HARMONISING RESEARCH BETWEEN SOUTH AND NORTH: RESULTS FROM ROER4D'S QUESTION HARMONISATION EXPERIMENT

Trotter, H.;
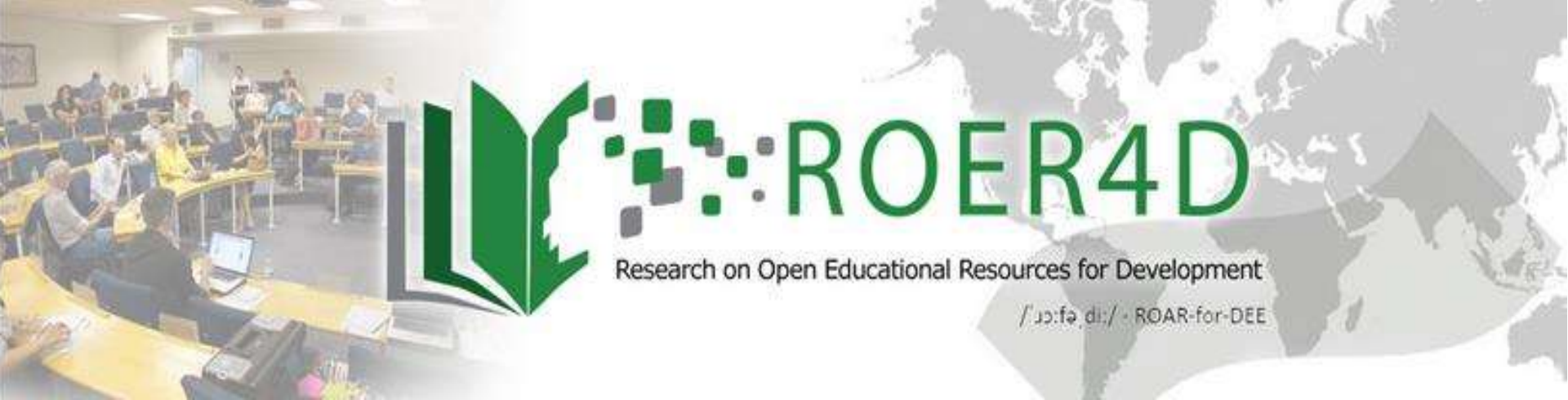
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Harmonising Research between South and North:

Results from ROER4D's Question Harmonisation Experiment

Henry Trotter

Open Education Global Conference 2015 : 22 April 2015

OER Research Hub: OER Projects Map

http://oermap.org/home/1900-2/

OER Research Hub: OER Evidence Map

ROER4D: Comprised of multiple sub-projects in Global South

GENERAL OBJECTIVE:

IMPROVE EDUCATIONAL POLICY, PRACTICE and RESEARCH in developing countries by better understanding the use and impact of OER

August 2013 - February 2017

PROJECT CLUSTERS

- OER Desktop Review
- OER Survey
- Academics' adoption of OER
- Teacher educators' adoption of OER
- OER adoption in one country
- OER impact studies
- Baseline educational expenditure

Mongolia · Afghanistan · Pakistan · Senegal · Ethiopia · India · Colombia · Uganda · Somalia · Sri Lanka · Philippines · Ghana · Rwanda · Kenya · Malaysia · Peru · Tanzania · Indonesia · Brazil · Zambia · Mauritius · Chile · Madagascar · Mozambique · Zimbabwe · South Africa

roer4d.org
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ROER4D
Research on Open Educational Resources for Development
/ˈroːfə diː/ - ROAR-for-DEE

wawasan open UNIVERSITY
the people's university

IDRC · CRDI
International Development Research Centre
Centre de recherches pour le développement international
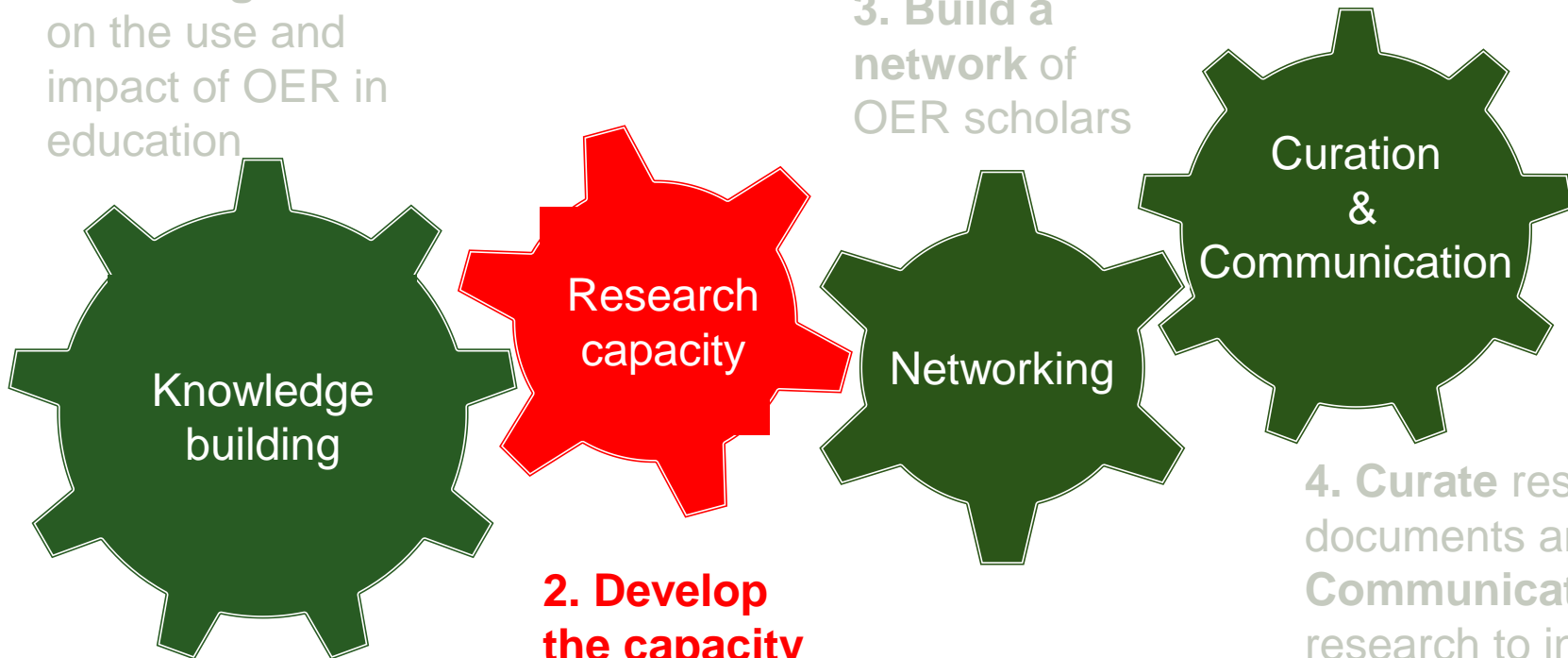
UKaid

created by Rondine Carstens and the ROER4D team

ROER4D Objectives

1. Build an **empirical knowledge base** on the use and impact of OER in education

3. Build a network of OER scholars

Curation & Communication

Research capacity

Networking

Knowledge building

2. Develop the capacity of OER researchers

4. Curate research documents and **Communicate** research to inform education policy and practice

Research capacitation through Question Harmonisation

4 goals:

- Harmonise our research questions, where possible, with that of other OER studies such as OER Research Hub, OER Asia, JISCOER, etc.

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- Harmonise our research questions, where possible, across our 12 projects

- Use this QH process to build the research capacity of our sub-project researchers and research associates

- Provide a model of best practices for other research for development projects concerning QH

1. Consulted 9 major OER surveys to develop a bank of potential questions…

ROER4D

Research on Open Educational Resources for Development

| Role in institution | Is there a relationship between the educators' role(s) within the institution and their adoption of OER? | Educators' role(s) within the institution influence their adoption of OER | Function in (institution) OR What role(s) do you have within the University? (You can tick more than one box if needed.) ##Teaching undergraduate students ##Teaching postgraduate students (Master's, PG Dip, PG Cert but not PGCE) ##Supervising research students (PhD, DPhil) ##Professional development of trainee teachers or early-career lecturers (e.g. PGCE or PG Certificate in HE) ##Professional development of experienced lecturers ##Directing a degree programme or a subdivision of it (e.g. a module) ##Approval and/or quality assurance of programmes or their subdivisions ##Learning technologist: advising staff in the use of IT in their teaching and/or developing e-learning materials ##General administration ##Other (please specify) OR What is your job title? (Please state) OR Please indicate the type of education activity you are involved with. Select any that apply. ##Face to face teaching ##Distance/Online teaching ##Blended (Face to face and Distance/Online) teaching ##Management ##Support ##Other (please specify) | | Study 1 – UNESCO Study 3 - JISCOER - Teaching Staff Study 5 - Rights and rewards Study 7 - Oriole 2013 McKerlich, Ives & McGreal (2013) |

…and multiple OER studies to compare those questions

ROER4D
Research on Open Educational Resources for Development

Role in institution	Is there a relationship between the educators' role(s) within the institution and their adoption of OER?	Educators' role(s) within the institution influence their adoption of OER

ROER4D Question Harmonization Surveys Consulted (Thus Far)

1. UNESCO/COL Survey on Governments' OER Policies – which resulted in this report.
2. CERI/OECD OER Follow-Up Survey – OER use by educators and researchers in tertiary education.
3. JISC OER Impact Study survey –on OER use and sharing by educators (pp 69-79).
4. OPAL survey on the use of OER and OEP in HE and AL Institutions – (pp 171-186).
5. Rights and Rewards Project survey – focused on academics' use of repositories and sharing (pp. 171-180).
6. ORIOLE Survey 2011 – HE professionals' use, reuse and sourcing of learning resources.
7. ORIOLE Survey 2013 – an updated, internationalised version of ORIOLE 2011, also in Spanish.
8. SESAME Project Baseline Tutor Survey – focusing on OER use by tutors in the AL & CE sectors.
9. OER Asia Survey – OER use in Asia.
10. UCT MEd minor dissertation study [available from Cheryl]
11. McKerlich, Ives & McGreal (2013) Measuring Use and Creation of Open Educational Resources in Higher Education
12. OCWC User Feedback Survey
13. Bossu, Brown & Bull (2011) Adoption, use and management of Open Educational Resources to enhance teaching and learning in Australia.
14. Falconer (2012) – OER4Adults Short Poll
15. Gunness, S (2012) – Learner-Centred Education through OER
16. OER Research Hub Survey
17. Rolfe, V (2012) - Open educational resources: staff attitudes and awareness
18. Reed, P (2012) - Awareness, attitudes and participation of teaching staff towards the opencontent movement in one university
19. CERI/OECD Survey – Giving Knowledge for Free: The Emergence of OER (pp.131-138)
20. Murphy, A (2012) Benchmarking OER Use and Assessment in Higher Education

2. Discussed question options, chose the best & recorded rationale for decision

DEMOGRAPHICS

#	Factor / Concept	Research question	ORIGINAL question	UPDATED question	Rationale for change
1	Name of respondent	(For initial identification only – to be anonymised in the questionnaire responses and interview transcripts)	Name of respondent	Name of respondent ## First name ## Surname (if applicable)	Because some people only have one name, we added the words "if applicable" after the surname
2	Gender	Is there a relationship between students and educators' gender and OER adoption?	Please tick: Male Female	Please tick: ## Female ## Male ## Transgender/Other	We added Transgender/Other to the male and female choices so as to cater to any respondents who feel that their gender exists outside the two usual categories.
3	Age	Is there a relationship between students and educators' age and OER adoption?	Please tick age category: <19, 20-29, 30-39, 40-49, 50-59,60-69, >70 In which age category would you fit? What is your age? **24 or under **25 to 34 **35 to 44 **45 to 54 **55 to 64 **65 or over	Please tick age category: ## <20 ## 21-25 ## 26-35 ## 36-45 ## 46-55 ## 56-65 ## 66+	We are still deciding how to phrase this, as 5-year options as listed to the left, or through a drop-down menu with birth years. If we use birth years, then we can code the data ourselves after the fact, free of the artificial 5-year or 10-year categorizations that are common in other studies.
4	Disability	Is there a relationship between disability, and/or disability types, and OER adoption?	[Nothing]	Do you consider yourself to have a disability? ## Yes ## No	After consulting the OER Research Hub Survey, we decided to add this as well. It makes sense that

ROER4D Sample Survey: Demographics Section

5.	In which country do you work?	[choose from drop-down list]
6.	What institution do you work in?	(Write out) _____
7.	In which area do you work?	(Tick one) □ Agriculture and Veterinary □ Business and administration □ Education □ Engineering, Manufacturing and Construction □ Health and Welfare □ Humanities and Arts □ Science, Mathematics and Computing □ Services □ Social Sciences and Law □ Other (please specify)_____
8.	What role(s) do you have within the University?	(Tick all that apply) □ Teaching undergraduate students □ Teaching postgraduate students □ Supervising research students □ Professional development of trainee teachers or early-career lecturers □ Professional development of experienced lecturers □ Other (please specify) _____
9.	Please indicate the type of education activity you are involved with:	(Tick all that apply) □ Face-to-face □ Distance/Online □ Blended/Hybrid (Face-to-face and Distance/Online) □ Work-based training □ Other (please specify) _____

3. Shared Qs with researchers, showing how they would appear in survey form

ROER4D Sample Survey: Demographics Section

5.	In which country do you work?	[choose from drop-down list]
6.	What inst	
7.	In which	
8.	What role University	
9.	Please in activity y	

Q #	ACCESS questions	Answers
1	Do you have access to the Internet?	(Tick one) □ Yes □ No
2	[If YES to q1] Where do you access the Internet?	(Tick all that apply) □ home □ school/university □ public library □ work □ internet cafe (e.g. cyber café/Lan house/internet shop, etc.) □ WiFi hotspot (e.g. café, restaurant, mall, etc.) □ family member's or friend's home □ other: _____
3	[If YES to q1] What devices do you use to access the internet?	(Tick all that apply) □ laptop computer □ desktop computer □ tablet □ mobile phone □ other: _____

4	[If YES to q1] Who owns the technology that you use to access the internet?	(Tick all that apply)	Laptop computer	Desktop computer	Tablet	Mobile phone	Other
		me	□	□	□	□	□
		school/university	□	□	□	□	□
		public library	□	□	□	□	□
		internet cafe	□	□	□	□	□
		WiFi hotspot	□	□	□	□	□
		family member	□	□	□	□	□
		friend	□	□	□	□	□
		other: _____	□	□	□	□	□

Ulises Hernandez...
10:45 AM Apr 5, 2014

This question has to Question 2 and Question 3. Just add a column that says: Do not I connect from this site.

…but to do so, we had to work out everyone's time zones & best meeting time

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Home 🏠
Announcements 📣
Resources 📁
Research Process 📖
Forums 💬
Chat Room 🗨
Wiki ✏
Email Archive ✉
Participants 📇
Search 🔍
Site Setup 🖼
Site Stats 📊
Lectures 📲
Help ❓

🔄 **Research Process > Question Harmonisation**

| Add Text | Add Multimedia | Add Resource | Add Subpage | Add Question | Add Assignment | Add Quiz | More Tools ▾ |

Edit **Question Harmonisation**

This space supports the Question Harmonisation Adobe Connect sessions. You are invited to review and comment on dra
other researchers. You can also listen to a recording of the Adobe Connect session.

The purpose and key activities of the question harmonisation process is designed to:

1) Define the key "concepts" in which we are interested in the ROER4D research studies - there will be some that are sha
2) Surface the the underlying assumptions/hypothesis that these questions suggest to make sure we know WHY we think
3) Optimise opportunities for comparison across the regions, countries, institutions, educators and students - so that we r
4) Reduce the number of questions to make the research data gathering and analysis process manageable
5) Make sure we can all answer our intended research questions!
6) Reduce the effort of the individual researchers.

Edit **Topic 1: Demographic questions**

Edit 🟢 **View DRAFT demographic questions**
Edit 🟢 **Listen to the Adobe Connect session on DRAFT demographic questions**
Edit 💬 **Discuss ROER4D DRAFT demographic questions**

Edit **Topic 2: Access questions**

Edit 🟢 **View DRAFT access questions**
Edit 🟢 **Listen to the Adobe Connect Session on DRAFT Access and Creation questions**
Edit 💬 **Discuss ROER4D DRAFT access questions**

Edit **Topic 3. Creation questions**

Edit 🟢 **View DRAFT creation questions**
Edit 💬 **Discuss ROER4D DRAFT creation questions**
Edit 🟢 **Listen to the Adobe Connect Session on Access and Creation questions (same recording as Topic 2)**

6. Harmonised *concepts* as part of process (via Adobe Connect & Google Docs)

https://docs.google.com/document/d/1Iz1kVC4CYLFJBtZNm2o5ziFJKW96SjtNjhWHfTKKkbI/edit

7. Piloted survey based on harmonised questions with ROER4D members and other OER colleagues (version 1)

30. Which types of resources have you shared, and how frequently? (Tick all that apply)

	Never	Rarely	Sometimes	Often	Always
Textbooks	O	O	O	O	O
Whole courses	O	O	O	O	O
MOOCs	O	O	O	O	O
Elements of a course (e.g. a module/unit)	O	O	O	O	O
Videos	O	O	O	O	O
Audio podcasts	O	O	O	O	O
Images	O	O	O	O	O
Infographics	O	O	O	O	O
Interactive games	O	O	O	O	O
Lecture notes	O	O	O	O	O
Lesson plans	O	O	O	O	O
Tutorials	O	O	O	O	O
Quizzes	O	O	O	O	O
e-Books	O	O	O	O	O
Data sets	O	O	O	O	O
Learning tools, instruments & plugins	O	O	O	O	O

Other (please specify)

31. How do you share the OER you have created? (Tick all that apply)

☐ Personal website or blog

☐ Departmental website

☐ Institutional learning management system

☐ Institutional repository

☐ Regional repository (e.g. OER Africa)

☐ International repository (e.g. MERLOT)

☐ Image/video-based services (e.g. Flickr, SlideShare, YouTube)

☐ Cloud-based storage (e.g. Google Drive)

Other (please specify)

8. Assessed results and gave feedback to researchers on pilot survey

9. Revised the questions and shared them with network (version 2) …

Q#	USE (of OER)	Answers
45.	Do you ever use Open Educational Resources (OER) in your teaching? (i.e. materials that are free, openly licensed and allow for reuse)	□ Never □ Rarely (less than 5%) □ Sometimes (5%–20%) □ Often (20%–50%) □ Frequently (more than 50%)
46.	[if NEVER to q45] Why have you never used OER in your teaching?	(Tick all that apply) □ I am not aware of OER □ I do not have access to OER □ I do not know where to find OER □ I prefer to use my own materials □ It has never occurred to me to use it in my teaching □ It is not common practice in my disciplines / institution / etc. □ It worry about the quality of OER □ I have not yet found any OER that is relevant for my teaching □ Incorporating OER would be too time-consuming □ I do not teach Other (please specify) _____
47.	[if POSITIVE to q45] Where do you download the OER that you use?	(Tick all that apply) □ Personal websites or blogs □ Departmental websites □ Institutional learning management systems □ Institutional repositories □ Regional repositories (e.g. OER Africa) □ Image/video-based services (e.g. Flickr, SlideShare, YouTube) □ Cloud-based storages (e.g. Google Drive, Dropbox) □ Google Scholar Other (please specify) _____

…providing access to all QH session videos & docs that went into the process

Table 1: Overview of ROER4D Question Harmonisation Processes and Products

10. Enjoined researchers to share their adaptations of the harmonised survey for their own sub-projects via webinar sessions…

…and recruited some of them to share their research knowledge experience with us next year during the bi-weekly Adobe Connect sessions

Evaluation Question:
What research skills could YOU contribute to the research capacity building?

Formulating research instrument questions (5)
- PI (research questionnaire development)
- Research Assistant (developing research instruments)
- Researcher (Scale development)
- Researcher (development of research tools)
- Researcher (instrument development)

Analysing qualitative data (2)
- PI
- Hub team (using NVivo)

Developing a conceptual framework (2)
- PI
- Research Assistant

Report writing (2)
- Hub team
- Research assistant

Writing a research question (1)
- PI

Presenting research work (1)
- Hub team

Analysing quantitative data (1)
- Mentor

Outcomes (positive)

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1. Through extensive collaboration, deliberation and testing, we developed a set of questions that were:
* well-**harmonised** with other large OER surveys
* sensitive to and **adapted** for the Southern context
* successful at **obtaining useful data** on academics' creation and use of OER

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5. **Some researchers incorporated the questions** into their surveys or interviews.

Outcomes (negative)

1. Research capacitation was uneven

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2. Technology problems

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2. Technology problems
3. Too long

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2. Technology problems
3. Too long
4. Harmonisation buy-in incomplete

What worked?

What didn't work?

What worked?

1. Having regular sessions

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What didn't work?

1. The "voluntary" model

What worked?

1. Having regular sessions
2. Inviting researchers to share their own work
3. Working collaboratively and "openly" (within the project)

What didn't work?

1. The "voluntary" model
2. Initiating the process after other key issues had already been decided

Going Forward: Capacity Development beyond Question Harmonisation

From CD1 to CD2

ITAD (Information Training and Agricultural Development)
Learning Network on Capacity Development (LenCD)

From CD1 to CD2

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CD1
"A CD1 approach typically focuses on building the skills needed to produce an output that meets today's requirements."

From CD1 to CD2

ITAD (Information Training and Agricultural Development)
Learning Network on Capacity Development (LenCD)

CD1
"A CD1 approach typically focuses on building the skills needed to produce an output that meets today's requirements."

CD2
"A CD2 approach aims to build skills but also support new attitudes and behaviours, shift institutional relationships to sustain compliance, and support new, locally-driven policies and practices around the issues into the future."

See: http://itad.com/capacity-development-how-should-we-reframe-it-for-the-digital-age/

Capacity Development 2.0 (according to ITAD)

1. Systems perspectives – see CD through lens of systems & complexity concepts.

2. Four dimensions of change – *personal*; *relationships*; *collective patterns of thinking and action*; and, *systems and structures*.

3. Behavioural competencies – skills training can be seen as a typical activity of a CD1 approach, but it becomes a CD2 activity when it responds to the behaviours needed to connect individual, organisational and network levels of capacity development. For example, how to collaborate within and between teams and organisational boundaries.

4. Elements of an enabling environment – *legitimacy* (acquired or located in a position or structure); *space* to operate, interact, collaborate etc.; *boundary spanners* and brokers; *skills* to carry out technical delivery and mandated tasks effectively.

5. Digital competencies – being able to navigate through the range of tools and activities which could be linked to a CD2 framework.

See: http://itad.com/capacity-development-how-should-we-reframe-it-for-the-digital-age/

CD2 – Are we there yet?

Thank you

Creator: Henry Trotter – henry.trotter@uct.ac.za