and social justice can be addressed within the field to ultimately realize the goals and vision of open education. From these conversations and learning questions, the field leaders can work together to arrive at self-understanding and active solutions to advance diversity, equity, and inclusion.

Recommendation 13:**Leverage Influencers to Bring More Participants into the Field.**

It is recommended that open education networks continue to cultivate and leverage partnerships with associations and organizations that are trusted by stakeholders and decision makers to expand and accelerate creation and adoption of OER. Partnerships can create allies and establish credibility for open education.

- **BIPOC communities and organizations:** Bringing BIPOC community organizations into the conversation can help incorporate the perspectives and experiences of this group into open educational resources by elevating their voices. Participants discussed engaging community partners such as NAACP and the Urban League as potential collaborators in advocating for open education with leadership at the local and state level. Organizations such as American Indian Higher Education Consortium (AIHEC), the American Association of Blacks in Higher Education (AABHE), the American Association of Hispanics in Higher Education (AAHHE), Gay, Lesbian, and Straight Education Network (GLSEN), National Alliance of Black School Educators (NABSE), and the National Association of the Deaf (NAD) and the Blind (NFB) are also good candidates to proactive outreach and engagement.
- **Minority-serving institutions:** Many of the institutions that first engaged with OER were private, elite, research-intensive institutions. Bringing in stakeholders such as minority-serving institutions can help develop awareness, support, and new champions in the field, and help to diversify content and make resources more relevant to a wider range of students. The HBCU Affordable Learning Network is a great example of a group of minority-serving institutions collaborating for such a purpose.
- **Rural schools, associations, and consortia:** Rural schools, associations, and consortia are cited as often having been left out of the conversations around OER. Sometimes dealing with limited resources, rural schools are among the groups that could most benefit from OER. Having a champion within this stakeholder group, such as the National Rural Education Association (NREA) would go a long way to make the case for expanded use of open educational resources in rural schools and communities.
- **Curriculum Directors:** All K-12 network leaders in the evaluation stated that the primary decision makers in K-12 are curriculum directors who have the say in whether OER is adopted and used in schools. While it is important to have the support from the district office, it is the curriculum directors who are the most vital for the success of open education networks. There has been little outreach to this crucial group. It is recommended that each state or district open education network leader create a communications and outreach plan for local curriculum directors. It is also recommended that the K-12 open education networks strategize together to determine an approach to come before ASCD, the Association for Supervision and Curriculum Development, with the case for open education in K-12.
- **Disciplinary and Educational Trade Associations:** Outreach and engagement with academic discipline associations, trusted and known by faculty, would add credibility and help dispel any questions around the quality of open educational resources. Trusted associations of which

many education stakeholders and decision-makers are members can be excellent partners to champion the field. Other recommended organizations for open education network partnerships include Association of American Colleges and Universities (AAC&U), the American Association of State Colleges and Universities (AASCU), the American Council on Education (ACE), AASA: The School Superintendents Association, American Association of Colleges of Teacher Education (AACTE), and the College Board.

Is there sufficient funding for the field to achieve its goals? Is the policy environment supportive? Is the field actively involved in helping to develop the policy environment?

FUNDING AND SUPPORTING POLICY

Much needs to be done to expand the funding sources for open education. The consensus among network leaders is that there is not currently sufficient funding for the field to achieve its goals. Most networks do not have self-sustaining business models yet.

Recommendation 14: **Expand Outreach to Funders with Complementary Missions**

It is recommended that networks compile lists of foundations or organizations that fund projects that include aspects of OER. For example, foundations that support efforts to increase diversity, equity, and inclusion; foundations dedicated to a mission of college affordability; funders focused on academic innovation in faculty or teacher pedagogy, could all be good targets to approach with ideas about open education. The Hewlett Foundation may also seek funding partners through its network in the philanthropy field.

Recommendation 15: **Seek Opportunities for Collaboration**

It is recommended that network leaders purposefully and routinely collaborate on initiatives and funding proposals and share or discuss strategic plans to find common areas and opportunities to join forces.

The Foundation could encourage its grantees to submit joint proposals, and seek other funders also look favorably on partnerships when considering grant applications. Joining forces and pooling their experience and expertise would not only increase the likelihood of funding and success for large-scale open education initiatives that require diverse capabilities, but also decrease competition among grantees for scarce funds and reduce duplication of efforts.

Recommendation 16: **Continue to Advocate for Changes to Institutional, State, and Federal Policy**

While leaders in the field are actively involved in helping to develop the policy environment for the open education field and are getting better at educating policymakers about how to leverage OER as a solution in their policy context, there is a sense that state and national policy support remains uneven. It was suggested that an independent trade organization

could be established to unify the field's policy advocacy and lobby for the field's interests with state and national legislators and policymakers.

At the state and federal level, it is recommended that more active partnerships be established between open education networks and policy organizations such as the National Conference of State Legislatures (NCSL), Council of Chief State School Officers (CCSSO), State Higher Education Executive Officers (SHEEO), National Governor's Association (NGA), and the Education Commission of the States (ECS). The associations are large and influential with state policymakers. Joint policy guides published by the open education field and these associations that highlight model policies and cost savings, and advocate for support for OER-first policies in language and formats that resonate with these policymakers can be helpful to further the cause. In addition, joint publications can help with dissemination of open education communications and secure conference sessions about OER at the NCSL, NGA, CCSSO, SHEEO, ECS, and other large policy-focused convenings. These annual conferences are very well attended with thousands of policymakers participating.

Further, regional, state, and district network leaders should try to work with government relations staff within their agencies to craft policy statements, arrange for presentations or testimony at hearings, and to identify an influential education champion who will put open education support in the local budget. If open education can become part of a Governors' education agenda that is ideal. Messaging around open education cost savings that benefit low-income students, and open education's important role in providing all students access to quality materials, thereby advancing equity, can be powerful.

Recommendation 17:

Include Open Education Activities for Consideration in Tenure and Promotion Decisions

Specific to higher education, respondents frequently cited the need for open education activities to be integrated into faculty tenure and promotion policies and the belief that this would have a substantial and immediate impact on faculty adoption and use of OER and contribute to the sustained success of the open education field. Some networks, including DOERS3, have recently crafted guidance for the ways that this might start to happen. As more systems and institutions modify their policies to embrace this change, more faculty will embrace this as the standard of practice.

What does the field need to do to have greatest impact and sustained success in the future? As the field matures, what are the most important gaps that need to be filled in terms of constituencies served or stakeholder voice? Ideally, what will the field look like in 10 years? What, if any, national or world events do you believe are affecting the potential for the advancement of the open education field?

VISION AND FUTURE DIRECTION

Shared vision and values are the cornerstones of successful organizations and strong networks. They are especially important for newer networks in a field, like open education, that seeks to both transform and innovate.

The shared vision for the open education field is that open education becomes the default option for both districts and higher education and will be integral to every aspect of education. Open education would be considered more of a professional practice than a grassroots movement, and that institutions, state systems and others would be working collaboratively and intentionally to scale OER.

K-12 networks added that their vision for open education included teachers feeling greater agency when using open educational resources and using open educational practices to create more personalized learning. In addition, the vision for open education would include open education the default choice when ordering classroom materials.

HBCU network leaders also emphasized a practical aspect of its vision where students were not required to pay for any course materials for their first two years of college.

Recommendation 18:

Create a Joint 10-year Strategy for the Open Education Field

It is recommended that network leaders be encouraged to collaborate on creating a strategic plan for the field with shared goals and strategies to achieve a 10-year vision for open education.

The Hewlett Foundation may engage a facilitator to help members of the field work through what planning process is best for them and how they want to come together to have the important discussions about what is needed to strengthen the field. In the next phase, support could be provided to network leaders to develop the strategic roadmap, project manage the process, and longer term, to implement the plan across grantees, and monitor progress against goals over time.

⁸ See <https://www.doers3.org/tenure-and-promotion.html>

Conclusions



There are great strengths in both individual open education networks and the open education field.

Systemic change is critical for solving some of the greatest social challenges in our nation today. One of the most important levers for bringing about systemic change is field building. This involves coordinating the efforts of multiple networks and individuals around a common goal and creating the conditions necessary for them to succeed.

The Hewlett Foundation's formative evaluation of the open education field, in collaboration with the field's leaders, is an important step towards uniting open education networks and organizations to work together in more powerful ways to build the field. During the evaluation, network leaders were thoughtful and candid in their discussions about where the field stands today. They identified gaps in stakeholders served and unmet needs. They were reflective and open to discussions about what needs to be done to increase diversity, equity, and inclusion and addressing racial equity and social justice in open education. One item noted in the Dialogue on Diversity, Equity, and Inclusion with network leaders was that this formative evaluation has been focused on North America. As such, the discussion of diversity, equity and inclusion has been North American-centric, and as one looks at the field from a more global perspective, it is worth considering whether there are different definition of diversity, equity, and inclusion that should be considered or employed.

In each of the major areas needed to build a strong field—shared identity, leadership and grassroots support, standards of practice, base of knowledge, funding and policy, and vision—there are strengths and robust elements, as well as weaknesses and significant gaps that will need to be addressed to advance the field and achieve the promise of open education.

The insights provided in this summary are based on the information provided by the leaders of open education networks in surveys, interviews, and group discussions; and from the depiction of the field from the mapping tool of the field created for the evaluation. The recommendations address issues and opportunities that came to the fore in communication across participants.

There are great strengths in both individual open education networks and the open education field. For a field that is relatively new and requires quite different ways to approach and view almost all aspects of traditional education systems—from the ways academic content is created, licensed, adapted, and used, to views on intellectual property, pedagogy, and delivery of courses—the progress in open education is remarkable. Progress has been spurred by a tight group of true champions and believers in the good that can be accomplished with open education and its ability to transform education for the benefit of all.

Importantly, open education networks have carved out strengths in specific areas of OER, whether in policy, advocacy, professional development, repositories, licensing processes, or as connectors. However, they also have taken it upon themselves to provide their members with a full complement of resources so they can easily access open education resources within their network, as needed. For a developing field, the quality and variety of resources available across networks is impressive.

The Hewlett Foundation has chosen to support grantees that have proved to be excellent stewards as well as passionate champions, and creative innovators for open education; as well as capacity builders for the field, and there is much opportunity to continue to build on this foundation in the future.

**Appendix A:
Open Education
Research and
Readings Reviewed**

2014

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- Bronwyn Hegarty, “Attributes of Open Pedagogy: A Model for Using Open Educational Resources,” https://upload.wikimedia.org/wikipedia/commons/c/ca/Ed_Tech_Hegarty_2015_article_attributes_of_open_pedagogy.pdf (2015)
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- I. Elaine Allen and Jeff Seaman, “What We Teach: K-12 School District Curriculum Adoption Process, 2017,” https://www.onlinelearningsurvey.com/reports/K-12oer2017/whatweteach_2017.pdf (2017)
- Christina Hendricks, “Open Pedagogy, Shared Aspects,” <http://blogs.ubc.ca/chendricks/2017/10/25/open-pedagogy-shared-aspects/> (2017)
- Lisa Petrides, Ameer Evan Godwin, and Cynthia Jimes, “Supporting Deeper Learning Through OER and Open Educational Practice,” <https://www.iskme.org/our-ideas/supporting-deeper-learning-through-oer-and-open-educational-practice-0> (2017)
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**Appendix B:
Individuals Consulted
(Survey, Interviews,
Dialogue Day
Attendees)**

I. Open Education Networks Leaders Survey

In September-October 2020, a web-based survey was administered to 25 leaders of open education networks, as categorized from the network mapping in Phase I. The response rate was 100%. Following are the networks represented by the leaders surveyed:

- Community College Consortium for Open Educational Resources (CCCOER)
- Connect OER
- Creative Commons Open Education Platform
- Creative Commons USA
- Driving OER Sustainability for Student Success (DOERS3)
- Education Technology Cooperative
- HBCU Affordable Learning Solutions
- IMPD Network
- League of Innovative Schools
- MHEC OER Initiative
- SREB OER Initiative
- National Consortium of Open Educational Resources (NCOER)
- OER Degree Initiative network
- OER universitas (OERu)
- Open Education at New England Board of Higher Education (NEBHE)
- Open Education Global
- Open Education Latin American Regional Node (open education LATAM)
- Open Education Network
- Open Up Resources
- OpenStax Institutional Partner Network
- Rebus Foundation
- SETDA OER Working Group
- SPARC Libraries & OER Forum (LibOER)
- SPARC Open Education Leadership Program
- Western Open Educational Resources Network (WICHE)

II. Regional Network Leaders Survey

In September-October 2020 open education leaders in states, provinces, and districts in the United States and Canada were administered a web-based survey to examine the perceptions and beliefs of open education network leaders about what the field should focus on to be more effective; and where they see gaps in the field that need to be filled in terms of audiences served and network participants. Forty-six people were sent the survey and twenty-nine responded for a response rate of 63 percent.

- Alabama Commission on Higher Education
- Barton Community College (Kansas)
- BCcampus
- Brooklyn Lab Charter School
- California State University, Office of the Chancellor
- Campus Manitoba
- Chesterfield County Public Schools
- City University of New York

**Appendix B:
Individuals Consulted (Survey,
Interviews, Dialogue Day Attendees)**

- Colorado Community College System
- Colorado Department of Higher Education
- Community College System of New Hampshire
- Connecticut State Colleges & Universities
- CT Commission for Educational Technology
- DVUSD
- eCampus Ontario
- Liberty Public Schools
- Mass. Department of Higher Education
- Open Oregon Educational Resources
- SUNY OER Services
- SUNY System Admin
- Texas A&M University System
- University of Colorado Boulder
- University of Texas System
- University of Wisconsin System
- University System of Georgia
- University System of Maryland
- Virginia Department of Education: #GoOpenVA
- Washington Office of Superintendent of Public Instruction
- Washington State Board for Community and Technical Colleges

III. HBCU Network Survey

As a large portion of HBCU leaders of open education networks responded to the Regional Network survey of the field, the data was disaggregated to examine their unique perspectives. Thirteen open education leaders from Historically Black Colleges and Universities (HBCUs) completed the survey. The survey focused on the Open Education field and perspectives and perceptions from these institutions.

Thirteen representatives of HBCUs responded to the survey; eleven represent 4-year institutions and two represent community colleges.

- Morehouse College
- Xavier University of Louisiana
- Central State University
- Lawson State Community College
- Dillard University
- Fisk University
- Motlow State Community College
- Arkansas Baptist College
- Southern University System
- Central State University
- Bethune Cookman
- Southern University at Shreveport
- Tennessee State University

IV. Network Leader Interviewees

- Nicole Allen, SPARC
- Amanda Coolidge, BCcampus

**Appendix B:
Individuals Consulted (Survey,
Interviews, Dialogue Day Attendees)**

- Kevin Corcoran, Connecticut State Colleges and Universities and Chair, Driving OER Sustainability for Student Success (DOERS3)
- Una Daly, CCCOER
- David Ernst, Center for Open Education, University of Minnesota
- Cable Green, Creative Commons
- Meredith Jacob, Creative Commons, USA
- Hugh McGuire, The Rebus Foundation
- Robbie Melton, Tennessee State University and Chair, HBCU AL\$ Network
- Lisa Petrides, ISKME
- Richard Sebastian, OER Degree Initiative, Achieving the Dream
- Tanya Spilovoy, WCET
- Paul Stacey, Open Education Global

V. Dialogue Day Attendees

Attendees of the #OpenEd20 Conference (November 12, 2020)

- Apurva Ashok, Rebus Community
- Angela DeBarger, Hewlett Foundation
- Stephen Downes, National Research Council Canada
- Sarah Hammershimb, Athabasca University
- Brian Hickam, Indiana Tech
- John Hilton, Open Education Group
- Laura-Beth Larsen, Central Lakes College
- Cailyn Nagle, US PIRG
- Niki Nguyen, Bunker Hill Community College
- Wilhelmina Randtke, Florida Virtual Campus
- Lora Redwine, Chemeketa College
- Ethan Senack, ISKME
- Fred Stemple, Garrett College
- Karrin Thompson, CommonLit
- Jocelyn Tipton, University of Mississippi
- Eric Werth, University of Pikeville

Leaders of HBCU OER initiatives (December 16, 2020)

- Effau Ampadu, Tennessee State University
- Deborah Chisom, Tennessee State University
- Monique Earl-Lewis, Morehouse College
- Andrew Lee, Fort Valley State University
- Jean-Jacques Medastin, Edward Waters College
- Robbie Melton, Tennessee State University
- Karen Nichols, Xavier University of Louisiana
- Marvin Reid, Central State University
- Eula Todd, Lawson State Community College
- Rona Tyger, Dillard University

Leaders of K-12 State and District OER initiatives (January 6, 2021)

- Pam Batchelor, North Carolina Department of Public Instruction
- Tammy Bonner, Pima JTED Career and Technical Education District
- Douglas Casey, Connecticut #GoOpen State Network

**Appendix B:
Individuals Consulted (Survey,
Interviews, Dialogue Day Attendees)**

- Erica Clay, INFOhio
- Gayle Galligan, Deer Valley Unified School District, #GoOpen Ambassador District Network
- Sam Kong, Wisconsin Department of Public Education
- Lori Lee, INFOhio
- Gina Loveless, Michigan Department of Education
- Barbara Soots, Washington #GoOpen State Network
- Jean Weller, Virginia #GoOpen State Network
- Jeanette Westfall, Liberty Public Schools, #GoOpen Ambassador District Network

Open Education Network Leaders Dialogue Series (March 16, 2021 and March 25, 2021)

- Nicole Allen, SPARC
- Amanda Coolidge, BCcampus
- Kevin Corcoran, Connecticut State Colleges and Universities and Chair, Driving OER Sustainability for Student Success (DOERS3)
- Una Daly, CCCOER
- David Ernst, Center for Open Education, University of Minnesota
- Katherine Fletcher, OpenStax, Rice University
- Cable Green, Creative Commons
- Gerry Hanley, MERLOT and SkillsCommons
- Meredith Jacob, Creative Commons, USA
- Al Kuslikis, American Indian Higher Education Consortium (AIHEC)
- Hugh McGuire, The Rebus Foundation
- Robbie Melton, Tennessee State University and Chair, HBCU AL\$ Network
- Lisa Petrides, ISKME
- Richard Sebastian, OER Degree Initiative, Achieving the Dream
- Tanya Spilovoy, WCET
- Paul Stacey, Open Education Global
- Daniel Williamson, OpenStax, Rice University

Appendix C: Network Map Deliverables

The Open Education Network Map and the Network Connection Visualization Tool are hosted by the Hewlett Foundation website.

1. [The Open Education Network Map](#), which allows users to search and filter networks based on differentiating characteristics such as:
 - » Sector: Higher Education, K-12, Both
 - » Geography: National, North America, Global, Canada, Statewide/Provincewide, District-wide
 - » Membership: Open, Closed
 - » Cost: Free, Paid
 - » Year Founded: (<3, 3-6, 7-10, 11+)
 - » Size: <50, 51-149, 150-249, 250-499, 500+

2. [Network Connection Visualization Tool](#), which allows users to visualize connections between institutional/organizational members of the major open education networks.

⁹Note, this tool only includes those Influencer Networks whose membership is at the institutional/organizational level, not those who have individuals as members.

Appendix D: Network and Field Survey Report

EDBRIDGE PARTNERS, LLC ON BEHALF OF THE
WILLIAM AND FLORA HEWLETT FOUNDATION

Formative Evaluation of Open Education Networks

Summary of Open Education Network Leader Surveys

UPDATED MARCH 10, 2021



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BACKGROUND

The William and Flora Hewlett Foundation engaged edBridge Partners to help evaluate and improve efforts around a critical component of their Open Education Strategy—developing an inclusive field that is responsive to diverse educators and learners. The purpose of the formative evaluation is to help clarify how and how well different networks are serving the needs of different communities, as well as whether and to what extent participation in these networks facilitates adoption and use of open education resources.

The first phase of this work established a baseline mapping of the open education networks active primarily within the US and Canada, in both K-12 and higher education. edBridge conducted a landscape analysis of both the higher education and K-12 sector open education fields to identify networks, map key players, and determine intersection/overlap between networks and sectors. We examined networks that meet the definition of a network based on the framework and have a primary focus on open education.

The next phase of this work involved surveys of leaders of open education networks, HBCUs, and regional OER networks to gather information about existing open education networks and the field. The goal of this research was to understand how the leaders in the field feel about the progress of the open education field; to help strengthen existing and emerging networks within the field; and to identify gaps and opportunities for new voices.

We adapted the Strong Field Framework created by Bridgespan Group for the Irvine Foundation as the organizational structure of the survey. The survey questions were developed around the following five components of the Strong Field Framework:

1. Shared Identity
2. Standards of Practice
3. Knowledge Base
4. Leadership and Grassroots Support
5. Funding and Supporting Policy

To get a more comprehensive perspective of the field, edBridge added and evaluated a sixth component that addressed Vision and Direction for the Future of the field.

We conducted two web-based surveys utilizing SurveyMonkey.

1. Open Education Leaders Network and Field Survey

This survey was developed to examine the perceptions and beliefs of open education network leaders about their own networks as well as the field. Part 1 of the survey posed questions about respondents' own networks and their efficacy. Part 2 of the survey posed questions related to the open education field, such as what the field should focus on to be more effective; and where they see gaps in the field that need to be filled in terms of audiences served and network participants. The questions are outlined in Appendix A.

2. Regional Networks Field Survey

This survey incorporated the same questions as Part 2 of the open education network leader survey, focusing solely on network leaders' perceptions and beliefs about the open education field. This survey was administered to the leaders of regional networks: states, provinces, and school districts. Due to a significant response from Historically Black Colleges and Universities (HBCUs) in our sample, we were able to disaggregate the data for these institutions and analyze it separately. The questions are outlined in Appendix B.

I.

Survey of Leaders of Open Education Networks

In September-October 2020, a web-based survey was administered to 25 leaders of open education networks, as categorized from the network mapping in Phase I. The response rate was 100%. Following are the networks represented by the leaders surveyed:

- Community College Consortium for Open Educational Resources (CCCOER)
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- HBCU Affordable Learning Solutions
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- MHEC OER Initiative
- SREB OER Initiative
- National Consortium of Open Educational Resources (NCOER)
- OER Degree Initiative network
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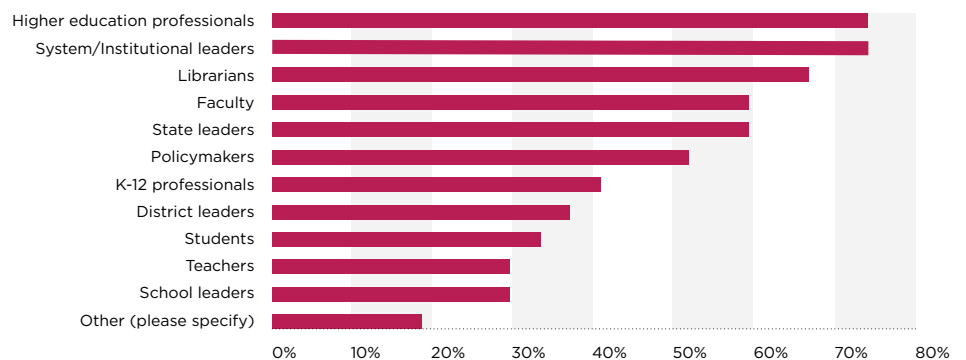
DEMOGRAPHICS

The characteristics of the leaders surveyed follow:

- 48 percent of the leaders surveyed served in their current role for between 1-5 years
- A majority of networks surveyed were formed between 2014 and 2020, and are relatively new
- 78 percent have less than 5 staff dedicated to the operation of the network
- 40 percent of the networks have less than 50 members, another 30% have between 51-149 members

The network representation in the survey research skews towards higher education. Most networks surveyed serve higher education professionals (74 percent), system/institutional leaders (74 percent), and librarians (67 percent). K-12 professionals (41 percent), districts (37 percent), and teachers (29 percent) are served less by our survey respondents.

Graph 1. Who is the audience or community served by your network (check all that apply)?

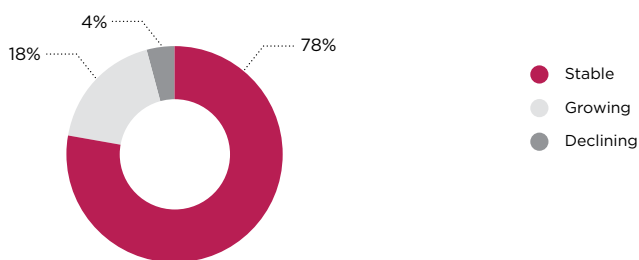


PART 1: OPEN EDUCATION NETWORKS

Network Growth

78 percent of network leaders described their network as growing. Given the relative newness of many of the networks in our survey (a majority were formed between 2014-2020), this is expected.

Graph 2. How would you describe your network membership?



- “We continue to receive new inquiries for membership and expand its current roster.”
- “Our community is growing, engaged, and impactful.”
- “We have added five states to advance this work. The states represent different geographic areas with diverse populations and contexts...”

Funding

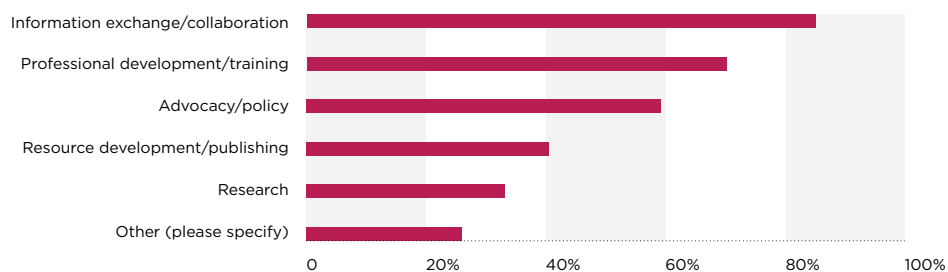
Foundation funding is the primary source of funding for most networks (nearly 80 percent). In addition, 25 percent said funding comes from membership fees and 22 percent said funding comes from service fees. To a lesser extent, government (7 percent) and private donors (7percent) provide funding. Other funding sources include parent organizations that cover operating expenses or offer in-kind services.

Network Activities

The leaders surveyed said their networks’ top 3 activities include information exchange/collaboration (85 percent), professional development/training (70 percent), and advocacy/policy (59 percent). These activities reflect the networks’ role as connectors, catalysts, and amplifiers for their membership and the field.

These broad areas are consistent with Hewlett’s 2020 strategies for partners to sustain networks and advance open education.

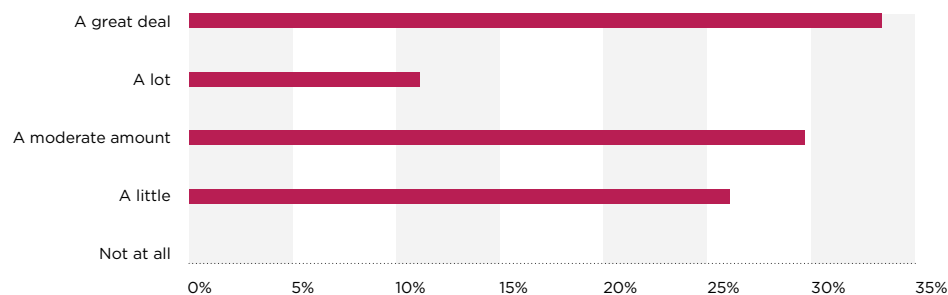
Graph 3. What are the main activities of your network (check all that apply)?



Diversity, Equity, and Inclusion

Responses varied on whether network activities specifically advance Diversity, Equity, and Inclusion (DEI): 26 percent felt their activities did a little to advance this, 29 percent felt they did a moderate amount, and 33 percent felt they did a great deal.

Graph 4. To what extent do your network activities specifically advance diversity, equity, and inclusion?



The network activities that advance DEI fell into 5 areas: Mission or Vision, Membership, Projects, Professional Development or Training, and Organizational Investment.

Where DEI is seen as integral to a network’s mission, vision, and values, DEI is more fully integrated into the network’s identity and culture, and embedded in all decisions, activities, and operations.

For networks where DEI is advanced through membership, diversity may mean different things: For some, diversity is having members from many different countries; for others, diversity means serving people from a range of social and ethnic backgrounds.

For many, DEI is not yet fully and seamlessly integrated into their networks’ identity and core work. Efforts to advance DEI can seem ancillary, addressed through special efforts outside the most central activities of the network. Leaders cite special committees, work groups, agendas, curriculum modules, blogs, or models as specific activities that advance DEI.

Mission/Vision/Values

- “DEI is embedded in our community values.”
- “Equity, diversity, and inclusion are at the center of the discussion and drive all decisions.
- “We have been on a path to find out how we can build the core values of diversity, equity, and inclusion into all of our activities and operations; as well as model those values as we advance our mission.”
- “Instill the values of DEI into our organizational identity and culture.”

Organizational investment

- “We just made a significant investment in a Chief Equity & Social Justice Officer and are overhauling our curricula, services, mission, values, and fabric of our organization. “

Membership

- “The program prioritizes DEI in the selection process and offers scholarships to support the inclusion of underrepresented perspectives and increase the diversity of the cohort”.
- “We facilitate a diverse open education network: 1080+ members are from 79+ countries”.

Projects

- “DEI is something we deliberately highlight in our annual report.”
- “We are 3 years into our equity work. We developed and launched our Inclusive Innovation model. The districts have identified equity projects.”
- “We will launch our Center for Inclusive Innovation.”
- “Working to bring new voices into open textbooks.”
- “Promoting our DEI working group to a permanent standing committee”.
- “We have sustained a blog post that contributes to our collective growth in this area.”
- “We embody DEI in the expression and implementation of what we do.”
- “We have a dedicated working group focused on the intersection of OER and Equity.”

Professional Development

- “The curriculum includes a module on open and equity. “
- “We build in a certain amount of DEI approaches in our professional development for creation of content.”
- “Our monthly programming prioritizes voices who are newer to the community”

Network Goals

The most common network goals indicated by respondents are:

- *Equity*
- *Sharing / Collaboration / Community of practice*
- *Capacity-building*
- *Advocacy*
- *Research*

Equity is different from the other responses in that Equity is a major goal of open education, while the other responses indicate strategies or ways of working to achieve a goal.

From open-ended responses the equity goal is meant to provide greater access to knowledge by making high quality educational materials and opportunities more broadly available. respondents focus on disadvantaged or underserved students.

- “To advance equity to include anti-racism.”
- “Promote recognition that equity is an essential characteristic of and embedded in high quality OER policy, practice, and research.”
- “Increase equity by developing products that meet the needs of all students, especially disadvantaged students in under-resourced districts and schools, which particularly benefit from lower-cost, high-quality materials, professional development, and implementation support.”
- “Provide more affordable and sustainable higher education options to learners excluded from the formal higher education system.”

The other answers are not technically “goals” per se. Sharing/Collaboration/Community of Practice, Capacity-building, Advocacy, and Research represent ways of working and strategies to facilitate change and development; and are means to achieve equity in education. These are consistent with the Hewlett Foundation’s priorities and sub-strategies for open education.

Sharing / Collaboration / Community of practice

Sharing / Collaboration / Community of practice are ways of working within and across networks to achieve a shared goal. Similarly, community of practice is meant to share knowledge or set practices to achieve goals or improve performance.

- “To share and discover information about OER activities at campuses across North America.”
- “Collaboration with other regional compacts to boost OER equity and use nationally.”
- “To maintain a community of practice among the colleges.”
- “To support the collaboration of state education agency leaders in navigating the selection, curating, and implementing of OER materials in their states.”
- “Provide a community of practice for a diverse network of open educators who share best practices, emerging trends, and collaborate through a variety of online and in-person activities and forums.”
- “Network together open education efforts around the world so they learn from each other.”
- “Plan, organize, convene and host open education events.”

Capacity-building

Capacity building is important because, when it is coupled with the implementation component, it can lead to network success and sustainability. Respondents said capacity- building was a means of increasing open education usage, supporting creation and publication of open education resources by academic institutions, providing professional development for OER advocates, and creating sustainable business models for open education.

- “Increasing the use of high-quality, standards aligned curriculum in classrooms and supporting teachers to use these materials effectively. There is a clear and dedicated focus to supporting districts and schools that include students of color, low-income students.”
- “Help academic institutions create/publish open educational resources.”
- “The main goal is to train and coach individuals and small teams at institutions to become OER advocates and to encourage OER adoption on their campuses. “

- “Create a sustainable business model for full-course, openly licensed curricula that funds the ongoing development and continuous improvement for pre-K-12 math and ELA curricula and aligned professional learning.”

Advocacy

Advocacy is cited as a means to address the larger issue of the digital learning gap, and to raise open education awareness and influence open education policies. Advocacy was also cited as a means to showcase promising practices that support OER implementation and sustainability and move from building capacity to building infrastructure.

- “To advocate for and address closing the digital learning gap.”
- “Open education advocacy and awareness raising.”
- “Build awareness and capacity for OER implementation at the state level.”

Research

Research is cited as a means to share and learn about effective practices across networks. Research is also needed to measure outcomes in terms of equity and access, and to evaluate and share the benefits of OER.

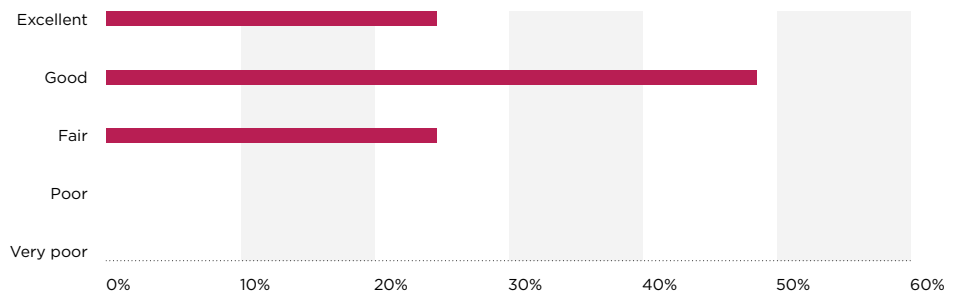
- “To research, design, and scale effective innovations.”
- “Improve research base with a particular focus on equity in outcomes, OER creation, and access to OER by under resourced and minority-serving institutions.”
- “Conduct and share research on benefits of OER implementation.”

It should be noted that most of the areas that are cited as goals by network leaders are more aptly described as strategies. As such, they do not have clear measurable outcomes and are not time bound.

Achieving Priorities and Goals

74 percent of respondents rated their networks as Good or Excellent in terms of achieving their strategic priorities. 26 percent felt their networks were Fair in terms of achieving their strategic priorities. There were no ratings of Poor or Very Poor.

Graph 5. How would you rate your network in terms of achieving your strategic priorities?



Of those who rated their network as Fair in terms of achieving their goals, many cite lack of funding, limited staffing, and their short time in operation as barriers.

Fair

- “Our problem is that we are able to sustain our operations but lack funding necessary to invest in new programs and put them out into the market at the rate that we would like to and that we believe is necessary to help kids and teachers.”
- “This effort is literally just starting, so I’ll give us a neutral grade for now.”
- “Due to lack of staffing the progress to reach all of our constituencies has been fair.”
- “It took several years to build relationships and trust, be willing to share what was and wasn’t working, their challenges.”
- “Not broad enough, we need to do more work to reexamine and build membership and commitment.”

Respondents who rated their networks as Good or Excellent in terms of achieving their goals believe they are making good progress, delivering value, and doing quality work. Some respondents said there were no systemic ways to assess progress or quantify success.

Good

- “Amazing amounts and quality of work occurs in most of the states each year, but there has not been a systematic way to assess progress within and among states.”
- “The network is a significant source of adoptions and the first-year program is in demand. We are working to strengthen our relationships with partners by providing additional support and guidance beyond the first year so that we may solidify an OER culture at their campuses long term.”
- “We continue to be an advocate for closing the digital learning gap through collective voice and local actions... We are amid R&D projects from OER to computational thinking to data readiness. And we are launching the Center for Inclusive Innovation that will house our equity-centered work.”
- “States have made significant progress to date. We are lagging in some areas with data collection so it can be hard to quantify” --but the message that materials matter and the connection that has to form along with PD is penetrating in ways it never has before.”
- “International recognition: 1) Recipient of the 2019 Commonwealth of Learning Award for Excellence in Distance Education Materials 2) International Council for Open and Distance Education Award of Excellence for pioneering an OER-enabled ecosystem for transnational micro-credentialing in higher education.”
- “We are delivering value, but at a smaller scale than hoped.”
- “We’re in the early phases of our Open Education work. Our Advisory Committee, comprised of regional practitioners and OER experts, is helping guide our priorities and serve as a sounding board to realign and prioritize opportunities which best serve the region.”
- “In terms of the resources to impact ratio, this network is extremely successful.”

Excellent

- “Each product being developed by the working groups supports the sustainability of OER from different facets.”
- “The program has proven highly effective at achieving its goal of catalyzing action. The strong network that develops both within each cohort and across cohorts through mentorship relationships is a full articulation of our goals.”
- “I believe we have excellent potential for achieving our priorities - but we are just getting started in 2020. “
- “We have helped more institutions start or advance their open education programs than any other organization. We’ve built a strong community of those programs and they are making permanent change happen in higher education.”

There were no responses that included measurable or quantified evidence of achieving network priorities.

Network Health

70 percent of networks rated their networks’ health as Good or Excellent.

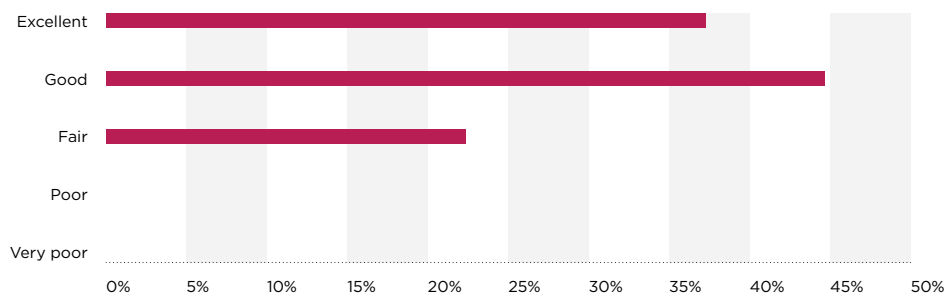
Most respondents equate growth in membership with network health. As expected, COVID-19 was a concern.

- “We’re still assessing the impact on fiscal implications including student enrollments, institutional operations, state budget relative to COVID-19.”
- “We’re just getting established but there is momentum.”
- “We are stable and thriving despite a really crazy year.”
- “The network is strong and growing.”
- “Each year we have many applicants --more than we have the capacity to accept and serve.”
- “We continue to receive new inquiries for membership and expand its current roster.”
- “Our community is growing, engaged, and impactful.”
- “We have recently added five states to advance this work.”

Serving Audiences and Stakeholders

77 percent of respondents rated their networks as Good or Excellent in terms of serving their audience/stakeholders.

Graph 6. How would you rate your network in its ability to serve its audience or stakeholders?



Strong relationships as well as established systems and mechanisms within their networks helped leaders expand reach and best serve stakeholders.

- “We have exceptional ability to reach stakeholders in our respective regions. We have established relationships with governors and their staff, legislators, and education agencies in our regions.”
- “We have set up mechanisms to (a) collect the needs of our community members, (b) gather the community to respond to those needs, and (c) create common resources and services to address those needs.”
- “Our systems were designed for scale since inception. Based entirely on open-source software systems that can be replicated by any organization, we can serve hundreds of thousands of learners without significant increases in the cost of provision.”

Those who rated their efforts as Fair feel constrained by limited resources or feel their efforts should be more intentional and focused to be effective.

- “I need to devote time to shift the mission of the network from the initiative to a broader community devoted to the outcomes of the initiative to broaden interest and participation.”
- “Most of our outreach and service to stakeholders is opportunistic.”

Factors True for Network

Respondents Agree/Strongly Agree that respect and mutual trust, shared values, shared vision and common objectives, and strong leadership are true for their networks. These are factors that are the responsibility of leaders and indicate effective leadership.

Respondents felt less strongly that clear governance and decision-making structures and sufficient funding were true for their networks.

Graph 7. Please rate the degree to which the following factors are true for your network.



● Weighted Average

Summary

Overall, leaders characterize their networks in positive, optimistic terms. They believe their networks are growing and healthy, and the network goals and primary activities are aligned with the Hewlett Foundation’s priorities and strategies for open education. For the most part, they feel they are achieving their goals, and effectively serving stakeholders.

Overwhelmingly, foundations are the primary source of funding for networks. Throughout the survey, respondents indicate that there is insufficient funding or inadequate funding streams to achieve open education goals and build and sustain networks and the field. A priority and a sub-strategy of the Hewlett Foundation is to expand sources of funding in the field. Efforts by the networks to attract additional funding or build self-sustaining business models can be strengthened.

Responses varied on whether network activities specifically advance diversity, equity, and inclusion. Leaders cite a range of efforts, from the mission-centric to the more tactical.

Only about one-third of respondents felt their network’s activities were doing a great deal to specifically advance diversity, equity, and inclusion while just over half of those surveyed felt their networks were doing little to moderate work around this. Clearly there is opportunity to do more here.

The main activities of networks are sharing information and collaboration, professional development, and advocacy. These activities demonstrate the degree to which leaders see their network as a catalyst, connector, and amplifier of their members’ work.

The most common network goals indicated by respondents are equity, collaboration, capacity building, advocacy, and research. These are consistent with the Hewlett Foundation’s priorities and sub-strategies for the open education field.

Shared vision and values are the cornerstones of successful organizations and strong networks. They are especially important for newer networks in a field, like open education, that seeks to both transform and innovate.

The network leaders in this survey feel they have done well in creating and communicating a vision and values that their members want to follow; and in fostering a culture of mutual respect and trust. Leaders are less confident about the governance and management of their networks, and sufficient funding.

While most respondents recognize their network's accomplishments, they also lament limited staff, funding, and resources and believe they could achieve more, at scale, more quickly, with greater support.

PART 2: THE OPEN EDUCATION FIELD

Field building is coordinating the efforts of multiple organizations and individuals around a common goal and creating the conditions necessary for them to succeed. The Hewlett Foundation's field-building efforts include "lines of work focused on increasing grantee collaboration; promoting diversity, equity, and inclusion; building research capacity; and attracting new funding for open education."

The Open Education Field Goals

respondents said the broad goals for the open education field are:

- *Access and Equity: access to effective open educational resources, advancing education as a common good, providing equitable access to diverse populations, tailoring to the needs of different students.*
- *Advocacy: developing and advocating for open education priorities and practices, promoting policies to sustain open educational practices.*
- *Scale and Growth: Widespread implementation of OER materials, support for the creation, curation, and implementation of open education, growing use of open educational resources and practices at the institutional, system, and state level.*
- *Sustainability: Developing a common infrastructure to support the operation of open education, sustaining open education efforts at institutions, systems, and states.*

Access and Equity are concepts against which all services should be measured. They are reflected in how decisions are made about who is eligible for a service, how resources are allocated, and how the needs of people from diverse backgrounds are met.

Access and Equity

- "Creating a world in which everyone has universal access to effective open education resources, meaningful learning opportunities through open practices, all supported by policies that provide political cover and funding for both."
- "Open Education is primarily about advancing education as a common good."
- "To provide equitable access to diverse populations and students of low socioeconomic status"
- "To make education accessible to all, and easier to tailor to the needs of different students."

Advocacy

- “To develop and advocate for open education priorities and policies.”
- “Promote policies that will sustain open educational practices.”

Scale and Growth

- “The widespread implementation of OER materials for effective teaching and learning, including support for the creation, curation, and implementation of OER.”
- “The broad goals are to sustain and grow open education at our institutions, systems, statewide governing bodies and nationally.”

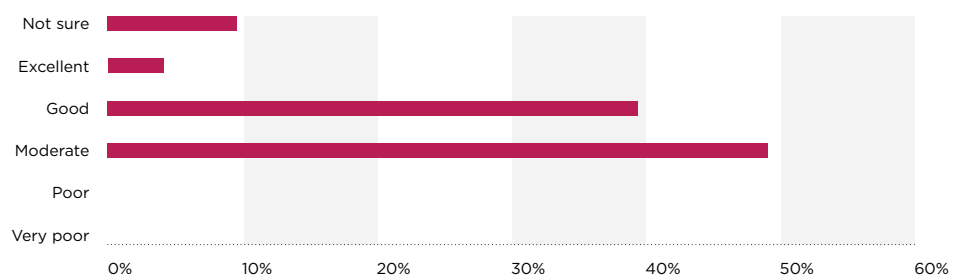
Sustainability

- “We must now focus on the sustainability of those OER efforts and offer new opportunities to expand OER in critical discipline areas.
- “We must develop a common infrastructure to support the entire open operation.”

Achieving the Field’s Goals

The largest proportion of respondents rated the field as Moderate/Fair (47 percent) in achieving its goals. 39 percent rated the field as Good, and just 4 percent felt the field was Excellent. From open-ended comments, there is a sense that progress has been made, but much work needs to be done to grow, scale, and sustain the open education field. Many respondents indicate that divisions in philosophy and different factions in the field present barriers to achieving the field’s goals. There are also many pointed comments about the small number of committed and passionate people who are responsible for the field’s achievements.

Graph 8. How would you rate the open education field in terms of achieving those goals?



- “Progress against all those goals has been achieved by a relatively small group of dedicated people, small amounts of investment (in the context of education budgets overall). “
- “While the community has developed wonderful OER assets, the community at large is still relatively siloed and segmented by region, network, and membership. We still lack the supporting infrastructure to enable widespread adoption and sustainability.”
- “There is a split between those deeply engaged in this field and the

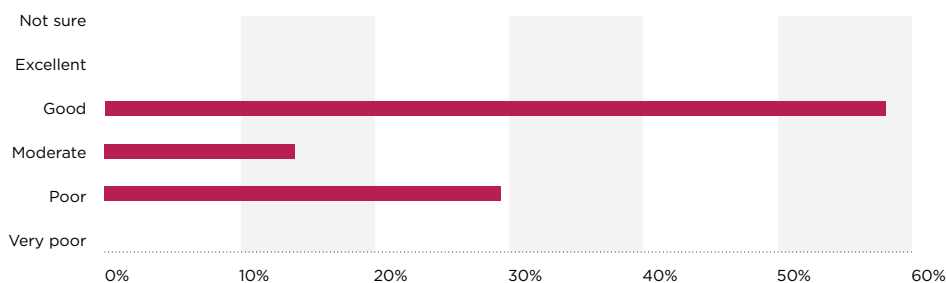
majority of educators that are still working towards a fundamental understanding of this work.”

- “OER evangelists can do a better job of recognizing there is still a place for licensed materials, especially dynamic, digital tools and resources that require intense research and development; and technology tools and resources that are very costly.”
- “OER has made significant progress, but at the state and institutional level is still not viewed as a mainstream and widely-accepted practice.”
- “We’re running on the fumes of committed people.”
- “As someone who has been involved with open education since 2003, I think it is incredible what the open education field has been able to achieve.”
- “The open education field often gets divided into factions: (1) A difference in goals: We’re not all working toward a goal of education as a common good with equitable outcomes for all students. (2) A difference in strategy: Some focus on schools, while others believe the solution must live beyond schools. (3) Passion vs. strategy: Some in the field are focused on the end goal with a passionate commitment, but not on the strategies to get there. Their passion is important, but it can turn to judgment of those who are working on the ground.”

When the data are disaggregated between higher education respondents and K-12 respondents, there were differences in answers to this question. Fifty-seven percent of K-12 respondents rated the field as Good, 14% Moderate, and 28% Poor in terms of achieving the goals referenced in the prior question.

The two respondents who rated the field as Poor, noted a lack of diverse and inclusive content as one reason, and that it was time to move beyond the resources themselves to focus on how the resources are used and find ways to support that use so that they are truly innovative.

Graph 9. K-12 Respondents Only: How would you rate the open education field in terms of achieving those goals?



In comparison to Part 1 of the survey, respondents rated their own networks more highly than the field in terms of achieving goals.

	Achieving Goals		
	Fair/Moderate	Good	Excellent
Network	26%	48%	26%
Field	48%	39%	4%

Factors True for the Field

When the data were disaggregated between higher education respondents and K-12 respondents, there were differences in answers to this question.

The factors that topped the list as true for the open education field from the higher education network leaders included: influential leaders and exemplary organizations, exemplary models/resources, and a community of researchers to study and advance practice. As leaders, these are factors for which they have direct responsibility and strong influence. Higher education respondents said less prevalent factors in the field are codified practices, broad based support from major constituencies, and organized funding streams.

For K-12, the most prominent factors for the field were a community aligned around a common purpose and a set of core values and credible evidence that practice achieves desired outcomes.

K-12 respondents agreed that less prevalent factors in the field are codified standards of practice and organized funding streams, but also rated lower vehicles to collect, analyze, debate, and disseminate knowledge. This may be related to the fact that most national organizations serving as disseminators and connectors are primarily serving a higher education audience, and that these K-12 regional networks are largely without national networks.

Interestingly, K-12 respondents also rated lower the two top factors for higher education respondents: influential leaders and exemplary organizations and exemplary models/resources. This may be an indication that the K-12 sector is not as far along in terms of developing a community/field around OER.

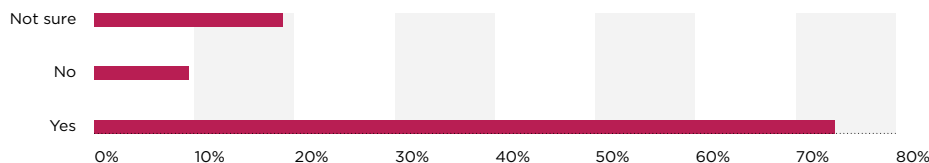
Graph 10. Please rate your agreement with how well the following factors reflect the open education field.



Gaps in Audiences and Stakeholders

Nearly three-fourths of respondents indicate there are still gaps in terms of audience/stakeholders effectively served by the open education field. Less than 10 percent felt there were no gaps.

Graph 11. Do you think there are gaps in terms of audience/stakeholders effectively served by the open education field?



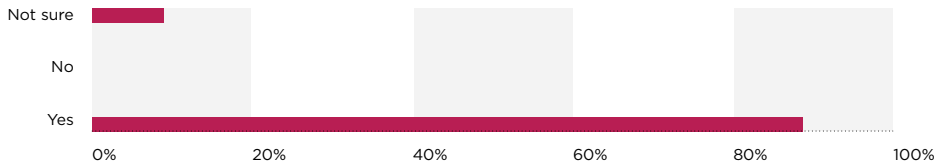
Audiences that are cited as not being well served by the field include minority serving institutions and underserved students, higher education faculty and administrators, and senior leaders and policymakers. This is a broad list of key stakeholders.

- “The field serves those interested and focused on OER well, but more must be done to generate the same level of interest among institutional leadership and state/system policymakers.”
- “The majority of OER still focus on lower-level courses and programs. We must support the expansion of OER beyond this segment.”
- “Beyond the traditional OER stakeholders, we must bring other areas of the academy into the conversation, including admissions, advising, financial aid, and student support.”
- “In higher education, there are missed opportunities in audiences the field connects with- faculty practitioners, college admins, and policymakers.”
- “(We need) a directory of various organizations and networks serving various audiences so leaders know where to point stakeholders based on their needs.”
- “I believe students and their families are still unclear about what open education is”.
- “I’ve worked to include Tribal Colleges (and other minority-serving institutions) in open education.”
- “There are gaps for students with disabilities in terms of accessibility. There is a need for more diversity in materials to reflect the populations we serve.”
- “Not all audiences are being served equally. I feel we can do more for underserved.”
- “Definitely need more support from senior leaders and legislators.”
- “CTE fields, private institutions, rural institutions.”

Unmet Needs

87 percent of respondents indicate there are unmet needs in the open education field.

Graph 12. Do you think there are unmet needs in the open education field?



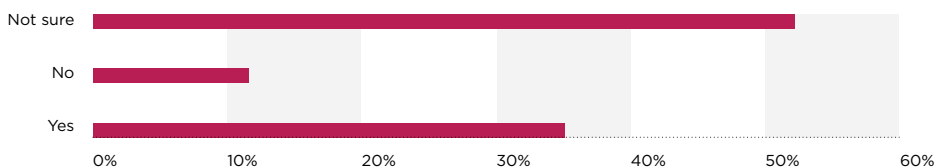
Responses varied greatly and covered many areas, from the need for evidence of OER effectiveness and more supportive policies, to expanded content, stronger marketing, and OER- solutions during COVID-19. As one respondent said, “Every single open education goal area has unmet needs.”

- “Supportive policy environment to scale OER.”
- “The ability to identify and share vetted resources across states.”
- “Info and analyses to understand: What are KPIs that drive the people with big budgets? What is the data that shows that OER drives those KPIs in the right direction? What is the ROI of OER compared with other methods to drive those KPIs?”
- “Strategic and cohesive messaging for the different layers of stakeholders.”
- “Beyond Europe and North America efforts lag.”
- “To expand beyond lower-level courses and ensure equitable and accessible content.”
- “Need for national, state, and local policies, funding, training, and research.”
- “OER solutions to tackle COVID-19: Higher education focused on individual organizational needs while pivoting for online learning instead of collaborating using OER-enable solutions.”

The Need for New Networks

Most respondents (52 percent) are Not Sure if new networks are needed in the field; 35 percent said Yes new networks are needed, while just over 10 percent felt that no new networks are needed to grow and sustain the field.

Graph 13. Are new networks needed to grow and sustain the open education field?



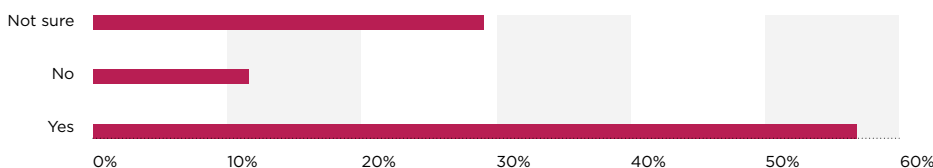
Respondents who were unsure of whether new networks were needed said it might be better to consolidate or strengthen existing networks.

Respondents who said new networks are needed to sustain and grow the field believe there are opportunities for new regional cohorts of faculty, new networks of faculty of color to develop OER, more networks dedicated to scaling efforts, and a new network of university business offices to analyze impact of OER on KPIs and ROI.

- “Two underdeveloped areas are intentionally focusing on incorporating faculty of color in the development of OER and assisting under resourced institutions in scaling OER.”
- “Regional cohorts of faculty who are incentivized and supported to come together to create and refine open content and share best practices.”
- “Some organization of university Business Offices analyzing the impact of OER on (financial) KPIs.”
- “Yes, new networks, but not redundant networks to the ones that already exist.”
- “There is a need for new networks to meet the scale and scope of effort associated with fulfilling open education goals and purpose.”
- “We need existing networks to collaborate and partner together more and potentially consolidate from separate autonomous networks into larger cohesive networks.”

When the data are disaggregated between higher education respondents and K-12 respondents, there were differences in answers to this question. K-12 respondents were more likely to say Yes (57%) and Not Sure (29%) if new networks were needed. Those who indicated new networks were needed cited a need for standards and guidance across and between local networks, which would provide the support they needed to thrive. Those that said Not Sure, noted that perhaps it would be a more effective strategy to connect with existing “mainstream educator” networks, as opposed to creating new networks just for open education.

Graph 14. K-12 Respondents Only: Are new networks needed to grow and sustain the open education field?



Summary

Respondents said the main goals of the Open Education field are Access and Equity, Advocacy, Scale and Growth, and Sustainability.

Respondents in higher education feel the field has exemplary leadership, a strong community aligned around common purpose and shared vision and values, and excellent resources and models. These factors are particularly important in a developing field that requires transformation and broad systemic change to be successful. K-12 respondents felt that the field's top factors included an aligned community, credible evidence, and available resources to support implementation. Respondents from both sectors were less likely to feel there were codified practices, broad support from major constituencies, and sufficient organized funding in the field. These factors are critical to sustaining open education.

The largest percentage of respondents rated the field as Moderate in meeting its goals. Barriers to achieving the field's goals are the different philosophies and factions in the field that take different approaches to developing and sustaining the field. Some K-12 respondents indicated that the field was doing a poor job of meeting its goals, and cited reasons such as a lack of inclusive and diverse resources and not enough focus on how resources are being used pedagogically.

Overwhelmingly, respondents feel that there are gaps in serving stakeholders and audiences, and that there are still unmet needs in the field. These gaps and needs center on reaching faculty, minority-serving institutions, and underserved students, expanded content and stronger state policies supporting open education.

While most respondents were not sure if new networks were needed but felt existing networks could be consolidated or strengthened. Those who felt new networks were needed point to new regional cohorts of faculty, new networks of faculty of color to develop OER, networks to connect and support local networks, and more networks dedicated to scaling efforts and to analyzing the impact of OER on KPIs and ROI.

II.

Regional Network Leaders Survey Analysis

In September-October 2020 open education leaders in states, provinces, and districts in the United States and Canada were administered a web-based survey to examine the perceptions and beliefs of open education network leaders about what the field should focus on to be more effective; and where they see gaps in the field that need to be filled in terms of audiences served and network participants. Forty-six people were sent the survey and twenty-nine responded for a response rate of 63 percent.

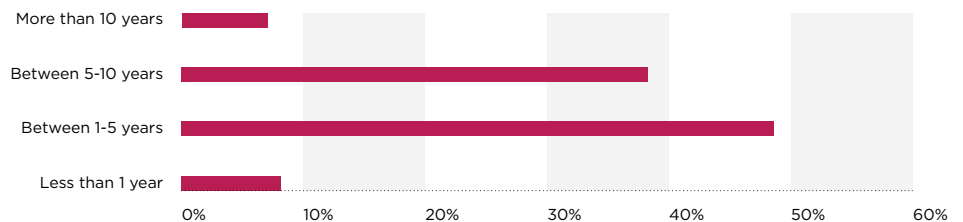
DEMOGRAPHICS

Regional networks who participated in the survey include open education leaders of state university systems, state community college systems, open education leaders for county public schools, and open education leaders of state departments of education, higher education commissions, and state superintendent's offices.

- Alabama Commission on Higher Education
- Barton Community College (Kansas)
- BCcampus
- Brooklyn Lab Charter School
- California State University, Office of the Chancellor
- Campus Manitoba
- Chesterfield County Public Schools
- City University of New York
- Colorado Community College System
- Colorado Department of Higher Education
- Community College System of New Hampshire
- Connecticut State Colleges & Universities
- CT Commission for Educational Technology
- DVUSD
- eCampus Ontario
- Liberty Public Schools
- Mass. Department of Higher Education
- Open Oregon Educational Resources
- SUNY OER Services
- SUNY System Admin
- Texas A&M University System
- University of Colorado Boulder
- University of Texas System
- University of Wisconsin System
- University System of Georgia
- University System of Maryland
- Virginia Department of Education: #GoOpenVA
- Washington Office of Superintendent of Public Instruction
- Washington State Board for Community and Technical Colleges

48 percent of respondents served in their current role for 1-5 years. 38 percent have been in their current role for 5-10 years.

Graph 15. How long have you served in your current role?



REGIONAL PERCEPTIONS OF THE OPEN EDUCATION FIELD

The Open Education Field Goals

Respondents representing Regional Networks said the primary goals of open education are Access and Equity, Student Success, Affordability, and Creation and Adoption of open education Content and Resources. Affordability and open education content and materials are a means to access and equity, and student success.

“To expand adoption, adaptation and creation of OER to make P20 education more equitable and just in terms of affordability, access, participation, completion.”

Access and Equity

- “To promote the use of openly licensed resource materials in order to increase access to education.”
- “To further democratize and expand access to open education, including open-source software, data, science, pedagogy, and educational resources.”
- “To increase educational equity, reduce the cost of attendance in higher education...”
- “To Improve equity to education by providing no/low-cost instructional materials to students which should improve retention and completion of individual educational goals. “

Student Success

- “Impact/improve student success/achievement.”
- “Improving the success rate (broadly defined) of students enrolled in for-credit courses or programs.”
- “To increase student success for marginalized groups...”
- “To improve retention and completion of individual educational goals.”

Affordability

- “To make college more affordable and accessible to all citizens.”
- “To increase student performance, advance equity, and decrease higher education costs.”
- Decreasing the cost of accessing information
- Reduce the cost of attendance in higher education
- To Improve equity to education by providing no/low-cost instructional materials to students
- To assist in closing equity gaps, reduce cost of education,

Open Education Content and Materials Creation and Adoption

- “To expand adoption, adaptation and creation of OER to make P20 education more equitable and just in terms of affordability, access, participation, completion.”
- “To support a change in the way teaching and learning occur by

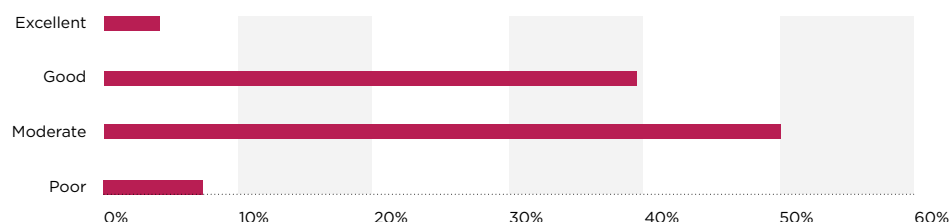
providing resources that can be easily adapted to the needs of individual students (or groups of students).”

- “To find a solid connection for OER in curriculum and a clearer understanding of the value and energy around resources that are not driven by single textbook perspective. The use of teacher materials and student materials in the OER world.”
- “Facilitate new forms of pedagogy using remixing and revising.”
- “To create current content; create content free of commercial interests; provide access to material that can be adaptive for the specific educational circumstances; affordability -student/institution- and a more sustainable model for educational materials.”
- “To position OER as the “first option” for faculty when adopting instructional materials.”
- “To provide quality sources of modular and portable digital content - to develop a culture of contribution in addition to consumption.”

Achieving the Field's Goals

Many respondents (50 percent) rated the open education field as Moderate in terms of achieving its goals. 39 percent felt the field is Good in achieving goals.

Graph 16. How would you rate the open education field in terms of achieving those goals?



For those who rated the field Good in terms of achieving goals, there is a sense of momentum and progress in the field; however, many respondents qualified their praise by also indicating an area in need of improvement.

Good

- “I think open education as a whole has made large leaps over the last few years, but with still a long way to go.”
- “There are pockets of excellence in pedagogy and support in our state, but these are not inherently part of the K - 12 or higher education culture.”
- “The field is still developing. It’s currently got more potential than results.”
- “I feel that Open Education has better networks and communities of practice that are unified in working towards common goals, despite expected disagreements and power plays.”
- “The more awareness there is around OER, the more teachers and students (aka schools and districts) hack the edges with more and more usage.”
- “Huge level of development in all areas but still much work to go.”

Those who rated the open education field's achievement of goals as Moderate said there is need for improvement in many areas. They cited the lack of faculty adoption due to current tenure and promotion policies; the lack of understanding and the skepticism about the quality of open education from teachers and higher education faculty; and the need to more broadly engage people who are end users (faculty) and who can change policies (high level administrators) to achieve open education goals. Others commented on the focus on access and affordability at the expense of student success and creative pedagogy.

Moderate

- “There are issues, subjects, and silos that are still not being addressed; definitions are not clearly established in some cases; and, therefore, research can be difficult.”
- “Many faculty are still unaware of the potential of OER (see the Babson Survey), many have not yet adopted or adapted it, and most have not engaged with creating new resources as it is not recognized as part of the T&P process.”
- “There is developing interest and recognition; ‘resistance’ seems to be around support for the change at the institutional level and recognition of the content for creator’s professional development (tenure).”
- “When the larger Open Education field got started around 2012, cost was the main factor. In 2020, it’s far more about educational equity, of which cost is a part, but not the whole thing.”
- “OER is not well understood. Traditional educators hold skepticism because they are not paying for it. Higher ed (replacement to a textbook) and K-12 (modular, portable learning objects) have different objectives.”
- “While many teachers support sharing, they are stifled by fears of copyright, accessibility considerations, reluctance to have to format and template, reluctance to have to attach metadata such as standards etc. So many places to share content. Why pick one over another or duplicate effort?”
- “We propose great ideas, but we need to meet those who are the actual adopters or implementers of open education at their level of challenges with their change management needs.”
- “Good efforts and well meaning. Seems the people who can move the needle (faculty at the grass roots and upper-level administrators who can divert resources) are not broadly engaged. Mostly it is middle folks who don’t control classes and/or don’t have the resources.”
- “We are having a big impact on textbook affordability that is changing industry practices and raising awareness about the problem. However, the field of open ed can do much more to make the connections between OER, creative pedagogy, and overall student success. We need to integrate with other strategic initiatives otherwise open ed will have been a fad.”
- “I think we have definitely seen a rise of affordable and accessible learning materials as the inequities of education have been heightened due to Covid-19. I believe there is always room for improvement because we have not achieved FULL accessibility, inclusive, or affordability of learning materials.”

- “Too much focus on access and affordability has resulted in a fervor within the community to want to always be on the attack. We can’t focus strictly on destroying publishers because they play a critical in education. We must learn to work with people who we do not always agree with. “
- “There is also little acceptance to the fact that adopting OER does not equal success. Learning is complicated. OER is not magic. Faculty course preparation is more important than most understand. This research is critical for us to understand.”

Respondents said barriers to achieving the field’s goals include a lack of diverse and inclusive content; a need to move beyond focusing on resources to how resources are used; and too much emphasis on “destroying” traditional publishers.

Barriers to Success

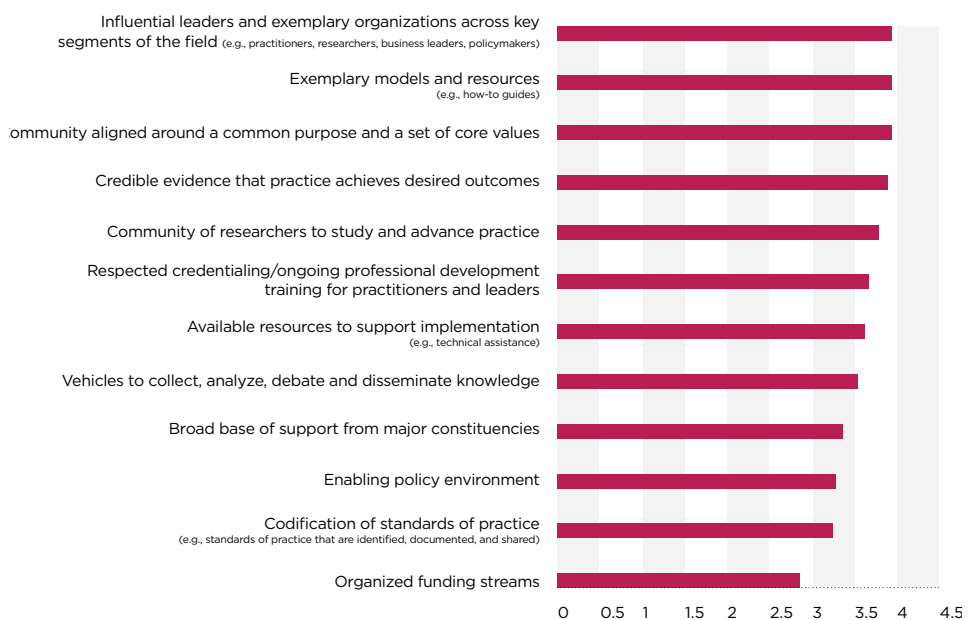
- “We do not have diverse and inclusive content.”
- “The emphasis has been on resources, which was the first step. It is now time to move beyond this to focus on how the resources are used and find ways to support that use so that they are truly innovative.”
- “The open education field is often, to its detriment of fulfilling the broad goals listed above, hyper-focused on destroying traditional publishers.”

Factors True for the Field

The most highly rated factors in terms of reflecting the open education field are influential leaders and exemplary organizations, exemplary models and resources, and a community aligned around a common purpose and set of core values.

Rated lowest of all factors reflecting the field is organized funding streams.

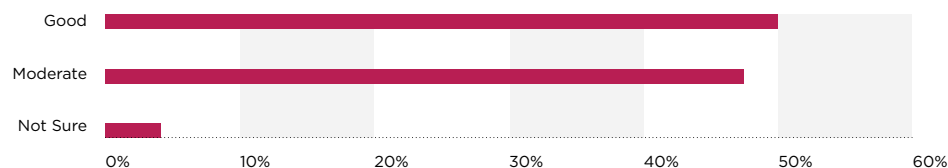
Graph 17. Please rate your agreement with how well the following factors reflect the open education field.



Effectiveness Serving Stakeholders

Respondents rated the field as Moderate (46 percent) and Good (50 percent) in effectively serving stakeholders.

Graph 18. How would you rate open education field's effectiveness in serving its stakeholders?



Those who said the field is Good at effectively serving stakeholders cited its great community of practice, content and support at the national level, and support of advocacy groups.

Good

- “Great community of practice, very welcoming to new folks looking to engage and very helpful.”
- “The content and support locally and nationally are great but tend to be siloed within advocacy groups.”
- “Depending on the stakeholder, the field has done a wonderful job.”
- “We do a fantastic job supporting OER advocates and agents like the US PIRG have solidly supported students.”
- “We do a decent job of supporting faculty but are sometimes guilty of shaming or talking down to those not embracing OER.”
- “I think there is still work to do with institutional leadership and supporting departments like Advising and Admissions.”

Those who rated the field's effectiveness in achieving stakeholders as Moderate said there is a need to broaden support and move from the fringe to the mainstream of education; and to focus more on practical approaches and support. This group also stated the need to do more around the usability of OER – the practices, pedagogy and PD that need to accompany the content.

Moderate

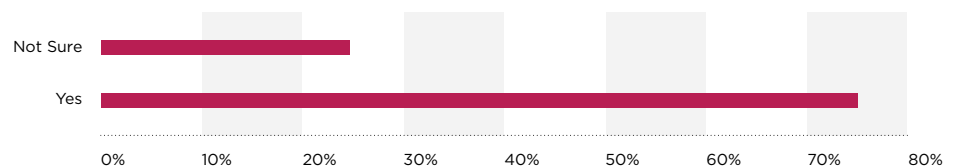
- “Some disciplines lack quality open educational materials.”
- “More work must be done to help educators see the value in adopting open educational materials and principles.”
- “I do not think we are doing enough around usability of OER. Not just the content itself but the practices, pedagogy and PD that need to accompany that.”
- “There remains room to tell and share the story of how open education and open education practices provide a return on investment of academic institutions and the public (tax-payers).”

- “The group that is engaged at this point has the ability to dedicate to the work. Those who are on the fringes are distracted by the day-to-day priorities and ease of relying on traditional resources to ease the overload.”
- “Not enough practical support. Far too much evangelism and absolutism (you’re not “open” enough). Guilty of shaming or talking down to those not embracing OER.”
- “I think there is still work to do with institutional leadership and supporting departments like Advising and Admissions.”

Gaps in Audiences and Stakeholders

Overwhelmingly, respondents (75 percent) indicated there are gaps in terms of audience/stakeholders effectively served by the open education field.

Graph 19. Do you think there are gaps in terms of audience/stakeholders effectively served by the open education field?



Respondents said there is a lack of awareness and understanding of open education which varies greatly across institutions. Also, there is a sense that open education remains on the fringe, outside the mainstream. Gaps in both resources & support as they relate to funding, implementation, training and more, were also factors cited by respondents.

Interest and Awareness

- “The lack of awareness of OER’s potential and many common misunderstandings and myths.”
- “Knowledge, acceptance, is varied at institutions, departments, individuals.”
- “You need to be engaged in open education in order to benefit fully from open education - there’s no “trust us, it’s better” to it, open education is human-centric and requires time and energy.”
- “Too few people know about OER. Too few administrators are onboard. Too many publishers are trying to co-opt or confuse the OER movement.”

Gaps in the types of audiences who are effectively served are said to be students, faculty, and diverse institutions. Respondents felt students of color are not as effectively served. Lack of diversity and inclusiveness is an issue in open education content and resources, in student and faculty populations served, and in the makeup of advocates and leaders within the field.

Audiences

- Those existing outsiders of higher education often don't recognize or view themselves as being impacted, having a role, etc. This is especially true with public libraries.
- The audience/stakeholders in open education should rank as follows: 1) students 2) teachers 3) everyone else. The "field" was not created to serve its stakeholder but was borne out of necessity and is applied by different means in different contexts. For example, what does open education in N. American mean when compared to definitions of open education in Sweden, South Africa, Brazil and China."
- "I think that we are effective in serving our stakeholders, but there are still gaps. Partially this is because of OER initiatives and champions being under-resourced which prevents them from being as ambitious as they would like to be. Bookstore managers are sometimes not included in a holistic way that considers the impact on their operations. Also, the field does not currently represent the diversity of our institutions and students."
- "We need to be concentrating much more on how we serve BIPOC students. We need to engage BIPOC folks into the conversation and ask the critical and uncomfortable questions. We need to acknowledge that our Open Education is largely a white dominant, colonial structure based on copyright systems that are colonial in nature."
- "In our instance, we are serving teachers and other educators. Our gap is students. It is becoming clear that we should be thinking about how to serve older K-12 students who can then control their own pathways in education."

Respondents also identified unmet needs in the areas of ELL, special education, rural communities, and other resources and support.

Resources/Support

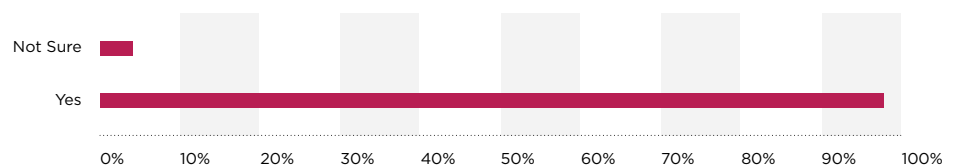
- "ELL, special education, intersectional identity- SEL coupled with academics."
- "Large K12 divisions have essential human resources and can be contributors but lack incentive to expand beyond respective divisions. Small K12 divisions lack human resources or scalability."
- "The gaps are the implementation, support, documentation, resources aspects in the adoption and awareness process."
- "There is a gap--and many of us are working to close it within our spheres of influence--between the practitioners and the upper-level administrators, leaders and policy-makers who set strategic direction and priorities, and control purse strings to implement what is needed."
- "If OER is to be sustained, it must not be a fringe effort. It must be part of the standard curriculum review; part of the tenure & promotion process; part of the marketing and admission process; and every other aspect of the higher education conversation."
- "One area that needs additional resources is advocacy support - some who embrace OER may not have experience in advocacy or leading initiatives and may need tools and support to be successful within their campus setting."
- "We should try and find organizations that can teach us how to be better

stewards of educational materials. A free resource can still offend and hurt. There are organizations that could help us be more consistent with DEI efforts. And this moment is crucial, and we will make mistakes as people, but if we proceed with patience, tolerance, and love we actually may grow.”

Unmet Needs

There was almost unanimous (96 percent) agreement among respondents that there are unmet needs in the open education field. The unmet needs fall into three areas: resources, research, and advocacy/awareness.

Graph 20. Do you think there are unmet needs in the open education field?



In terms of resources, respondents said resources are needed for new librarians, faculty, and advocates in the field, and for course development, specifically for highly technical subject areas and fields. Needs remain for greater investment in capacity building and for high quality resources.

Resources

- “Unmet needs include educating faculty about what open education resources and pedagogy are and how they can be leveraged; funding for creation, adaptation, and incentive for adoption of OER/OEP for courses; improve discovery of existing OER and incentives for sharing educational resources and making them fully open (the 5 Rs).”
- “There’s so much work that needs to be done here. Science, Math, Nursing, and other highly technical fields don’t have enough high-quality materials.”
- “Not enough investment has been made institutionally to develop high-quality materials. People need to be given the resources to develop the materials.”
- “In order to build capacity and scale the extraordinary practice and progress in the field of Open, far more resources are needed, above all financial but also commitment of staff with time to advance the essential practice, policy changes, data analysis underway.”
- “Support for holistic assessment is one need: there is powerful emerging evidence for the power of OER, for example, to improve student success and deeper learning, as well as to generate compelling ROI for students and educational institutions.”
- “Money, people and time are needed to conduct assessment and build the evidence.”
- “Plenty of courses lack quality open resources. Lack of financial support

for conversion of courses and programs to an open environment. And the broader issue of open education: really this is cost shifting. Nothing is free. Who is picking up the tab?”

Respondents said there are unmet needs in research in terms of evidence tied to student success, learning outcomes for first generation and minority students, and ROI, and for effective pedagogy, and implementation practices.

Research

- “Scholarship as to the effectiveness of OER on student learning outcomes.”
- “I would like to see more research conducted to determine if open ed has a positive impact on first generation and minority students.”
- “Rigorous standards for research related to student success and the use of OER (i.e., openly sharing data).”
- “Need more empirical research on how OER can impact pedagogy and student learning outcomes.”
- “Empirical research is poor at best. Research in open education may prove not all implementation efforts were done well. Could also prove not all disciplines are going to have successful implementations. That information would be gold. Think about how much better education could be, let alone open education.”
- “We focus too much on open and not enough on education. Open doesn’t always equal good.”

In open education advocacy and efforts to increase awareness, there are needs for more mainstream champions and advocates outside the field, and for simpler, more compelling narratives or communication, and common definitions used in the field.

Awareness and Advocacy

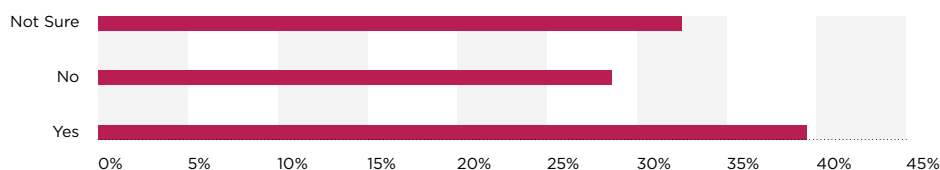
- “I think we need mainstream champions and a better, simpler narrative connecting OER to current teaching and learning best practices. Storytelling is key.”
- “Common advocacy with connections to smaller groups of need.”
- “Mostly within definitions of terminology and variance in data methods. Some use the term Open Education to mean “free materials” or to define “inclusive teaching methodologies”. Is it both? One or the other? There also isn’t a formal leadership (more of a decentralized leadership) which can both be a benefit and a challenge.”
- “Tenure - I think recognition of open education in the tenure process is the biggest deterrent for having this go mainstream and being the default.”

The Need for New Networks

In response to the question if new networks are needed in the open education field, responses were mixed. 39 percent of respondents said Yes, 29 percent said No, and 32 percent said they were Unsure about the need for new networks in the field.

Respondents who said there is a need, identified new networks of and for the following populations and groups:

Graph 21. Are new networks needed to grow and sustain the open education field?



- Underserved and marginalized stakeholder groups
- Education researchers
- Education administrators
- Partner organizations, beyond the open education field, with global reach.

Respondents also said more and new local networks with greater supports are useful.

Yes

- “We need a better forum for discussion and problem -solving, heavily moderated with a core set of values to include and invite all voices in good faith. If that’s in-person, great (pandemics notwithstanding). If that’s online, even better, as that’s more accessible for more people.”
- “For underserved stakeholder groups (i.e., Global South).”
- “Definitely... if we continue to silo open education, we create an exclusive community that does not push its boundaries or its learning.”
- “I think we need to network with marginalized groups more- how can open and assist in enhancing student learning in prisons or on reservations?”
- “The usefulness of local networks cannot be overstated. The more of these we have, the more effective they can be. However, having standards and guidance, as well as funding, would provide enough support that these local networks could thrive.”
- “We need a robust educational research network, that eventually just focuses on educational research. We need a network of administrators too.”
- “We also need partnerships beyond the open education community. If we truly want to have a global reach, we need more organizations involved that have a global reach. Some of these organizations may be cast aside as not pure enough to be part of the open education space. That is a missed opportunity on our part. There is value in building bridges. There is none in building walls.”

Respondents who said no new networks are needed felt there are already many networks that could address the issues and needs in the field and that new networks may “further dilute the field”. The existing networks can do more and can bring in more diverse members; the leadership can evolve to represent sectors or audiences within the field.

No

- “I don’t think we should further dilute the field but do more with the folks we have and bring in more (especially more diverse members) to the existing organizations.”

- “There are plenty of networks involved, rather a couple leaders need to evolve - these leaders need to represent different parties - there needs to be a Higher Ed one (from the schools and faculty) then maybe 1-2 from non-profits or government focused groups.”
- “There are plenty of networks. Committed state backed efforts are needed.”
- “I believe there are currently, certainly in the US and Canada, strong and diverse networks. They need to be supported, perhaps brought together under the broad umbrella of the collective impact change model to more fully recognize all that is happening, leverage commonalities, and honor distinctiveness.”
- “New networks, no. Enhanced and more sophisticated networks, yes. Continue building with what exists, but remember open education’s role in the larger context, specifically within the complex, tumultuous systems of higher education and education as a business.”
- “I’m concerned that we already have too many different networks working on similar initiatives.”

Respondents who were unsure felt there are enough current networks but that they might expand their scope and engage more members. Respondents said there were overlapping efforts and leaders may be over extended.

Not Sure

- “I would like to see greater support by the US DOE for open ed in higher education.”
- “I think getting mainstream educators on board is key - tie to existing best practices, not an ‘add-on’.”
- “There are a lot of collaborative networks doing somewhat overlapping work. The nation is well represented. Not sure we need more networks but possibly expand their scope.”
- “If the new networks give new opportunities to those who haven’t had a chance to engage, then those networks could be helpful. With the current networks, there are key individuals who are participating in multiple efforts. which may limit their full engagement in any one effort. We may be overusing some individuals while underutilizing others.”

Summary

Regional Network Leaders said the primary goals of open education are access and equity, student success, affordability, and creation and adoption of open education content and resources.

There is a sense of momentum and progress in the field; however, there are many areas in need of improvement. Respondents cited the lack of faculty adoption due to current tenure and promotion policies; lack of understanding and the skepticism about the quality of open education from teachers and higher education faculty; and the need to engage faculty and high-level administrators more broadly to achieve open education goals.

Three-fourths of the respondents indicated that there are gaps in stakeholders effectively served by the open education field. To serve the stakeholders more effectively in the field there needs to be broader support and a move from the fringe to the mainstream of education. Regional Network Leaders emphasize the need for more practical approaches and support.

II. Regional Network Leaders Survey Analysis

There was almost unanimous agreement that there are unmet needs in the open education field. The unmet needs fall into three areas: resources, research, and advocacy/awareness.

There are existing networks in the field that could expand and evolve to address the many issues and needs of the field. However, new networks are needed for more diverse institutions and marginalized stakeholder groups, as well as for broader research and to establish partnerships beyond the open education community.

III.

HBCU Network Survey

As a large portion of HBCU leaders of open education networks responded to the Regional Network survey of the field, the data has been disaggregated to examine their unique perspectives. Thirteen open education leaders from Historically Black Colleges and Universities (HBCUs) completed the survey. The survey focused on the Open Education field and perspectives and perceptions from these institutions.

DEMOGRAPHICS

Thirteen representatives of HBCUs responded to the survey; eleven represent 4-year institutions and two represent community colleges.

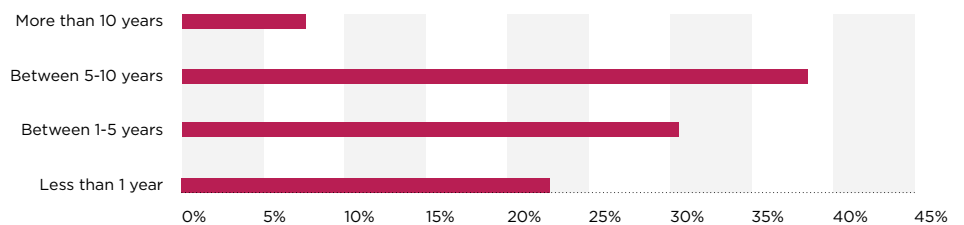
- Morehouse College
- Xavier University of Louisiana
- Central State University
- Lawson State Community College
- Dillard University
- Fisk University
- Motlow State Community College
- Arkansas Baptist College
- Southern University System
- Central State University
- Bethune Cookman
- Southern University at Shreveport
- Tennessee State University

Respondents' roles at their institutions included faculty, administrators, and managers or directors of centers and special programs.

- Associate Professor, Africana Studies/Director
- Department Chairperson/ Assoc Professor of MIS
- Professor of STEM Education
- Dean, School of Humanities and Behavioral Social Sciences
- Faculty Development, Teaching and Advising Center
- Distance Education Coordinator
- Manager of Title III, Sponsored Programs and Services
- Director, Academic Technology and Distance Education
- Vice President of Institutional Advancement, Title III and Sponsored Programs
- Director of Online Learning Senior Educational Technologist
- Interim Associate Vice Chancellor of Academic Innovation
- Associate Vice President
- President

When asked about the length of time in their current role, the majority of respondents (54 percent) indicated that they have been in their current role for five years or less.

Graph 22. How long have you served in your current role?



HBCU LEADERS PERCEPTIONS OF THE OPEN EDUCATION FIELD

Goals

Leaders of open education at HBCUs cite Access and Equity as the primary goals of the open education field. They see open education as an instrument to ensure that students have greater access to college, to a quality education, and relevant resources.

Access and Equity

- “To remove barriers to educational equity and social mobility.”
- “The broad goal of the Open Education field is to ensure equality and equity across institutions in access to relevant, contemporary resources.”
- “To make education accessible to all.”
- “The broad goals for OER: 1. Access 2. Student Success 3. Employable Skill Development 4. Sustainable Futures 5. Defeat generational poverty 6. Impact recidivism 7. Promotes inclusivity.”

Other goals cited include Affordability, Expanded and Diverse open education Curriculum, and Shared Knowledge. These goals support the overarching goals of Access and Equity.

Expanded and Relevant Curriculum

- “To continue to grow, but in such a way that the users can see themselves in the content.”
- “To develop test banks and assignments to strengthen the OER materials.”
- “To train faculty and students in the use of open educational resources that support teaching, student learning, research and professional development.”
- “To provide additional training for faculty to develop courses using OER.”

Affordability

- “To remove the barrier of cost from educational textbooks, and thereby make college more affordable and more accessible.”
- “College affordability, transformative pedagogy for student success, research to inform practices.”

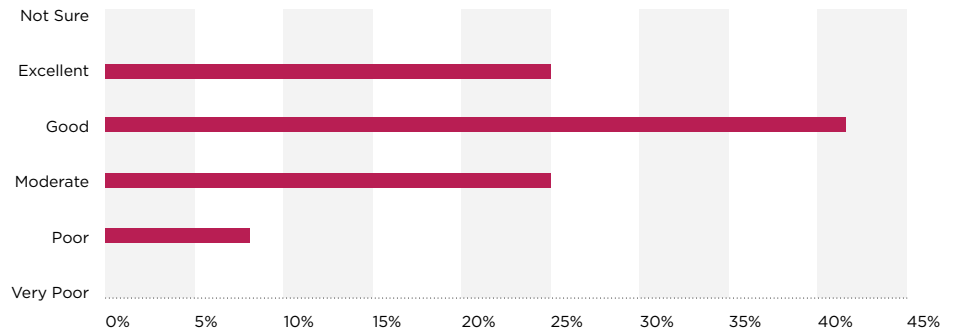
Shared Knowledge

- “To increase enrollment and allow for shared knowledge between various groups.”
- “To enhance and advance learning and the acquisition of new knowledge.”

Achieving the Field's Goals

Two-thirds of respondents (67%) rated the field Good or Excellent in terms of achieving its goals.

Graph 23. How would you rate the open education field in terms of achieving those goals?



Responses ranged from the very broad to specific examples of success:

- “I am seeing great progress across the higher education field.”
- “We have already established a successful baseline in creating OER courses.
- “The leadership and support of Dr. Melton and Dr. Hanley have increased the engagement and use of OER by HBCUs.”
- “The MERLOT Affordable Learning Solutions (AL\$) and SkillsCommons OER Workforce Initiatives have assisted in united HBCUs with their own AL\$ such as the HBCU Affordable Website: <http://www.hbcuals.org>.”

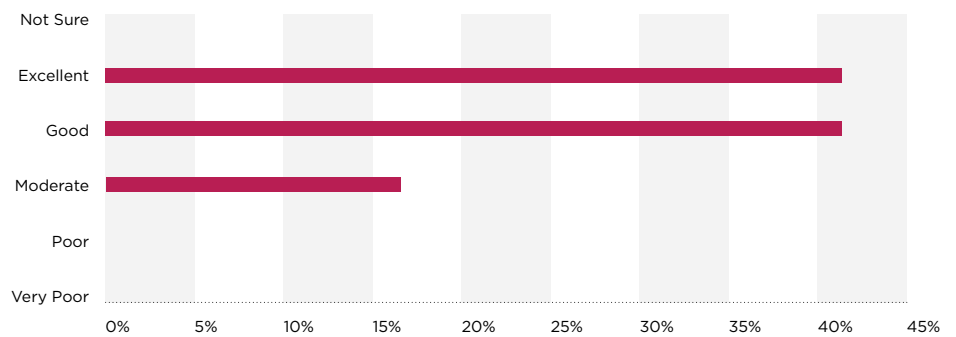
One-third of respondents rated the field Moderate or Poor in terms of achieving its goals. There is a sense that while progress has been made, there is more to be done in the field. In their open-ended responses respondents did not offer specific information about areas that could be improved for the field to better achieve its goals and were more general in their responses.

- “I think there has been some effort made, but more has to be done.”
- “There is always room for improvement.”
- “More resources can be created and scaled more broadly.”
- “Funding is needed, and unfortunately is very scarce.”
- “Faculty members would like to have more test banks built that are in alignment with OER materials.”

Effectiveness in Serving Stakeholders

84 percent of respondents rated the open education field’s effectiveness in serving its stakeholders as Good or Excellent.

Graph 24. How would rate open education field’s effectiveness in serving its stakeholders?



Good/Excellent

- “Both faculty and students have benefitted from OER”.
- “The open education field is a breath of fresh air as it has opened the eyes of many to the need to invest time and resources in the leaders of tomorrow.”
- “There are so many OER resources available and OER material is constantly being developed and added in OER repositories.”

Those that felt that the field was less effective in serving its stakeholders, focused more on the resources or services provided than on the types of stakeholders served.

Moderate

- “We are, after more that 20+ years of movement, still at the stage of raising awareness.”
- “There are still gaps in several subject areas.”
- “The cohort network has been most helpful for training, use, and exploration.”
- “...However, the goal is to assist HBCUs with strategic planning and incorporating OER in their vision and mission.”

Factors True for the Field

The factors that most highly reflect the field are respected credentialing / ongoing professional development training for practitioners and leaders, and exemplary models and resources. Factors that are less highly rated as reflecting the field are a broad base of support from major constituencies, and organized funding streams.

Graph 25. Please rate your agreement with how well the following factors reflect the open education field.

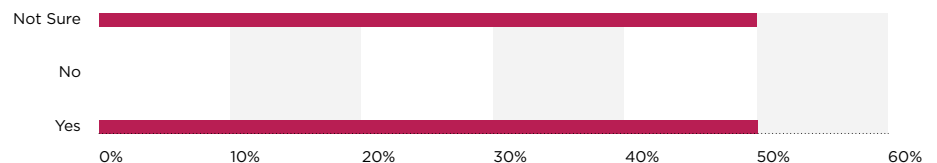


● K-12 Weighted Average

Gaps in Audiences and Stakeholders

Despite the strong ratings given to the field for effectively serving its stakeholders (84 percent), 50 percent of respondents said there are gaps in stakeholders effectively served. Another 50 percent were Unsure whether there were gaps.

Graph 26. Do you think there are gaps in terms of audience/stakeholders effectively served by the open education field?



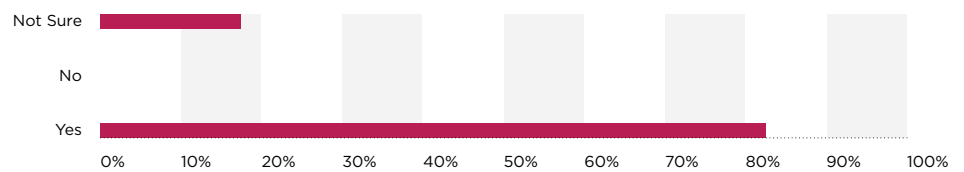
Respondents said institutional leadership, as stakeholders, needed to be made more aware of open education and engaged in strategic planning for OER implementation.

- “Awareness of leadership is a major issue.”
- “There is a lack of strategic planning stating at the top leadership level for full implementation of OER across disciplines.”

Unmet Needs

83 percent of respondents said there were unmet needs in the open education field.

Graph 27. Do you think there are unmet needs in the open education field?



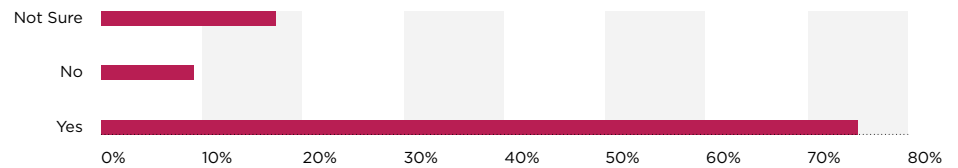
These unmet needs include open education content, funding, policies, and training and research.

- “Several gaps in subject areas exist.”
- “There is a need for easy and incentivized ways for faculty to share their own OER, especially in subject areas. “
- “More is needed in foreign languages and science labs, assignments, test banks, etc. “
- “Funding.”
- “There is a need for national, state, and local policies.”
- “Training, and research are needed.”

The Need for New Networks

Seventy-five percent of respondents said there is a need for new open education networks to grow and sustain the open education field.

Graph 28. Are new networks needed to grow and sustain the open education field?



This is substantially higher than the number of leaders of open education networks who indicated that new networks are needed.

Are New Networks Needed in the Open Education Field?		
Response	Leaders of Open Education Networks	HBCU Leaders
Yes	35%	75%
Not Sure/No	65%	25%

- “New networks are needed especially for the HBCUs. There is a lack of culturally relevant materials and resources relating to minorities and underserved populations.”
- “Every network helps close a gap in the field and overlapping (networks) is not a bad thing.”
- “The existing networks in the HBCU ecosystem have not had the full opportunity to grow and become self-sustaining due to lack of staffing and funding.”

Summary

For HBCU open education leaders, access and equity are the major goals of the open education field. The other goals cited are affordability, expanded and diverse curricula, and shared knowledge. These support the overarching goals of access and equity in education.

Most respondents felt the field was doing a good or excellent job of achieving its goals and effectively serving its stakeholders.

According to the survey results, the factors that most strongly reflect the open education field are respected credentialing and ongoing professional development for practitioners, and exemplary open education models and resources.

Half of the respondents indicated there are gaps in stakeholders served by the open education field; and more than 80 percent felt there are unmet needs in the field.

Three-fourths of the HBCU open education leaders said there is a need for new networks in the field to offer new ideas and provide more culturally relevant materials and resources to minority and underserved students.

**Appendix A:
Open Education
Network and Field
Survey Protocol**

Network Leader Survey

Thank you for agreeing to participate in this survey. edBridge Partners is conducting this survey on behalf of the William and Flora Hewlett Foundation. The purpose of the survey is to help the Hewlett Foundation and the open education field better understand how and how well different open education networks are serving the needs of different communities, as well as whether and to what extent participation in networks facilitates open education adoption and use.

The survey results will help the Hewlett Foundation best support the open education field and will also provide leaders and organizers of open education networks with information about how they can continue to meet the needs of their communities.

The information you provide is confidential and will only be seen by edBridge Partners and the Hewlett Foundation. Any published reports, briefs or summaries utilizing the data collected from the survey will be anonymized and the data will be reported in the aggregate only.

The survey should take about 20 minutes to complete.

Thank you in advance for completing the survey. If you have any questions, please contact edBridge Partners at cpollock@edbridgepartners.com.

Personal Information

Please answer a few questions about yourself.

* 1. Name

* 2. Organization

* 3. Job Title

* 4. How long have you served in your current role?

- Less than 1 year
- Between 1 - 5 years
- Between 5 - 10 years
- More than 10 years

* 5. Email

Open Education Networks

The following questions relate to your role as a leader of an open education network.

If you lead more than one open education network you will have an opportunity to answer these questions in relation to that other network after this section.

* 6. Open education network name

* 7. What year was your network formed?

* 8. How many staff do you have dedicated to the operation of the network?

- Less than 5
- Between 5 and 10
- Between 11 and 20
- More than 20

* 9. How many members (individuals or organizations) are currently in your network?

- Less than 50
- Between 51 - 149
- Between 150 - 249
- Between 250 - 499
- More than 500

* 10. How would you describe your network membership?

- Stable
- Growing
- Declining

* 11. Who is the audience or community served by your network (check all that apply)?

- State leaders
- Policymakers
- System/Institutional leaders
- District leaders
- School leaders
- Higher education professionals
- K-12 professionals
- Faculty
- Teachers
- Librarians
- Students
- Other (please specify)

* 12. What are the primary sources of funding for your network?

- Foundation
- Government
- Membership Fees
- Fees for Service
- Private Donors
- Other (please specify)

* 13. What are the main activities of your network (check all that apply)?

- Professional development/training
- Advocacy/policy
- Resource development/publishing
- Research
- Information exchange/collaboration
- Other (please specify)

* 14. To what extent do your network activities specifically advance equity, diversity, and inclusion?

Not at all A little A moderate amount A lot A great deal

Please explain:

* 15. How would you describe the main goals and priorities of your network?

* 16. How would you rate your network in terms of achieving your strategic priorities?

Very Poor Poor Fair Good Excellent

Please explain

* 17. How would you rate your network in its ability to serve its audience or stakeholders?

Very poor Poor Fair Good Excellent

Please explain:

* 18. How would you rate the health of your network?

Very Poor Poor Fair Good Excellent

Please explain

* 19. Please rate the degree to which the following factors are true for your network.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Strong leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared vision and common objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Respect and mutual trust between members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effective communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clear value and benefit for member participation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clear governance and decision-making structures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effective coordination of network activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Committed members (i.e. members willingly commit time and resources to the network)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sufficient resources (funding, staff, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 20. Would you like to answer these questions for another open education network that you lead?

Yes

No

Open Education Networks (2)

The following questions relate to your role as a leader of another open education network.

* 21. Open education network name

* 22. What year was your network formed?

* 23. How many staff do you have dedicated to the operation of the network?

- Less than 5
- Between 5 and 10
- Between 11 and 20
- More than 20

* 24. How many members (individuals or organizations) are currently in your network?

- Less than 50
- Between 51 - 149
- Between 150 - 249
- Between 250 - 499
- More than 500

* 25. How would you describe your network membership?

- Stable
- Growing
- Declining

* 26. Who is the audience or community served by your network (check all that apply)?

- State leaders
- Policymakers
- System/Institutional leaders
- District leaders
- School leaders
- Higher education professionals
- K-12 professionals
- Faculty
- Teachers
- Librarians
- Students
- Other (please specify)

* 27. What are the primary sources of funding for your network?

- Foundation
- Government
- Membership Fees
- Fees for Service
- Private Donors
- Other (please specify)

* 28. What are the main activities of your network (check all that apply)?

- Professional development/training
- Advocacy/policy
- Resource development/publishing
- Research
- Information exchange/collaboration
- Other (please specify)

* 29. To what extent do your network activities specifically advance equity, diversity, and inclusion?

A great deal A lot A moderate amount A little None at all

Please explain:

* 30. How would you describe the main goals and priorities of your network?

* 31. How would you rate your network in terms of achieving your strategic priorities?

Very Poor Poor Fair Good Excellent

Please explain

* 32. How would you rate your network in its ability to serve its audience or stakeholders?

Very poor Poor Fair Good Excellent

Please explain:

* 33. How would you rate the health of your network?

Very Poor Poor Fair Good Excellent

Please explain

* 34. Please rate the degree to which the following factors are true for your network.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Strong leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared vision and common objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Respect and mutual trust between members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effective communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clear value and benefit for member participation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clear governance and decision-making structures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effective coordination of network activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Committed members (i.e. members willingly commit time and resources to the network)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sufficient resources (funding, staff, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 39. Do you think there are gaps in terms of audience/stakeholders effectively served by the open education field?

- Yes
- No
- Not Sure

Please explain:

* 40. Do you think there are unmet needs in the open education field?

- Yes
- No
- Not Sure

Please explain:

* 41. Are new networks needed to grow and sustain the open education field?

- Yes
- No
- Not Sure

Please explain:



42. Thank you for completing our survey. May we contact you about your responses if we have any questions?

Yes

No

**Appendix B:
Regional Networks
Field Survey Protocol**

State, Province, and District Network Survey

Thank you for agreeing to participate in this survey. edBridge Partners is conducting this survey on behalf of the William and Flora Hewlett Foundation. The purpose of the survey is to help the Hewlett Foundation and the open education field better understand how and how well different open education networks are serving the needs of different communities, as well as whether and to what extent participation in networks facilitates open education adoption and use.

The survey results will help the Hewlett Foundation best support the open education field and will also provide leaders and organizers of open education networks with information about how they can continue to meet the needs of their communities.

The information you provide is confidential and will only be seen by edBridge Partners and the Hewlett Foundation. Any published reports, briefs or summaries utilizing the data collected from the survey will be anonymized and the data will be reported in the aggregate only.

The survey should take about 10 minutes to complete.

Thank you in advance for completing the survey. If you have any questions, please contact edBridge Partners at cpollock@edbridgepartners.com.

Personal Information

Please answer a few questions about yourself.

* 1. Name

* 2. Organization

* 3. Job Title

* 4. How long have you served in your current role?

- Less than 1 year
- Between 1 - 5 years
- Between 5 - 10 years
- More than 10 years

* 5. State, Province, or District Name

* 6. Email

* 11. Do you think there are gaps in terms of audience/stakeholders effectively served by the open education field?

- Yes
- No
- Not Sure

Please explain:

* 12. Do you think there are unmet needs in the open education field?

- Yes
- No
- Not Sure

Please explain:

* 13. Are new networks needed to grow and sustain the open education field?

- Yes
- No
- Not Sure

Please explain:



14. Thank you for completing our survey. May we contact you about your responses if we have any questions?

Yes

No

Appendix E: Interview Report

EDBRIDGE PARTNERS, LLC ON BEHALF OF THE
WILLIAM AND FLORA HEWLETT FOUNDATION

Formative Evaluation of Open Education Networks

Summary of Network Leaders Interview Findings

JANUARY 13, 2021



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INTRODUCTION

At the request of the William and Flora Hewlett Foundation, edBridge Partners, LLC is conducting a formative evaluation project of the existing and potential open education networks in North America, and their role as drivers and sustainers of the open education field.

The first phase of this work entailed establishing a baseline mapping (“Network Map”) of the current networks. In this first phase of work, we determined to what extent, and how, open education experts in academia, government, industry, and other relevant sectors began working together to establish their networks and what the representation of the current networks and open education field looks like.

In Phase Two of this work, we focused on the role of the open education networks in the open education field. For the field of study for this phase, we looked at a cross-section of the identified networks characterized as influential networks, developing networks, and strong networks that are not currently engaged in open education. Qualitative research was conducted with the leaders of each of the open education networks identified for Phase Two. The research fell into three categories:

- Online survey
- One-on-one in-depth interviews
- Group conversations among network leaders characterized as Dialogue Days

Questions for the qualitative research were developed around the following five components of the Strong Field Framework:

1. Shared Identity
2. Standards of Practice
3. Knowledge Base
4. Leadership and Grassroots Support
5. Funding and Supporting Policy

To get a more comprehensive perspective of the field, edBridge added and evaluated a sixth component that addressed Vision and Direction for the Future of the field.

In October and November of 2020, edBridge Partners conducted a series of one-on-one interviews with thirteen leaders of networks characterized as influential networks in the Open Education field. These leaders represented long-established networks such as Creative Commons, higher education networks including the HBCU Affordable Learning Community, organizations such as ISKME & SPARC, and foundations such as the Rebus Foundation (See APPENDIX A for the individuals interviewed).

In addition to these network leaders, and at the request of the Hewlett Foundation, edBridge piloted the interview protocol with two members of the Foundation program staff to gauge where there would be questions or additional clarity required around components of the survey.

INTERVIEW PROTOCOL

Each interview was approximately 60-minutes long. All interviews were conducted virtually using Zoom and were recorded, with permission from the subjects. Prior to the start of the interview, we provided each subject with an introduction of edBridge Partners and a brief overview of the study about open education for the Hewlett Foundation, and its goals.

For the purpose of the interview, we also defined two terms for consistency, “open education” and “field”. The term “open education” was defined as encompassing resources, tools, policies, and practices that employ the flexibility of open licensing to allow others to freely access, reuse, translate, and modify them. A “field” was defined as a community of organizations and networks working together towards a common set of goals and using complementary approaches to achieving those goals.

A total of sixteen questions were included in the interview protocol, grouped according to the five categories of the Strong Field Framework as well as one additional category around Vision and Future Direction. In order to keep a good flow of conversation, not all questions were asked of each participant and some questions were asked in a different order, if the situation required it (see APPENDIX B for the interview questions).

INTERVIEW FINDINGS

Field Identity

How would you describe what the open education field is collectively trying to accomplish? Are there differing perspectives about what needs to be accomplished by the field?

Many of the interviewees described a field that is not cohesive or necessarily seeking to accomplish the same things. Some respondents

“

Right now, there are some people who see open education as a small incremental change to the existing system. You take a proprietary textbook that's traditionally been purchased from a publisher, you swap that out for an open textbook, done, that's what open education is. But there is another group of people in the open education space, who see open education as a paradigm shift, much bigger transformation, or the potential for the transformation of education. And there's a tension between those two groups.”

“

There really isn't a field - there's a bunch of people who are trying to do the same thing, but with totally different strategies who aren't very well connected. And especially now, for some reason, connections have weakened.”

“

Generally, the open education field is trying to make education more equitable, and making sure that all students have equal access to succeeding and are supported in their efforts”

“

What we're trying to accomplish is to improve student learning. There are different ways that is being accomplished- through improved access to resources to creating affordable zero cost resources, through policymaking and decision making at the either national or global level.”

described a field that seems to be fractured into two camps - one that is dedicated to OER as a tool for affordability and access to a quality education from an economic standpoint and the other dedicated to more transformational change of the education system through OER and open pedagogy, focusing on the democratization of authorship.

It was mentioned that perspectives seemed to depend on when you entered the field. The early activists and evangelists focused on the idea of open pedagogy and the philosophy of openness, while people who entered the field later focused on learning outcomes and affordability and access.

Several interviewees discussed a difference in strategies as well, noting that even when different organizations are aligned in mission (promoting the use of open education), their tactics might be completely different and sometimes at odds with one another, resulting in some tension between different advocates.

In terms of what the field is seeking to accomplish, respondents frequently mentioned increasing access to education, expanding access for the underserved, engaging as many people as possible in education and maximizing participation across all sectors, geographies, and stages of life, and using open educational resources to improve learning.

Do individuals and organizations in the field collaborate or compete? In what ways?

Respondents agreed that there is both collaboration and competition in the field. Broadly speaking, many noted that it is a collaborative space and

“

Institutions are competitive, especially when it comes to funding and student enrollments. So you have this real tension around a culture and ethos of sharing and collaboration at the grassroots level butting up against practices and policies and funding that are based totally on competition.”

“

“There is a natural competition within the field because many organizations are competing for grant dollars and are membership-driven. In some ways, this is good in that it encourages visionary thinking; in other ways, competition reduces opportunity for collaboration, is confusing for individuals and organizations, may leave some people/institutions out, and creates duplication of effort.”

that individuals in the field will happily work together and share information. However, there is a limited pool of resources, which lends itself to competition for this funding as organizations try to carve out their niche and demonstrate the value of their initiatives over those of others.

The consensus among these leaders was that more collaboration is needed. One individual suggested collaborative grant opportunities to link efforts across organizations and institutions and to maximize return on investment.

How diverse or inclusive is the open education field?

The consensus amongst respondents is that the field is neither diverse enough nor inclusive enough, and for the most part, the community

“

But we recognize even within our own network, that we don't have the level of diversity among our participants that would like, we're working towards that angle of being more equitable, more inclusive, more diverse. But we've got to work harder at our own membership, to be more diverse.

“

We've been talking about equity and access to quality educational resources and materials for 10 years. But now we're talking about equity and access and inclusiveness in more sophisticated ways. We're trying to get other voices to come in so that we're not all talking in an echo chamber all the time. But we go out of our way to get people that are as diverse a mix as we can possibly get. And when we talk about diversity, we're talking about geographic diversity, we're always looking for a mix of men and women and other gender identifications, we're looking for different races, people who speak different languages.”

lacks racial diversity in both leadership and membership. Many interviewees mentioned specific, intentional activities trying to bring equity and inclusiveness to the forefront, such as commitments from the #OpenEd20 planning committee to feature more BIPOC voices, and CCCOER's executive council's plans to address policies and behaviors but agreed more needs to be done within the field and within the networks themselves.

Many leaders reflected that the community needs more authentic voices to be diverse, and that their organizations can do a better job at finding and engaging those who

may directly serve marginalized communities that may benefit from OER. These voices may be early career educators at community colleges, faculty at tribal colleges serving indigenous populations, and educators in urban districts. Overall, there is a strong belief in the potential of OER to enable diversity of authorship and include more inclusive content, but there has not been enough work around this yet to include those voices.

What do you believe are some of the guiding principles of the open education field? For example, openness; access to high-quality educational resources; sharing and collaboration; diversity of perspectives

Respondents agreed on a few guiding principles for the field:

1. Broadening access to education and across different communities
2. Making education more effective, increasing student success
3. Collaboration and sharing of content, resources, policies

Leadership and Support

Who are the influential leaders, organizations, and networks in the field? In what way do they lead the field? How would you characterize their actions to build the field?

The following individuals and organizations were noted as influential in the field, in order of most frequently mentioned:

- Nicole Allen / SPARC
- David Wiley / Lumen Learning
- David Ernst / Open Education Network
- Open Stax
- Cable Green / Creative Commons
- open education Global and CCCOER
- UNESCO
- BC Campus
- MERLOT
- ISKME / OER Commons
- Commonwealth of Learning
- Wikimedia
- SUNY
- MIT Open Courseware
- John Hilton, Open Education Group
- Rajiv Jhangiani, Kwantlen Polytechnic University
- Robin DeRosa, The Open CoLab
- US PIRG
- DOERS3
- Achieving the Dream
- Skills Commons
- WICHE
- Michelson Foundation
- California Community Colleges
- Regina Gong, Michigan State

These leaders were cited for their efforts across multiple areas in the field – from professional development and training opportunities, fostering linkages and cross-connections among organizations, to advocacy campaigns and establishing policy.

Who (or what organizations) have not been as visible but should receive more attention?

Respondents cited minority-serving institutions as needing a more visible role and voice in the field and within networks. K12 practitioners and administrators and higher education administrators were cited as stakeholders needing greater visibility and service from networks.

- HBCUs
- K12 teachers, superintendents, curriculum developers
- Higher Ed administrators and decision makers

Respondents cited different organizations, institutions, or regional networks as doing good work, but not necessarily being visible:

- Commonwealth of Learning
- University of Saskatchewan
- ECampus Ontario

Which constituencies support the field? Which constituencies do not? Who (or what organizations) are the major skeptics about the open education field?

All respondents noted that faculty, foundations, librarians, and other educators are supportive of the work.

“

There's a lot of pushback from publishers or folks who see a value to kind of more capitalist competitive markets, and that there's maybe a quality issue when you open academic materials up”

“

There's certainly still skeptics, I'm hoping that they're few and far between at least lessening year to year but there certainly are, there's folks who still see this, as a fad, which baffles me this many years in. But then there are folks who dabbled in this maybe eight years ago and found that the quality was substandard, and still hold to their guns that all OER is garbage because of that one experience they had eight years ago.”

Skeptics were either groups that are in competition or opposition to OER, or lack understanding or awareness of the benefits of OER. The skeptics noted included publishers, some faculty who see open education as a fad that has a lower standard of quality, and those who are unaware of what OER is or the potential of OER are considered as skeptics about the field.

Standards of Practice

Do you feel there is adequate professional development and training for leaders and practitioners in the open education field?

Respondents noted that the amount of professional development opportunities is increasing, but more needs to be done to scale what is available to an adequate level. Several interviewees mentioned that there was excellent professional development available, but that it was only available to 20 or fewer participants at a time, or very focused on a particular slice of the field – copyright, librarians, policy, for example.

Respondents noted there needs to be more faculty-centric professional development opportunities, which will also help increase awareness and

adoption of OER. They noted that an intentional alignment to promotion and tenure guidelines would help faculty get recognized for open education contributions.

One respondent noted that there is a lot of investment generally in education for professional development itself, and perhaps there is an opportunity for more of the professional development to be openly licensed.

“

It's improved, but very small and not formalized into longer term programs that cover more than one particular aspect of open education.”

“

There's a lot of money in PD that's being spent today, just generally. With OER, not being at the forefront of a lot of those conversations, there's an opportunity to actually have that be included as an integral part of professional development.”

Knowledge Base

Do you believe there is a well-developed research and knowledge base to help inform the open education field (please explain)?

Respondents noted that overall, there is not enough research demonstrating the measurable impacts and outcomes of OER over the

long term in terms of student learning and the impact of open pedagogy. Several interviewees noted that it was still difficult to measure the success and understand the impact of moving to open resources and open pedagogy on learning outcomes since there are many other factors that can influence these outcomes.

“

We sort of built our own trap, we put so much focus on dollars saved. And now we have legislators that want reports, they're based on dollars saved, and maybe less so on student performance or student retention. But then, as open pedagogy starts to emerge, there's no real way to measure that in the impact on student learning, or the community at large.”

Another area that was cited as a research gap relates to the Return on Investment (ROI) for OER. The interviewees noted that there is little to no research that demonstrates the financial impact to an institution's revenue



I think there is a need to show that the return [on investment] has far exceeded the investment so that this is so if you're a decision maker around making investments, and you saw something that generates this incredible return, you'd want to do more of it."

makers need to have and understand, and what advocates need to inform policy and legislation at the state and federal level to show the economic benefits of OER.

when OER is implement across programs - how for every dollar invested in OER that translates to \$X in increased revenue due to lower dropout rates and increased completion rates (for example).

This is the data that decision

Funding and Policy

Is the policy environment supportive to growing the open education field? In what ways?

Interviewees noted that the policy environment overall is uneven—very supportive in some states and lacking in other states. While awareness of how OER can help advance policy is improving, there is not enough uniform policy support and legislation at the state and federal level around OER. Clear metrics and data that can support policy are needed.



We're still stuck in OER is a nice thing to do. Versus OER is the thing we have to do because it delivers this KPI, whatever that KPI is and I think that's kind of some growing up that the ecosystem has to do and, if we do, the institutions and the policy will catch up"

Is the field actively involved in helping to develop the policy environment? Who or what entities lead that effort?

Respondents shared that leaders in the field are getting better at helping to develop the policy environment and to educate policymakers about how to

leverage OER as a solution in their policy context. They also cited challenges related to competing at the state level with publishers who engage lobbyists to get the direct access to the decision makers.



We see a lot more local advocacy work happening of OER advocates going to their politicians and asking for this...making sure that as states come up with plans for what happens in the future that OER is part of that, I think it's accelerating."

One of the respondents suggested the creation of a cooperative

trade organization that would advocate for the field's policy agenda and serve as a unifying voice. This organization could serve as a neutral party to protect and advance the interests of the field, coordinate efforts across organizations, and lobby at the state and federal levels without having a personal stake in the outcomes.

Do you feel there is sufficient funding for the field to achieve its goals?

Interviewees all cited a need for additional funding, mainly advocating for more foundations and governments to provide funding for open education so that everyone was not dependent on the Hewlett Foundation as the only source of support.

Vision and Future Direction

What does the field need to do to have greatest impact and sustained success in the future?

Responses to this question varied across respondents, and included some of the following ideas:

- Expand the research and communication around return on investment and learning outcomes.
- Continue to advocate to make OER the default strategy at the district level.
- Continue to invest in the “unsexy” work of building sustainability – training, support, building community within institutions.
- Give funding directly to those doing the work.
- Create a common general education core across universities and ensure that the learning materials are all OER.
- Have the key decision-makers from institutions at the table to better understand the value and impact of OER

“

This has been very much a grassroots movement driven from the bottom. And if we could get some high-level top support that recognizes it, encourages it, rewards it, incentivizes it, I think it would just like take off. And but we need some pretty big efforts, not small ones.”

“

If there was somebody who could play that role of liaison, who is actively communicating with all these different organizations and saying, okay, where are you focused? Did you know that this group is focused here? Have you thought about connecting together and seeing if you can come out with a new output or a better output together?”

A couple respondents also noted that better communications across and between networks is important to advancing the field and avoiding duplication of effort. One individual specifically mentioned an “OER Network Liaison” whose role it would be to seek out the plans and strategies of the various networks and help to connect the dots between each network.

Several respondents also specifically mentioned courseware as a significant gap for the field, in terms of being able to compete with publishers. They noted that until the openly-licensed materials come with all the “bells and whistles”, it makes it very labor intensive and difficult for faculty to adopt.

“

What we need to do is take a look at the courseware packages that are being offered by the commercial publishers, and we need to emulate those, we basically need to recreate all of that into an open platform, or an open sustainability model. You can tell an instructor right now, I want you to create an open pedagogy assignment. And I want you to do an open assessment, and I want you to use an open textbook. Oh, and I need you to rewrite your course, while you're doing that, and add the PowerPoints. And they're like, I don't have time for that. I'm just going to go to McGraw-Hill, download those PowerPoints, the syllabus and everything like that. And I'm done. So, I think what we're forgetting is that, while the instructors have agency to do what they want, at the same time, we need to really be thinking about what is an equitable model for an instructor? Because right now, we've been so focused on what is the equitable model for the student, we're forgetting about the pre-work which is the creation of the curriculum.”

As the field matures, what are the most important gaps that need to be filled in terms of constituencies served or stakeholder voice?

Interviewees noted that the field needs to better support the OER advocates, to help them develop project management and change management skills,

and to ensure that advocates are reaching out and connecting to practitioners regularly, to bring them into the field.

“

How do you bring those smaller voices, the voices of the lone practitioner who's been slogging away at this stuff on their own? And how do you kind of connect them with like-minded colleagues, so that they can feel they're not alone, that they are kind of part of a larger network?”

Interviewees also noted that support from institutional leadership will be critical going into the future, and in order to get that support, more data on return on investment will be needed. One respondent also suggested disciplinary societies that can review and vet OER resources, which may go a long way to supporting OER for tenure and promotion for faculty.

“

Presidents or academic leaders really are kind of crucial. But often, the incentives for them are really short term. So when you're asking them to think about doing something that maybe doesn't pay off immediately, and in fact, it may be detrimental immediately. But on longer term, through an institutional investment or change in these things, you'll start to see significant benefits, oftentimes, it's just, that's just not part of the culture, of higher ed leadership to take those kind of risks. It's rare those that do.”

Ideally, what will the field look like in 10 years?

Many of the interviewees shared a vision of a future ten years from now where OER will become the default option for both districts and higher education and will be integral to every aspect of education. They noted that it would be

considered more of a professional practice, than a grassroots movement, and that institutions, state systems and others would be working collaboratively and intentionally to scale OER.

“

But instead of this being a hard-fought conversation and battle to have it recognized, just naturally integrated every step throughout the student lifecycle. That's what I'd love to see in 10 years.

“

10 years from now, ideally, there wouldn't [be an open education field]. Ideally it would be that open is just a ubiquitous framework for education.”

What, if any, national or world events do you believe are affecting the potential for the advancement of the open education field?

Unsurprisingly, many respondents pointed to the COVID-19 pandemic as both an opportunity for increased awareness and usage of OER as millions

“

I think it's worth considering what happens when the fake news universe starts impacting OER. We're building a system where anyone can edit any textbook and easily you can change the chapter called slavery was bad to the chapter that says slavery was great, with a couple of edits. So, I think there's probably some idealism or naivete that we've grappled with as an ecosystem, a lot like the internet, we assume good faith of the universe. And the universe has shown that there are lots of bad faith ways we can deal with information technology.”

of students across k12 and higher education shifted to virtual or hybrid models of learning, and as a challenge, with many other competing priorities taking up the attention of leaders and faculty.

Some respondents also mentioned concerns about the digital divide and equity in access to broadband required to access digital materials worldwide.

Another respondent conjectured about the vulnerability of open educational resources to “fake news” or manipulation, which may be a risk that some have not considered.

CONCLUSIONS

The work of assessing the open education field, in collaboration with the field's leaders, is an important step towards uniting the networks and organizations towards working in more powerful ways to build the field. Network leaders were thoughtful and candid in their discussions about where the field stands today. In each of the major areas needed to build a strong field there are strengths and robust elements, as well as weaknesses and significant gaps that will need to be addressed to advance the field and achieve the promise of open education.

Field Identity

Network leaders strongly identify as members of the open education field and are a passionate and collegial group who value sharing knowledge and information with their peers. They have common goals of increasing access, improving student success, and championing openness in authorship, content, and pedagogy. There are differences in the degree to which they prioritize these goals. There is tension between those who see open education as a way to transform education and those who take a more pragmatic approach. However, all fields need both visionaries who may be more philosophical and can paint a bigger, aspirational view for the field, and pragmatists who take a more practical, incremental approach and drive implementation and build capacity from the ground up.

Due to the current state of the field and tenor of the times, the network leaders are reflective about the composition of the field and the need for greater diversity and for racial equity in education. They see increasing diversity and inclusiveness of both their networks and the field as imperative to realizing their goals and fulfilling the promise of open education.

The community needs more authentic voices to be diverse, and organizations can do a better job at finding and engaging those who may directly serve marginalized communities that may benefit from OER. To strengthen the field, more needs to be done to integrate DEI throughout the leadership, membership, practices, and policies in the field.

Leadership and Support

There is strong and influential leadership working to advance the field. Network leaders identify several prominent individuals and exemplary organizations from both their networks as well as regional networks. There is strong grassroots support for open education. Conversely, they do not feel as confident about having a broad base of support from institutional decision makers and policymakers. This will be key to strengthening the field.

Network leaders are champions and true believers in open education. As such, they see skeptics as either those who stand to lose if open education grows (publishers) or those who do not understand or are not aware of the value and benefit of open education. A more textured understanding of why different stakeholders or audiences remain unengaged or skeptical of the field might improve advocacy and outreach efforts by current network leaders.

Standards of Practice

Professional development in the field is increasing. Most felt the training and professional development was good, but needed to be made more widely available. There needs to be more professional development for faculty, aligned with tenure and promotion policies, in order to accelerate adoption.

Knowledge Base

There needs to be greater development of the knowledge base in the field in terms of the evidence of the impact of open education, and the efficacy and benefits of investing in OER. Network leaders identified gaps in the field in research demonstrating the measurable impacts and outcomes of OER over the long term in terms of student learning and the impact of open pedagogy. There is a need to establish the return on investment (ROI) and to identify experts who can calculate this measure for the field.

Funding and Policy

Much needs to be done to expand the funding sources for open education. The consensus is that there is not currently sufficient funding for the field to achieve its goals. Most networks do not have self-sustaining business models yet. Leaders suggest collaborating on initiatives and funding proposals, and sharing strategic plans to find common areas and opportunities to join forces.

While leaders in the field are actively involved in helping to develop the policy environment for the open education field and are getting better at educating policymakers about how to leverage OER as a solution in their policy context, there is a sense that state and national policy support remains uneven. It was suggested that an independent trade organization could be established to unify the field's policy advocacy and lobby for the field's interests with state and national legislators and policymakers.

Vision and Future

The shared a vision of a future for the field is for open education to become the default option for both districts and higher education and be integral to every aspect of education. The field would develop to be considered more of a professional practice, than a grassroots movement, and that institutions, state systems and others would be working collaboratively and intentionally to scale OER.

APPENDIX A

List of Network Leader Interviewed:

4. Nicole Allen, SPARC
5. Amanda Coolidge, BCcampus
6. Kevin Corcoran, Connecticut State Colleges and Universities and Chair, Driving OER Sustainability for Student Success (DOERS3)
7. Una Daly, CCCOER
8. David Ernst, Center for Open Education, University of Minnesota
9. Cable Green, Creative Commons
10. Meredith Jacob, Creative Commons, USA
11. Hugh McGuire, The Rebus Foundation
12. Robbie Melton, Tennessee State University and Chair, HBCU AL\$ Network
13. Lisa Petrides, ISKME
14. Richard Sebastian, OER Degree Initiative, Achieving the Dream
15. Tanya Spilovoy, WCET
16. Paul Stacey, Open Education Global

APPENDIX B

Research Protocol: Interviews of Leaders of Influencer and Developing Networks

Introduction

My name is _____ and I am with edBridge Partners. We are conducting a study about open education for the Hewlett Foundation. Thank you very much for your willingness to participate in today's interview.

To accurately capture our conversation, I would like to record it. edBridge Partners, the Hewlett Foundation and our transcription service will have access to this recording. We will delete the recording once our research is complete. Do I have your permission to record our conversation? (If they do not agree to be recorded, we will request to still proceed with the interview and take detailed notes.)

As part of the study, we are interviewing leaders of open education networks. From the interviews we want to learn how and how well different open education networks work together, as a field, to contribute to the growth of open education; and how the field, with its current participants, is serving the needs of different communities.

The results of the study will help the Hewlett Foundation support the open education field and enable a variety of organizations to operate and collaborate more effectively, whether their efforts center on specific aspects of open education or are more broadly-focused.

The results of the study will also provide network leaders and stakeholders with information to help them best meet the needs of their communities.

We encourage you to be as candid as possible. The information you provide during this interview is confidential and will only be seen by edBridge Partners and the Hewlett Foundation. Any published reports, briefs or summaries utilizing the data collected during these interviews will be anonymous.

This interview will take approximately 50 minutes to complete.

For the purpose of this interview, we would like to define two terms, "open education" and "field".

The term "open education" encompasses resources, tools, policies, and practices that employ the flexibility of open licensing to allow others to freely access, reuse, translate, and modify them.

A field is defined as a community of organizations and networks working together towards a common set of goals and using complementary approaches to achieving those goals.

Field Identity

1. How would you describe what the open education field is collectively trying to accomplish? Are there differing perspectives about what needs to be accomplished by the field? (If yes, probe)
2. Do individuals and organizations in the field collaborate or compete? In what ways?
3. How diverse or inclusive is the open education field? (Probe: Are there intentional activities underway to broaden the field in this respect? Are there better ways for different perspectives and voices to be heard?)
4. What do you believe are some of the guiding principles of the open education field? For example, openness; access to high-quality educational resources; sharing and collaboration; diversity of perspectives (Probe: are there any best practices that are widely agreed upon?)

Leadership and Support

5. Who are the influential leaders, organizations, and networks in the field? In what way do they lead the field? How would you characterize their actions to build the field?
6. Who (or what organizations) have not been as visible but should receive more attention?
7. Which constituencies support the field? Which constituencies do not? Who (or what organizations) are the major skeptics about the open education field?

Standards of Practice

8. Do you feel there is adequate professional development and training for leaders and practitioners in the open education field? (If not, probe.)

Knowledge Base

9. Do you believe there is a well-developed research and knowledge base to help inform the open education field (please explain)? (Probe: are there differences between the research/knowledge base in higher ed and K-12?)

Vision and Future Direction

10. What does the field need to do to have greatest impact and sustained success in the future?
11. As the field matures, what are the most important gaps that need to be filled in terms of constituencies served or stakeholder voice?
12. Ideally, what will the field look like in 10 years?
13. What, if any, national or world events do you believe are affecting the potential for the advancement of the open education field?

Funding and Policy

14. Is the policy environment supportive to growing the open education field? In what ways?
15. Is the field actively involved in helping to develop the policy environment? Who or what entities lead that effort?
16. Do you feel there is sufficient funding for the field to achieve its goals? (If not, what areas have the greatest need for more financial support to be stronger and more effective? From where should the primary source(s) of funding come?)

Appendix F: Dialogue Day Report

EDBRIDGE PARTNERS, LLC ON BEHALF OF THE
WILLIAM AND FLORA HEWLETT FOUNDATION

Formative Evaluation of Open Education Networks

Summary of #OpenEd Conference, HBCU, and K-12 Regional and State Network Leaders Dialogue Days

UPDATED MAY 26, 2021 TO INCLUDE OPEN EDUCATION
NETWORK LEADERS DIALOGUE DAYS
(MARCH 2021)



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INTRODUCTION

At the request of the William and Flora Hewlett Foundation, edBridge Partners, LLC is conducting a formative evaluation project of the existing and potential open education networks in North America, and their role as drivers and sustainers of the open education field.

The first phase of this work entailed establishing a baseline mapping (“Network Map”) of the current networks. In this first phase of work, we determined to what extent, and how, open education experts in academia, government, industry, and other relevant sectors began working together to establish their networks and what the representation of the current networks and open education field looks like.

The second phase of the formative evaluation involved conducting qualitative research with network leaders across sectors and stakeholder groups. The forms of research included:

- Online survey
- One-on-one interviews
- Guided group discussions characterized as Dialogue Days

The Dialogue Days built off the findings from the surveys and interviews. The Dialogue Days were organized with pre-determined open education network stakeholder groups around themes where we wanted to delve deeper and gain more understanding of perceptions, beliefs, and concerns about the open education field. The Dialogue Days participants were:

- Dialogue Day 1: #OpenEd20 Conference Attendees
- Dialogue Day 2: Leaders of HBCU Open Education Network Initiatives
- Dialogue Day 3: Leaders of K-12 State and Regional Open Education Networks
- Dialogue Days 4-5: Leaders of National/Global Open Education Networks

The #OpenEd20 Conference provided an opportunity to tap into a group of open education network members who are engaged and interested in the field and were already attending the conference. The Dialogue Day with #OpenEd20 Conference attendees centered around their vision and future direction of the open education field.

The Dialogue Day with the leaders of HBCU open education initiatives followed up on their responses to the online survey. Areas that required deeper exploration and understanding included their views about the needs of their stakeholders and the field, the need for new networks, support and advocacy, and the vision and future direction of the open education field.

In looking at the respondents by sector following the survey and interviews, we wanted to gather more information from K-12 stakeholders to inform the evaluation. The Dialogue Day with leaders of K-12 regional and state networks posed questions related to the open education value proposition for the K-12 sector, open education decision makers, unmet needs of stakeholders and the field, diversity, equity, and inclusion, and the vision and future direction for the open education field.

Finally, in March 2021, we held a two-day series of dialogues with the leaders of the national and global open education networks to share the results of the formative evaluation with them and to facilitate a conversation on diversity, equity, and inclusion in the open education field.

DIALOGUE DAY PROTOCOL

Dialogue Days are facilitated conversations with predetermined groups of stakeholders. The discussions are guided by a set of questions, but participants are encouraged to interact with each other and to practice active listening. Each participant brings their unique perspective and experience to the conversation and, collectively, the group can provide clarity around a set of themes or ideas.

Each Dialogue Day session was 90-minutes long, except for the #OpenEd20 Session, which was constrained to 55 minutes due to conference format, and all were conducted virtually using Zoom and were recorded, with permission from the participants.

Prior to the start of each session, participants were provided with a brief overview of the formative evaluation about open education for the Hewlett Foundation and its goals.

edBridge Partners facilitated the discussion and the questions were targeted to the specific audiences engaged in the dialogues, and covered themes related to the current needs within the open education field, gaps and unmet needs, ways to engage more people in the field, how to ensure the field is diverse and inclusive, and future vision for the field.

To keep a good flow of conversation, not all questions were asked exactly as intended, some questions were asked in a different order, and, if the situation required, we added additional follow-up questions in response to the flow of the dialogue. The protocols for each Dialogue Day are provided in Appendix B and the lists of participants in each session are provided in Appendix A.

DIALOGUE DAY #1: #OPENED20 CONFERENCE ATTENDEES

The Dialogue Day session was conducted at the #OpenEd20 conference on November 12, 2020 via Zoom. The session was titled *Perspectives on the Open Education Field: Current State & Future Vision*. The session was open to all conference attendees. Fifteen individuals participated in the session, representing colleges and universities (9), open education networks and communities (3), research organizations (2), and an advocacy organization (1). See attendee list in Appendix A and research protocol in Appendix B.

The following three questions were posed to participants:

- *What does the open education field need to do to have the greatest impact and sustain success in the future?*

- *How can we ensure that those who are interested in, or may be best served by, open education have a meaningful and permanent place in the open education field?*
- *How can we ensure that all stakeholders have influence over the types of resources available, research, and policies in the field?*

Summary of Discussions

► What does the open education field need to do to have the greatest impact and sustain success in the future?

Participants discussed a broad range of actions they felt would help the open education field have the greatest impact and sustained success in the future. Participants called for improvements in most major areas of the open education field, including: Audiences, policy, professional development, content development, collaboration, infrastructure, and research.

Audiences

- Participants felt students are the primary stakeholders in OER and need to be engaged in OER decision-making to a greater degree. It was suggested that student government associations, student body presidents, and student trustees be tapped as allies and advocates in this work.
- Participants believe underserved student populations, especially in K-12, are being left out of open education due to the digital divide between populations. This will need to be addressed for the field to have the greatest impact.



At the end of the day, students are the stakeholders of our public and private institutions—without students it's just a building.”

Policy

- In terms of legislative policies and support, participants said greater investments in the open education field are needed from state governments to sustain open education efforts. More legislators need to be brought into the open education conversation.
- Participants felt institutional policies should change to include open education activities in tenure and promotion processes and considerations. They believe this will have a substantial impact on faculty adoption and use of OER and contribute to the sustained success of the open education field.

Professional Development

- Participants felt professional development was needed to both educate stakeholders about OER and to build the field. Before building and sustaining the field, professional development is needed to clarify what open education is and is not.

Content

- Participants felt that the additional work required from faculty to develop OER content is preventing sustainability.
- Some participants favored an approach that enables as opposed to requires open education participation; people contribute what they can and want to the field.
- Participants believe it is important for faculty to develop greater agency and confidence in their ability to create open education content. Publishers are currently seen as experts; there needs to be a shift to thinking of faculty as experts.

Collaboration

- Discussions focused on the need for strong partnerships and coordination to have greater impact and sustainability in the open education field. Collaboration is needed between major stakeholders and influencers in the field:
 - » Across silos within higher education (libraries, provost offices, etc.).
 - » Across institutions and systems to create and maintain resources over time.
 - » Across members of open education networks to increase sharing of information.

Infrastructure

- Participants said the field should develop an open education peer-review process that is valued as much as the peer review process used by publishers.
- Participants felt the current repositories for OER need streamlining. They felt there are too many; that it is hard to keep up with all the “central places’ or ‘platforms’ for sharing and posting resources.
- Participants felt there is a need for supporting infrastructure district-wide and state-wide to help scale OER.

Research

- Participants discussed the need for more research to demonstrate the pedagogical benefits of OER and its impact on learning-- Do students learn more or better? Does open education make a real difference? They felt without such proof or evidence, it is hard to make the case for open education to the key decision-makers.



One of the key things to demonstrate is the benefits – cost, pedagogical, whether students learn more or better. Without proof or evidence on the benefits, it’s going to be hard to build momentum.”

➤ **How can we ensure that those who are interested in, or may be best served by, open education have a meaningful and permanent place in the open education field?**

Participants focused on faculty and other institutional stakeholders when discussing how to ensure that all who are interested in and served by open education have a stake in the field. Key action areas included building awareness and improving communications, undertaking effective change management, and making changes to institutional policies related to tenure, release time, and compensation to take open education activities into account.

Awareness and Communication

- Participants would like to see awareness and information campaigns continue, especially those that target students and faculty. Students may not know they are using OER; more faculty might be interested in OER if they knew about it.
- Help people recognize when they may already be doing similar activities to curate and create learning materials and give them the name for it (and the license!)
- Better messaging is needed to connect the work of OER to solving the real problems in higher education related to enrollment and retention.



Change needs to happen at a systemic level to ensure that the work is adequately supported and the people who are doing open education work are recognized and compensated.”

Change Management

- Participants felt effective change management is needed to sustain OER.
- Open education change efforts should focus on education graduate students who will be the teachers and faculty of tomorrow. Ensure they are exposed to and engaged with OER.
- Do a stakeholder analysis and consider what is important to each stakeholder group, develop different strategies accordingly.

Compensation and Incentives

- Participants said institutional policies for tenure and promotion should be tied to open education activities.
- Participants felt it was important to recognize and compensate those who are doing the work.

Additional Barriers

- Participants felt additional barriers that prevent people from taking part in open education need to be removed. These may relate to finances, limited time and resources for open education, and location (For example rural areas have limited tech infrastructure to support open education).

► **How can we ensure that all stakeholders have influence over the types of resources available, research, and policies in the field?**

Participants discussed the need for greater inclusivity in every aspect of the field, and for more proactive and deliberate outreach to bring new people and different perspectives into the work. The following actions were discussed:

- Put together teams to tackle OER initiatives that are as inclusive as possible. Do proactive outreach to get new and different perspectives on the work.
- Give a deliberate invitation to those who are not currently engaged to join these conversations; don't wait for them to come to you.
- Be transparent about the work—who is on the team, what type of work is being done—so that others can see themselves in the work.
- Listen to those who are using the resources (i.e., faculty).
- Include students in the research; ask them what matters to them most.
- Think critically about who is not currently being served by OER. For example, special needs students and nonstudent; stop thinking of open education as something just for students (open education can be used by all).
- Participants also noted there is a need for a more supportive policy environment. They discussed a community-based approach where community can co-create future OER.



People need a deliberate invitation to join these conversations.”

DIALOGUE DAY #2: LEADERS OF HBCU OER INITIATIVES

The Dialogue Day with leaders of HBCU open education initiatives was conducted on December 16, 2020 via Zoom. The thirteen participants represented 4-year institutions (11) and community colleges (2). Respondents' roles at their institutions included faculty, administrators, and managers or directors of centers and special programs. See attendee list in Appendix A and research protocol in Appendix B.

The Dialogue Day with the leaders of HBCU open education initiatives followed up on their responses to the online survey. Areas that required deeper exploration and understanding included their views about the needs of their stakeholders and the field, the need for new networks, support and advocacy, and the vision and future direction of the open education field.

The following five questions were posed to the group:

- *What would be of greatest value to your members and stakeholders?*
- *What would you need to increase awareness of and support for your work among your institution's leadership?*
- *What kinds of new networks does the field need?*

- *How can we ensure that those who are interested in, or may be best served by, open education have a meaningful and permanent place in the field?*
- *What is your future vision for open education (10 years from now)?*

Summary of Discussions

► What would be of greatest value to your members and stakeholders?

Participants discussed what would be of value in the context of existing barriers for their members and open education stakeholders. Participants focused on misperceptions about quality, the need for OER institutional policies for tenure and promotion and compensation for faculty time that take work with OER into account, and the need for culturally responsive content and more course materials that would be highly valued and supportive of faculty adoption, creation and use of open education resources at their institutions.

OER Quality

- The conversation kicked off with a discussion about misperceptions of faculty around the types and quality of OER available. Participants specifically mentioned that faculty in quantitative and technical courses are skeptical that there is sufficient OER available for them, and another participant added that misperceptions about quality generally is an issue: if something is free or low cost it must not be high quality.

Course Materials

- Participants said it would be useful for faculty to have open education course packages that include all the ancillary materials (i.e., PowerPoint, homework platforms, foreign language practice modules, etc.). There is competition to source open education from publishers who currently provide whole course materials.
- Participants said there is a need for culturally responsive materials for open education. It is a struggle to find culturally responsive materials in existing OER repositories, like MERLOT. Several participants noted this is an area where the HBCUs could take a leadership role and use their own scholars to contribute OER that are culturally relevant and on topics like social justice and diversity.



Shame on us, because people are digging, and when they are going to Google, they should be coming to us. And yes, we need people to create, but we haven't even jumped in on what we can do right away. OER should be just buzzing with diversity, equity, access."

Institutional Policies

- Participants believe that new tenure policies and promotion review processes that include open education activities would immediately increase open education adoption and use by faculty.



If we could get our institutions to recognize OER as a scholarship initiative, that if you have a faculty member using, contributing, developing that helps with tenure promotion scholarship, you will see a significant and instant jump and using our resources.”

- Participants said funds to support release time would make it easier for faculty to create open education material for their courses. With heavy teaching loads, it is difficult for faculty to carve out time to contribute to adopting, revising, or creating materials. Several participants noted

funds are essential to support release time for faculty to do the work required. Participants noted the COVID-19 pandemic has put acute pressure on faculty. OER is a lower priority due to time needed to convert courses online.

► **What would you need to increase awareness of and support for your work among your institution’s leadership?**

Participants believe their institutional leadership is supportive of open education and understands the benefits, especially for students. However, respondents said they would like to cultivate more support for OER from outside their institutions. Participants discussed engaging community partners such as NAACP and the Urban League as potential collaborators in advocating for open education with leadership at the local and state level.

Several participants noted that developing a comprehensive multi-year strategic plan for OER initiatives and engaging their community partners in that plan would move the work forward.



Faculty are teaching three to four courses, and this was prior to the pandemic. The time for development has to be supported. I know that people are interested in OERs but having the time to engage with a working group and within divisions and departments across departments to cultivate shared resources is critical.”

► **What kinds of new networks does the field need?**

Rather than add new networks, participants believe they can make better use of existing networks and broaden awareness and use of its resources. Participants feel that there are opportunities for more intentional and deeper partnerships with other networks in the open education field.

Develop Existing Networks

- Participants noted first that their own network (of HCBUs) needed more development. They would like to expand their HBCU portal and include resources from every HBCU in the country, a showcase of sorts.

Broaden Partnerships

- Participants discussed engaging existing open education networks or groups more proactively, instead of adding new networks. Examples include the HBCU Librarian Alliance and the Atlanta University Center Consortium, which is a partnership between Morehouse, Spellman, and Clark Atlanta University.

- The colleagues in Atlanta noted that they already have strong relationships between the three institutions that could tap to expand the conversation about open education. The third network noted was the White House Initiative on HBCUs-- participants wondered why OER wasn't a topic of conversation for that initiative.

➤ **How can we ensure that those who are interested in, or may be best served by, open education have a meaningful and permanent place in the field?**

Engage Students

- Participants believe engaging with students is most critical, as they are the primary beneficiaries of OER. Participants discussed several strategies to ensure students play a central role in the field, including working with student government associations, inviting students to participate on OER committees, conducting workshops for students, and providing incentives for students to participate.

Strong Marketing

- Participants felt there could be stronger marketing and awareness-building efforts for OER and the open education field among those who can benefit from its resources and services. The field could publicize the benefits of OER in the trade press (Chronicle of Higher Education, Higher Ed Digest). They stated that more data and evidence from researchers are needed to back up the marketing.



All of us come from a campus that has some part of history on something. All of that should be highlighted in open education resources for the HBCUs. I would like to see every school showcase and add to the collection of what's going on and what they're noted for."

➤ **What is your future vision for open education (10 years from now)?**

Participants discussed their 10-year open education visions in practical terms related to cost savings for students and centralized web-based resources for greater ease and access to OER for stakeholders.

Cost savings for students

- One vision for the field is that students would not have to purchase any course materials in the first two years of their undergraduate degree. It was noted that this would require additional support and incentives. Participants felt that this could be achieved by sharing the load across institutions and working collaboratively to develop shared test banks and other materials.

Ease of access to OER

- Another vision for the open education field includes a new portal for all the existing OER materials. Participants described a central source that would be as user friendly and as engaging as Netflix, where materials are organized in a dashboard by discipline and easily searchable. Participants felt that OER can be found in so many places now that it's overwhelming for faculty.

DIALOGUE DAY #3: LEADERS OF K-12 STATE AND DISTRICT OER INITIATIVES

This session was conducted on January 6, 2021 via Zoom. The twelve participants represented state departments of education, #GoOpen state networks and #GoOpen district networks including ambassador districts. See attendee list in Appendix A and research protocol in Appendix B.

The purpose of a Dialogue Day with K-12 regional and state networks was to gather more information from K-12 stakeholders to inform the evaluation. The Dialogue Day with leaders of K-12 regional and state networks posed questions related to the open education value proposition for the K-12 sector, open education decision makers, unmet needs of stakeholders and the field, diversity, equity, and inclusion, and the vision and future direction for the open education field.

The following eight questions guided the discussion with leaders of K-12 state and district OER initiatives:

- *When you advocate for open education in your state or district, what benefits are you describing? What problems does open education solve for K-12 educators?*
- *Who is most influential in the decision to adopt OER in your districts and states? Who else is involved in the decision-making process? How do you coordinate with each other?*
- *Where and with whom have you been most successful in advocating for open education? What have been some of your challenges?*
- *Are OERs generally being used for whole courses/curriculum, or more supplemental?*
- *What types of networks do teachers and school leaders in your community go to for support and professional development generally?*
- *Is increasing diversity, equity, and inclusion a goal for your state or district? If yes, how have you been working on this? Have your efforts with OER been a part of those discussions? Do you see open education addressing those goals/needs in your states/districts?*
- *What does the open education field need in order to have the greatest impact and sustained success in the future for K-12 education?*
- *What is your future vision for open education 10 years from now?*

Summary of Discussions

► **When you advocate for open education in your state or district, what benefits are you describing? What problems does open education solve for K-12 educators?**

Participants described the value proposition of K-12 open education as cost savings/shifting for districts and schools, equity and greater access to high quality content and content aligned to standards for students and teachers, and increased collaboration and sharing across districts. Participants highlighted these benefits:

- Cost “shifting” of funding in ways that support teaching and learning, as opposed to the purchase of content.

- Cost savings from not reinventing content.
- Equity and access to high-quality instructional materials, regardless of school location.
- Localization of content and ability to provide different perspectives from different resources.
- Alignment of content to academic standards.
- Increased collaboration, curating, and sharing of resources across districts, spurred by the pandemic.
- Mitigate staff turnover as teachers are more invested in content creation and adaptations.



What we are finding specifically for social studies, is that we are collaborating with other districts to curate our own materials....and have found the benefits of having our different districts come together to curate those materials...”

➤ **Who is most influential in the decision to adopt OER in your districts and states? Who else is involved in the decision-making process? How do you coordinate with each other?**

Overwhelmingly, participants stated that while state departments of education can provide guidance, resources and an outline of benefits, the



...when (districts) take that money and invest it in your staff, they become bigger owners of the curriculum, they invest more in what the district is doing, and they feel empowered...”

decision is made at the district level (many participants were from local-control states) and the district’s curriculum director is a key decision-maker. However, having guidance at the state level provides an added layer of validity to districts when speaking to their local school boards about open education.



...we provide guidance at the state level and can certainly outline benefits and provide resources. But ultimately, the decisions are going to be at the district level.”

Participants said it was important to have teachers on board and a district leadership team

(#GoOpen) that included teachers and championed the process. Teacher buy-in is key to spread the word and amplify adoption.

Having someone dedicated to OER outreach or some state-level support to serve as “connectors” to bring districts together was cited as important in efforts to coordinate with each other. Microsites that provide a central place for information, resources, and sharing of information would also help increase coordination.

➤ **Where and with whom have you been most successful in advocating for open education? What have been some of your challenges?**

In responding to this question, participants did not address advocacy successes; rather, they cited their biggest challenges with open education:

Awareness and Understanding

- Getting people to understand OER.
- The need for more awareness and information around the copyright process and how it works.
- Better messaging, with infographics to clarify and simplify complex information.
- Countering the notion that if something is free and digital it is open education.

Free Equated with Low Quality

- Perception of cost vs. quality > district leadership often thinks you must pay for something that is high quality and standards/state curriculum aligned.



There's that sense with teachers that you get what you pay for...and so teachers are fussy about whether it really quality and yet we have a hard time proving that its quality unless they use it.”

Shift from Development to Adoption

- Shifting the focus from development of open resources to adoption of open resources and communicating how adoption of OER falls on a spectrum (supplemental resources vs. whole curriculum) depending on district needs.

Data Needs

- One participant noted that they are working gathering more data and performance metrics for resources including user comments, ratings, and metrics to see how often a resource has been downloaded.

➤ Are OERs generally being used for whole courses/curriculum, or more supplemental?

Supplemental

- Most participants said OER are used in a supplemental manner. The OER that have been curated are more supplemental than continuous. Participants said that ideally, they need sequenced continuous curriculum.

Full Course Model

- Some districts are leaning into the full course model and taking advantage of more continuous resources and 3rd-party reviewers to find resources. In Arizona, some CTE programs have full-course curriculums that have been adopted by districts for larger programs, while smaller programs leverage supplemental resources. The main challenge with CTE relates to skills-based lessons.

► **What supports do you need to help you move your work around open education forward?**

The main themes identified in terms of what support is needed to help move participants' open education work forward are interoperability, advocacy, and policy,

Interoperability

- Systems and technology used for OER must operate together. Interoperability is critical for greater ease and access to information related to open education.
- A single integrated platform to create, curate, deliver and report on open education resources is needed.
- Districts and teachers are working with different systems that capture different data points and are not integrated.

“

I would echo the interoperability piece as well...the ease of use of letting teachers use these resources and have the assessments attached and make it all part of everything that they are already doing.”

Advocacy

- Greater advocacy and lobbying by a neutral party for K-12 open education is needed at the state and national legislative level. It was noted that publishers have lobbyists working with legislators on their behalf.
- Increased access to legislators is needed not only to educate them about the benefits of open education, but also to inform policy decisions to drive adoption.

Policy

- More state-wide model policies are needed for other states to look to as examples.
- More model policies or legislation are needed for districts to reference and adopt to help sustain these efforts on an ongoing basis.

“

I didn't realize how big of a lever policy was going to be, and it turns out that was one of the biggest barriers that districts had when they were thinking about adopting OER – was that it wasn't written in their policy...a model policy in that respect was really helpful.”

► **What types of networks do teachers and school leaders in your community go to for support and professional development generally?**

There was not much discussion around this question. Many participants may be unaware of where educators go for professional development, or they may be unaware of networks that provide these services. However, a few resources are noted:

- Regional Educational Service Centers as a resource for district professional development opportunities.
- INFOhio provides learning pathways and curriculum, and train the trainer programs for Ohio districts.
- North Carolina has established several teacher training programs around multiple topics.

► Is increasing diversity, equity, and inclusion a goal for your state or district? If yes, how have you been working on this? Have your efforts with OER been a part of those discussions? Do you see open education addressing those goals/needs in your states/districts?

Overall, participants said diversity, equity, and inclusion are important goals for the state or district, but for the most part there have not been significant efforts to advance DEI. Several participants noted that DEI is not a priority at the state level, although they stated it should be.

DEI may be incorporated into the mission and vision statements of an organization, or committees and advisory groups may be formed to address DEI. However, it was difficult for participants to cite specific examples of actions that advance DEI.

Some participants cited efforts to provide professional development around culturally relevant teaching practices to teachers within their states, either as workshops or as an ongoing process.



This is part of our department’s mission and vision...but the conversation has not gotten very far...at the state level.”

► What does the open education field need to have the greatest impact and sustained success in the future for K-12 education?

Participants identified several areas of need for the field to have the greatest impact: Interoperability of platforms, open education lobbyists and advocacy at the state and local levels, pre-and in-service teacher education and training for OER. These areas align to what participants stated their own open education work needed to move forward:

- Integration and interoperability for ease of use across platforms.
- Lobbyists at the state level combined with support at the local and district level to address the issue from both sides.
- Incentivizing districts that are adopting OER by providing funding based on % curriculum that uses OER.
- Targeting pre-service teachers that are knowledgeable of and aware of OER to ask the questions and push the issue at the district level.
- Teacher education component to increase their awareness and understanding of OER.
- Systemic changes to enable teachers to have the time to curate and develop OER proactively as opposed to reactionary (as during the pandemic).

► What is your future vision for open education 10 years from now?

The discussions of the 10-year vision for open education dealt with teachers feeling greater agency when using open education, and with open education helping to create more personalized learning. In addition, the vision for open education would include open education as a more integral part of education and as the default choice when ordering classroom materials:

- Teachers are more confident in themselves in using open education.
- Open education supports personalized learning experience for all students.
- OER is the first choice of materials, as opposed to another traditional purchase order.
- Education is viewed holistically with open education fully integrated. open education fits into the larger education

DIALOGUE DAY #4 AND #5: LEADERS OF OPEN EDUCATION NETWORKS

As an extension of the formative evaluation, an additional two-part Dialogue Day series was held in March 2021 with open education network leaders to review the findings of the evaluation and to share plans and discuss diversity, equity, and inclusion (DEI) in their work and the open education field. The impetus for these Dialogue Day sessions arose out of conversations during the evaluation in which open education leaders shared their self-reflections about DEI in their networks and the field, and their desire for greater sharing of plans and collaboration across networks.

The first Dialogue Day focused on sharing the draft of the evaluation of open education networks and the open education field that edBridge had been conducting over the past several months. edBridge provided a presentation of the findings, followed by a discussion with the group. The second Dialogue Day focused on the strategic plans for the participants' networks and specifically how the networks are contributing to diversity, equity, and inclusion in the open education field. Our goal was to arrive at a set of learning questions with respect to networks, and the collective work among networks, to move forward in this work.

The purpose of this Dialogue Day series was to:

- Share findings and recommendations from the draft of the formative evaluation final report and preview the network mapping and visualization tools.
- Share plans and discuss diversity, equity, and inclusion within open education networks and the field.
- Learn how the Hewlett Foundation can best support its grantees in their DEI, racial equity, and social justice work.

The Dialogue Days were conducted via Zoom and first session was held on March 16, 2021 and the second session was held on March 25, 2021. We had 15 attendees in the first session, and 16 attendees in the second session.

Summary of Discussions

Dialogue Day: March 16, 2021 - Review Formative Evaluation and Mapping Tool with open education Network Leaders

For the first Dialogue Day, findings and recommendations from the formative evaluation report and the open education mapping and network visualization tools developed were shared with participants for review and comments.

Mapping of the Field and Connections Between Network Memberships

The participants' discussion and questions during the first session focused primarily on the mapping and visualization tools and analysis of the membership overlap in the open education field as depicted in kumu.io. Following the session, access to the mapping tool was provided to participants to explore and interact with to determine its utility and value for their work.

Participants found the visual representation of connections between and across networks interesting and thought-provoking. They noted the lack of connections between networks with higher education memberships and the K-12 networks and to the HBCU network. There was discussion about how these connections might be strengthened, and about who is not represented on the map, and, by inference, which communities are not currently engaged in the open education field.

Review of Evaluation Findings and Recommendations

Major findings from the formative evaluation of open education networks were shared with participants. Participants felt the findings and recommendations represented their input and responses to the evaluation survey and interviews.

Dialogue Day: March 25, 2021 - Diversity, Equity, and Inclusion in Open Education Network and the Field

During of the second Dialogue Day session, participants were asked to share their strategic plans and activities specific to diversity, equity, and inclusion (DEI) and to discuss social justice and racial equity and the implications for the open education field.

The purpose of the session was to:

- Help open education leaders gain a better understanding and more comprehensive view of DEI activities planned and underway within their colleagues' organizations and the field.
- Provide a space and format conducive to an open conversation about DEI.
- Begin to develop a set of learning questions to explore in subsequent sessions.
- Help the Hewlett Foundation best support grantees in this area.

In advance of the session, participants were asked to share their strategic plans and/or complete a template about diversity, equity, and inclusion in their networks to help frame the discussions (see APPENDIX D). edBridge

synthesized this information and reported the results in the aggregate to the participants.

DEI Definitions

In advance of the second session, participants were asked to provide their definition for the concepts of diversity, equity, and inclusion. Following is a summary of their responses:

Participants defined Diversity broadly to include differences in demographic and psychosocial characteristics including:

- Race, gender, ethnicity, socio-economic status, nationality, age, religion, disability status
- Differences in learning styles

Participants defined *Equity* as meaning:

- Fair and just
- Dismantling barriers for underserved students and populations
- Access to same opportunities
- Remediating economic inequity

Participants defined Inclusion as:

- Welcoming, sense of belonging, being valued
- Participation in decision-making
- Sharing of power
- Inclusive of different languages and culture
- Affordable, accessible, adaptable learning resources

Participants had distinct definitions for each term and did not group diversity, equity, and inclusion under one broad definition of DEI.

Summary of Information from DEI Strategic Plans and Template

The following presents the synthesis of information provided in the plans and template for DEI activities.

➤ Has your network identified a specific set of goals around diversity, equity, and inclusion?

The two major areas for goals focused on improved communication and increased diversity of network membership, institutions, and professionals in the field:

- Raise awareness and communicate the relationship between DEI and open education.
- Better articulate how open education is grounded in social justice.
- Increase diversity of member institutions.
- Redefine membership and member commitments.
- Increase the number of BIPOC (Black, Indigenous, and people of color) open education professionals.

Following are examples of specific, measurable goals around diversity, equity, and inclusion that were shared by network leaders:

- Improve representation by 20% for underrepresented groups in authorship and institutional partnerships identified in organizational data analysis.
- Reduce identified gaps in hiring, retention, and promotion by 20% for underrepresented groups that are identified in organizational data analysis.
- Improve organizational climate (sense of trust, safety, and belonging) across groups to 4 out of 5 on a Likert scale.

➤ **What activities have you organized in the past as a network to advance your work around DEI?**

Participants' past activities related to DEI fell into two categories: Those that were internally-directed and those that were externally-facing.

Internal:

- Invested in training, audits, surveys, consultants,
- Conducted organizational health assessments around equity.
- Eliminated barriers to membership.
- Diversified board.
- Designated workdays and times to equity and anti-racism work.

External:

- Held DEI focused convenings.
- Offered scholarships for BIPOC professionals.
- Served as a connector and catalysts between groups.
- Supported BIPOC-led initiatives.

➤ **What activities do you have planned in the next year or two as a network to advance your work around DEI?**

Planned activities include:

- Equity Summits
- Race and equity leadership academy
- Stronger code of conduct for events
- Guide to publishing accessible OER
- Equity professional development and toolkits
- Faculty Fellows program
- Curriculum for social justice

Dialogue Day Discussion

The second segment of the Dialogue Day focused on diversity, equity, and inclusion. The discussions were guided by a set of questions. The summary of discussions are provided below.

➤ **What would it look like and feel like to deepen work on equity and inclusion in your organization and/or in the field?**

Internal and External Work

The work on equity and inclusion is divided into two parts: Internal and external. Internal work is critical because without understanding one's own perceptions and biases, they likely are being extended out into the community. Many open education network leaders and staff are examining their biases and beliefs and sharing experiences around race and equity. It is important to build trust among the team to have difficult conversations around DEI. This is not a one-time activity, but rather an ongoing effort at the core of their work.

The external approach is to empower others to create and share their work; to bring new voices and members to the networks and field; and to continue conversations with diverse communities to better understand each other's cultures and needs.

Mission Critical

Some participants have made a change to their organizations' mission statements to explicitly state that the purpose of their open education work is to create equitable and inclusive learning environments that will contribute to the creation of a more just society.

Power Shifts

To achieve real diversity and equity in the open education field, some envision major power shifts where new groups and underrepresented constituencies, such as BIPOC institutions and communities, are the decision makers.

Inclusion and Belonging

Inclusion implies a sense of belonging - to be able to open up and share with the group. DEI work is not a short-term solution. Therefore, it is important to create a sense of belonging and environment where people can see themselves within the open education community.

User Experience Culture to Equity Culture

An organization steeped in a culture based on the user experience can build an equity culture around that. User experience research can be leveraged to bring in additional voices and perspectives and determine partners for the work. Organizations can partner to tap new capabilities to take the expertise of others and bring that into the work.

➤ **How are you and your colleagues continuing to learn and integrate DEI into your network?**

Network Improvement Community

A network improvement community model provides for continuous input from a user community—networks learn what is relevant, what's missing;

where there are gaps in content, and what users would like to see fill those gaps. In developing resources, continuous feedback is provided to the community developing content. It may be necessary to fund or pay for content development created in this way to advance DEI, without reproducing old power dynamics.

Students as Creators

Students can be more engaged, in terms of both contributing to content creation, and specifying what type of content or context would be most helpful to their learning. Bringing students in, not only as curators of the materials, but also creators of materials and contributors to the process. Giving students agency: what do they think should be part of their course materials, what would they like to bring in, that is a key component of open pedagogy and should be a big part of producing anti-racist materials.

Math Equity Toolkit Example

Education Trust West developed the Math Equity Toolkit for middle schools. The toolkit engages curriculum developers, teaching faculty, and other learning specialists. Schools can adapt this model, where teachers participate in learning communities to reflect on their biases and how they can improve math education for students, particularly underrepresented students.

► What is needed to support creation of open education content that resonate with diverse audiences?

Create the Taxonomy

It is important that members of under-represented groups have the ability and opportunity to create the taxonomy for their content and libraries. They decide how to organize the knowledge base of the community and determine what topics should be included. Creating the taxonomy of the library helps communities develop consensus around what should be the categories for their work. The community can then see how their knowledge and content can fit into that framework.

Create Locally Relevant Content

Participants want to see a shift from educators and practitioners as consumers or users to active creators and adapters of OER. A top-down model for open education that came out of initial efforts to create large quantities of OER content for the field is not a model that is inclusive, or inclusive enough.

DEI can be integrated into networks and the field through open educational content that is relevant to and created by diverse communities and students. This content needs to be locally generated to serve local education needs. As an example, open education organizations' editorial departments can work with advocacy organizations to ensure that the content is representative.

► **Are there places or communities that we want to work with and learn with in a deeper way?**

Analyze Who Is and Is Not Connected to your Network

Network leaders suggested analyzing who is connected to or participating in their networks and who is partnering with their networks, and, by contrast, who is not engaged with their networks. Rather than choose friends from their ecosystem, they suggested intentionally reaching out to new foundations, governments, or education institutions.

Global Perspective of DEI

Diversity can be advanced from a global perspective, as opposed to a national or regional perspective. DEI is not defined by only North America. The open education community can extend its reach to be more diverse and expand the field, expanding into new geographies, new countries, and adding new partners.

Different countries can take ownership over what DEI ought to look like in their area. The field can explore what DEI means in other parts of the world and provide OER to address the needs of those communities and users. Global organizations should make special efforts to engage with new countries and help groups set up open education country chapters. Ideally, these efforts would help create a more diverse and inclusive field and expand the open education movement.

Unengaged Groups

Communities currently outside open education may have different issues and problems to solve, and open education may not be a priority. These communities may not have an allegiance to an open philosophy. Open education leaders can reach out, meet them where they are, and help address the issues they care about first. Let “open” take a backseat for some of their work and focus on building relationships.

► **What action items can those of us who have benefited from the system and are in leadership positions take to promote conversations and change for equity and social justice in the open education field?**

Talking with institutional leadership about the values of open education aligning directly with social justice is a key part, if not the most important part, of the conversation.

“

The first step is recognizing what resources and privilege we have and putting that toward the existing networks and organizations doing this work (DEI, social justice), and supporting that work in the way that they want to be supported; not trying to impose our ideas of what we think it should be and not attaching conditions to it.”



To produce OER without reproducing power dynamics that are counter to DEI requires structural work, professional development activities, and advocacy for changes to promotion and tenure policies, and for public grants to include open license requirements on products that are produced with public monies.

The logistics work in the trenches never ends. But the more thoughtful that we can be about how to structurally get that into the core processes of the systems that we work in with government and with institutions in particular, the better off we're going to be in the future. If the next generation of teachers understands that open education is well aligned with social justice, then to the extent that they're getting involved with social justice in parts of their career, open education might be something they bring along with them.”

The more thoughtful network leaders can be about how to embed open education into the structures and core processes of systems in government and institutions, the better open education will be in future.

For example, HBCUs that have integrated open education

into their institutions can mentor or guide other HBCUs to adopt open education.

Public Speaking Engagements and Events

Open education leaders can share opportunities and advocate for BIPOC and representatives of underrepresented communities to present at conferences, webinars and communication forums based on their areas of expertise and perspectives about open education--not only on topics related to diversity or culture. The Open Education Leadership Program is an example of a program that empowers and teaches people how to use leadership skills in open education.

Global Events

For global events, leaders suggested using multiple hosts spread across multiple time zones. Spread the whole program of the conference across all time zones to make it possible for anyone to participate in live activities, no matter where they are in the world.

At global conferences, hold sessions in all six of the UNESCO official languages. Move away from an English only format to be more acknowledging of different languages. These are all strategies OE Global will employ this coming year.

➤ How can we provide open education resources without reproducing or reinforcing power dynamics that might run counter to the principles of diversity, equity, and inclusion?

Traditional Systems Built on White Privilege

There was a great deal of discussion about how to bring OER more deeply and broadly into education institutions and reach more diverse audiences within traditional systems that were built on a culture of white privilege and supremacy. Academic and research libraries make up a large segment of open education networks' membership and are part those systems. Participants said they struggle with finding ways to advance open education work without perpetuating that power dynamic.

Higher education institutions are also struggling with how to advance DEI on their campuses. Participants spoke of positioning OER to those in power as a means to advance and meet broader institutional DEI goals for teaching and learning.

When looking at social justice strategies, these must be very specifically articulated in open education and strategies need to be created specifically around DEI. Social justice is not inherent in OER. Open education can create the same conditions of inequity that are found in higher education. There are more research universities and white people in OER than there are people of color, both as creators and users.

Participants spoke broadly about what steps are needed to critically examine the system, dismantle it, and rebuild it with diversity, equity, and inclusion at the core.

Empower Others

Participants believe their main goal is empowering others and that can help shift the power dynamics.

Diversify Editorial Boards

Participants noted that many editorial boards are not diverse yet have the power of deciding what content and what topics make it through to be publishable to the world. Participants acknowledged the difficulty BIPOC communities and authors have in publishing through traditional commercial publishers, and the challenges in gaining approval of editorial boards. Open education resources have the potential to allow the work and voices of BIPOC to come forward in an open forum. One way to achieve this is to invite and empower HBCUs to serve as an editorial board for African American and Black materials created by Black authors.

Tenure and Promotion Policies

Participants felt that one way to support BIPOC communities would be to continue to promote OER scholarship and publishing for consideration in tenure and promotion policies within higher education institutions.

➤ We know that racism is ingrained at both the systemic and individual levels. On the individual level, we keep hearing about the importance of “doing your own work” to understand and advance racial equity. What does it look like to do your own work?

Participants said they:

- Actively listen to people of different races to understand their culture, views, and needs.
- Are willing to be wrong when their biases are challenged.
- Read books by diverse authors to better understand their perspectives and experiences.
- Attend bystander training to understand what to do if you witness someone being racist in your community or family.
- Ask first what they can do better and how they can be most helpful.
- Are inquisitive until trust is built.

- Cross code to understand where it is safe to show up authentically.
- Are aware of self-critical voices that can interfere with being open to supporting others.
- Push employers on hiring and evaluation processes that may exclude populations.
- Use professional time to think about how structures and processes impact DEI.

► Recommendations

Participants felt these kinds of discussions were valuable and helpful and would like to continue the conversations. Uniformly, open education leaders believe there is a need to do more DEI work and would like to have time and space to discuss DEI with their colleagues.

Future sessions may focus on the following areas of learning:

How Do We Measure Open Education Success and What Are Relevant Markers of Open Education Progress?

Examine how open education outcomes and success are measured and what is being funded. These are indications of what is seen as important and what are acted upon in the field.

- Involve network leaders in the development of Hewlett implementation markers for the open education strategy.
- Gain feedback on how markers are defined and represented.

How Do Different Individuals Connected to Networks Experience OER?

Participants are interested in listening to others' experience with OER in their ecosystems and hearing from individuals connected within their networks.

- Expand the configuration of people in discussions beyond network leaders to include more diverse voices to deepen the work on DEI and promote a sense of belonging in the open education field.
- Provide a forum to hear directly from different people in the ecosystems who have created or used OER: How do they describe their interactions with networks and the field? How are they using OER? Do the resources work for them and their communities? What resources are important? Where has open education been successful and in what way was open education successful?

The Complexity of Multilingual Inclusive Dialogues

Language can be an indicator of exclusion. Open education events and discussions can be exclusive if they are only in the English language.

- Encourage global organizations to experiment with offering their conferences and convening in multiple languages and time zones to promote inclusivity and equity.
- Have network leaders share their experiences and expertise in advancing open education dialogues in multiple, native languages. (For example, changing technology to UTF-8, using simultaneous translation, and captioning services.)

- Arrive at solutions that enable global organizations to produce multilingual inclusive dialogues and events throughout the field and world.

At the end of the session, participants agreed that these conversations were helpful and valuable, and that there would be benefit in coming together again to explore specific areas of learning described above.

APPENDIX A: PARTICIPANT LIST

A. Attendees of the #OpenEd20 Conference (November 12, 2020)

- Apurva Ashok, Rebus Community
- Angela DeBarger, Hewlett Foundation
- Stephen Downes, National Research Council Canada
- Sarah Hammershimb, Athabasca University
- Brian Hickam, Indiana Tech
- John Hilton, Open Education Group
- Laura-Beth Larsen, Central Lakes College
- Cailyn Nagle, US PIRG
- Niki Nguyen, Bunker Hill Community College
- Wilhelmina Randtke, Florida Virtual Campus
- Lora Redwine, Chemeketa College
- Ethan Senack, ISKME
- Fred Stemple, Garrett College
- Karrin Thompson, CommonLit
- Jocelyn Tipton, University of Mississippi
- Eric Werth, University of Pikeville

B. Leaders of HBCU OER initiatives (December 16, 2020)

- Effau Ampadu, Tennessee State University
- Deborah Chisom, Tennessee State University
- Monique Earl-Lewis, Morehouse College
- Andrew Lee, Fort Valley State University
- Jean-Jacques Medastin, Edward Waters College
- Robbie Melton, Tennessee State University
- Karen Nichols, Xavier University of Louisiana
- Marvin Reid, Central State University
- Eula Todd, Lawson State Community College
- Rona Tyger, Dillard University

C. Leaders of K-12 State and District OER initiatives (January 6, 2021)

- Pam Batchelor, North Carolina Department of Public Instruction
- Tammy Bonner, Pima JTED Career and Technical Education District
- Douglas Casey, Connecticut #GoOpen State Network
- Erica Clay, INFOhio
- Gayle Galligan, Deer Valley Unified School District, #GoOpen Ambassador District Network
- Sam Kong, Wisconsin Department of Public Education
- Lori Lee, INFOhio
- Gina Loveless, Michigan Department of Education
- Barbara Soots, Washington #GoOpen State Network
- Jean Weller, Virginia #GoOpen State Network
- Jeanette Westfall, Liberty Public Schools, #GoOpen Ambassador District Network

D. Leaders of Open Education Networks (March 16 and 25, 2021)

- Nicole Allen, SPARC
- Amanda Coolidge, BCcampus
- Kevin Corcoran, Driving OER Sustainability for Student Success (DOERS3)
- Una Daly, CCCOER
- David Ernst, Center for Open Education
- Cable Green, Creative Commons
- Gerry Hanley, MERLOT and SkillsCommons
- Meredith Jacob, Creative Commons USA
- Al Kuslikis, AIHEC
- Hugh McGuire, The Rebus Foundation
- Robbie Melton, HBCU AL\$ Network
- Lisa Petrides, ISKME
- Richard Sebastian, OER Degree Initiative, Achieving the Dream
- Tanya Spilovoy, WCET
- Paul Stacey, Open Education Global
- Daniel Williamson, OpenStax
- Katherine Fletcher, OpenStax

APPENDIX B: RESEARCH PROTOCOLS

A. Protocol for Dialogue Days with #OpenEd20 Conference Attendees

Introduction

Hello, I am _____, of edBridge Partners, and I am joined today by my colleagues _____, also of edBridge Partners. edBridge is an education management consultancy, and we work with foundations, institutions, systems, and associations across both higher ed and K-12 on strategic and executive initiatives and projects.

This session is [Perspectives on the Open Education Field: Current State & Future Vision](#). We are really pleased to be facilitating this session today. This session is part of a formative evaluation we are conducting for the William and Flora Hewlett Foundation. This evaluation is seeking to understand how and to what extent existing open education networks are serving the needs of the open education field, how the field is evolving as it matures, and how we can continue to ensure that the field is diverse and inclusive.

We are joined by Angela DeBarger, Program Officer for the Hewlett Foundation.

The objective of our session is to have a rich dialogue with all participants and to really encourage active listening. Each person here today brings a unique perspective, life experience, and expertise to the discussion about open education. We want you all to have an opportunity express your opinions, listen to the voices and experience of others involved in open education, and learn and grow from the conversation today.

We will be adhering to the code of conduct published by OpenEd and we encourage and expect the following behavior:

- Be respectful, inclusive, and accepting of others. Actively seek to challenge your personal biases, assumptions, and preconceived stereotypes, and approach differences with openness and curiosity.
- Be conscious of how your words and actions (including unintentional ones) might harm others. Take time to educate yourself on how to be more inclusive and listen when someone takes the time to educate you.
- Be aware of privilege and power dynamics. If you find you are talking or commenting a lot, consider stepping back to leave more space for others. If you share the work or ideas of others, give credit where it is due.
- Be considerate of privacy and personal boundaries. Give others a chance to “opt-in” to personal interactions, and respect limits when they are set.
- Be constructive in offering criticism and be gracious in accepting it. Consider “calling in” rather than “calling out,” and direct critiques toward ideas rather than people.

At this point we are going to divide into 2 breakout rooms now, you will be moved automatically, please stand by. Move to breakout rooms.

- Reintroduce yourself
- Ask everyone to introduce themselves in the chat – full name, title, and organization/institution.
- Prompt them to introduce themselves live before they speak.
- Remind them that we really want this to be a conversation between the people in the room and we are just here to facilitate.

Questions

- What does the open education field need to do to have greatest impact and sustained success in the future?
- How can we ensure that those who are interested in, or may be best served by, open education have a meaningful and permanent place in the field?
- How can we ensure that all stakeholders have influence over the types of resources available, research, and policies in the field?

Thank you very much, that's all the time we have, and this has been a great discussion. This is the end of our session, and we will be closing the breakout rooms now and you will go back to the main session room. We will stay on in the main session room for 10 minutes in case you have any questions for us, otherwise you are welcome to leave the session.

B. Protocol for Dialogue Days with Leaders of HBCU OER Initiatives

Introduction

Hello, I am _____, of edBridge Partners, and I am joined today by my colleagues _____ of edBridge Partners. edBridge is an education management consultancy, and we work with foundations, institutions, systems, and associations across both higher ed and K-12 on strategic and executive initiatives and projects.

Thank you for joining the conversation today. We are really pleased to be facilitating this session today.

This session is part of a formative evaluation we are conducting for the William and Flora Hewlett Foundation. This evaluation is seeking to understand how and to what extent existing open education networks are serving the needs of the open education field, how the field is evolving as it matures, and how we can continue to ensure that the field is diverse and inclusive.

As networks have evolved and grown in a relatively short period of time and as the field continues to change, now is a good time to take stock of how and to what extent these networks are serving the needs of key stakeholders and decision makers and how the field has evolved.

The objective of our session today is to have a rich dialogue with all participants and to encourage active listening. Each of you brings a unique perspective, experience, and expertise to the discussion about open education efforts to date.

We encourage you to be respectful, inclusive, and accepting of others' opinions and perspectives, approach differences with openness and curiosity, and to try to step back and listen if you find yourself dominating the conversation at any point.

To accurately capture our conversation today, I would like to ask your permission to record. Does anyone object?

Introductions

Individuals in the session introduce themselves, give their title, institution, or organization, and briefly describe their role and responsibilities related to open education.

Share HBCU Survey Results

You and several of your colleagues representing HBCUs participated in our online survey in the fall. We'd like to share some key findings:

Overall, most rated the open education field highly:

- 67% rated the field excellent or good for achieving its goals
- 84% rated the field excellent or good in effectively serving its stakeholders

However, there is still work to be done:

- 50% indicated there were gaps in the types of stakeholders and audiences effectively served by open education; 50% were unsure No one said there were no gaps
- +80% felt there were unmet needs in open education
- +70% indicated there was a need for new networks

Follow Up to Survey Responses

Gaps and Unmet Needs

- What do you need to move the work of your network forward?
- What would be of greatest valuable to your members and stakeholders?
 - » Content? What would new content look like? Who would be developing this content?
 - » Training or professional development? In what areas of open education? For which audiences served by your network?
 - » Other types of resources?
- What would you need to increase awareness of and support for your work among your institution's leadership?

New Networks

Survey response indicated that many feel new open education networks could benefit the field.

What would those networks look like?

- What areas of open education would new networks address?

- Could new networks help advance your open education goals?

Vision and Future Direction

- How can we ensure that all stakeholders are represented in the open education field and have influence over the types of resources, research, and policies that are created?
- What does the open education field need to do to have greatest impact and sustained success in the future?
- What is your future vision for open education (10 years from now)?

C. Protocol for Dialogue Days with Leaders of K-12 State and District OER Initiatives

Introduction

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As networks have evolved and grown in a relatively short period of time and as the field continues to change, now is a good time to take stock of how and to what extent these networks are serving the needs of key stakeholders and decision makers and how the field has evolved.

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To accurately capture our conversation today, I would like to ask your permission to record. Does anyone object?

Introductions

Individuals in the session introduce themselves, give their title, institution, or organization, and briefly describe their role and responsibilities related to open education.

Value Proposition

- When you advocate for open education in your state or district, what benefits are you describing? What problems does open education solve for K-12 educators?
- Who is most influential in the decision to adopt OER in your districts and states? Who else is involved in the decision-making process? (Probe: How do you coordinate with each other?)
- How are you communicating with potential adopters? What types of messages resonate? Probe: with teachers? With school leaders? With state leadership?
- Where and with whom have you been most successful in advocating for open education? What have been some of your challenges?
- Do you currently use any OER in your school or district? If so, where do you go for these resources? Are you purchasing materials from a publisher (like Open Up Resources or Kendall Hunt) or you do host your own portal, or both? Are teachers creating their own resources?
- Are OERs generally being used for whole courses/curriculum, or more supplemental?

Networks

- What do you need to move your work forward?
 - » Probe: professional development, policy, connections, leadership, incentives?
- What types of networks do teachers and school leaders in your community go to for support and professional development generally? Probe: Conferences, local PD, etc.
 - » Is there an opportunity to have a conversation about open education with those network leaders?

Diversity, Equity, and Inclusion

- Is increasing diversity, equity, and inclusion a goal for your state or district? If yes, how have you been working on this? Have your efforts with OER been a part of those discussions? Do you see open education addressing those goals/needs in your states/districts?
- Is there an opportunity for open education to help educators create culturally responsive curriculum? If yes, what you need to move this forward (if needed, examples might be: different/more culturally responsive OER, professional learning for teachers and leaders).

Vision and Future Direction

- What does the open education field need to do to have greatest impact and sustained success in the future for K-12 education?
- What is your future vision for open education (10 years from now)?

APPENDIX C: NETWORK LEADERS DIALOGUE DAYS

DEI Strategic Plan Template

Hewlett Foundation Open Education Leaders Dialogue Day

We ask that you complete this form, or share your network's strategic plan prior to the second Dialogue day (due by March 18th). edBridge will analyze and synthesize this information to inform the discussion at the Dialogue Day session on March 25th. The information you provide will be kept confidential and will only be seen by edBridge Partners and the Hewlett Foundation. Information will be summarized and presented in the aggregate.

Name of Network (if you are leading multiple networks, select one): _____

1a. How do you and your network define the following in your work:

- Diversity?
- Equity?
- Inclusion?

1b. Are there different or additional ways that your network frames its work in this area? For example, around social justice, belonging, etc.?

2. Has your network identified a specific set of goals around diversity, equity, and inclusion? If so, please provide them here.

3. What activities have you organized in the past as a network to advance your work around DEI? In which area have these activities most focused - Diversity, Equity, or Inclusion?

4. What activities do you have planned in the next year or two as a network to advance your work around DEI? In which area are these activities most focused - Diversity, Equity, or Inclusion?



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