Open Educational Practices in Scotland: A Project Evaluation

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Summary

The Open Educational Practices in Scotland project took place between May 2014 and July 2017. It involved five universities in leading a project based in the Open University in Scotland. Its aims were to facilitate best practice in open education in Scotland, and to enhance capacity for developing publicly available online materials across the tertiary education sector in Scotland. The project particularly focused on fostering the use of open educational practices to build capacity and promote widening participation.

The evaluation found that the eight specific project objectives were largely met within the planned timetable. It found examples of excellent practice in some areas, particularly in the development of partnerships with non-education providers in the third sector as a means of extending the reach and effectiveness of open education. The evaluation also found that while the individual objectives had largely been met, and there was clear evidence of a contribution to facilitating best practice, the wider impact on the capacity of the tertiary education sector was limited.

INTRODUCTION

The Scottish Funding Council wrote in February 2014 to confirm its offer of funding to the Open University for a project to develop open educational resources. Formally, the funding formed part of the OU block grant for the period 2013-17, and was treated as Strategic Development Funding. The offer of contract specified that the grant was intended 'to support you and your partners' proposal to develop a web portal, peer support network and awareness raising activities to facilitate best practice in open educational resource'. SFC's contract offered the OU a grant of £1,276,147 over the period of 29 months between March 2014 and December 2016.

The SFC letter reflected discussions in Scotland over the emergence of open online higher education. The Cabinet Secretary for Education and Lifelong Learning wrote in his letter of guidance for 2014-15 that: *I would ask the SFC to take forward a short-term project to further develop and enhance the sector's capacity in online pedagogy and learning technology.* SFC's existing outcome agreement with the OU in Scotland at that time contained specific plans to support the transition from informal to formal learning through the use of open educational resources; the subsequent outcome agreement incorporated the agreement to carry out the OEPS project.

The proposal specified the project's overarching aims as being:

- To facilitate best practice in open education in Scotland through the development of a peer support network, an online hub and awareness raising activities.
- To enhance the Scottish tertiary education sector's capacity and reputation in developing publicly available online materials supported by high quality pedagogy and learning technology.
- It defined open educational practices (OEP) as *the practices around the use and development of a range of online materials from the openly licensed to the freely available.*

The proposal set out eight specific objectives for the project to undertake a number of activities over the three year period between 2014 and 2017, which I have summarised as follows:

a) An analysis of current open educational practices
b) Events programme across Scotland to raise awareness of OEP, share current best practice and build a support network of stakeholders and partners
c) Development of an online hub to encourage and share best practice in open education
d) Development of 'a small number of new and/or reworked high quality OERs which are of particular benefit to Scotland'

e) Work in partnership with bodies such as SQA to provide badging of informal learning
f) Focus on approaches to learning design that 'promote digital inclusion and engage new learners who would not otherwise participate in tertiary education'
g) Build on existing research evidence to help improve the evidence base
h) Evaluate various economic models of openness

The proposal added that over time, the intention was to

- benefit the whole of the higher education sector in Scotland; and
- provide an opportunity for Scotland to enhance its reputation in its approach to open educational practices
- work towards 'sustainability of the project beyond the current period of funding'.

The SFC's letter offering a contract to the Open University did not materially alter the nature of the original proposal. Although the SFC letter did not specify the partners, I was told that in prior discussion it had identified three partner HEIs with experience in open online education (Strathclyde, Glasgow and Edinburgh); the University of the Highlands and Islands joined the partnership later.

THE APPROACH TO EVALUATION

I was originally invited to undertake a 'holistic evaluation' of the OEPS project in January 2017, and the OU issued the contract in March. I have understood the term 'holistic evaluation' as referring to an evaluation of the Project as a whole, which will complement the separate evaluations of different activities undertaken periodically by the Project team.

In undertaking the evaluation, I have drawn on a number of sources. The most important are (a) the materials published by the project, including the website and academic publications; (b) internal documents relating to the project, the vast majority of which were made available rapidly and efficiently by Pete Cannell; (c) social media associated with the project (I have been a follower of the OEPS Twitter feed and blog for some time, and not simply from the start of the evaluation); and (d) interviews with selected members of the Steering Group, the OEPS core team, people working in partner HEIs, and representatives of partner third sector groups. I did not undertake interviews with learners, mainly for practical reasons.

The structure of my report reflects the aims and objectives outlined in the proposal. First, I briefly outline some of the contextual issues that I see as particularly relevant to the immediate environment within which the OEPS project developed. Second, I go through each of the eight objectives listed within the proposal, and examine the extent to which they have been achieved within the lifetime of the project. Third, the report considers the two overarching aims that the project was intended to achieve, and offers comment on issues of organisation and leadership. It then concludes with an overall judgement and a brief set of recommendations.

THE CONTEXT

Expertise and interest in open education has accelerated rapidly in the last five or six years. Several networks and agencies in Scotland have brought together professionals and scholars interested in the area, with the Scottish Open Education Declaration of 2014 marking the culmination of this wider national debate among advocates of open education.

Nevertheless, the adoption of open education has been uneven. The University of Edinburgh and Glasgow Caledonian University appear to be the only Scottish HEIs to have developed explicit policies for open educational resources. Some other Scottish universities have participated in some of the best known MOOC consortia, including Coursera and FutureLearn. The Open University, which manages the latter, describes itself as a 'world leader in the development of open educational resources'. The College Development Network has launched a group of professional development programmes branded as CDN online. Elsewhere in Scottish tertiary education, open education is not widely understood, and terms such as open licences or open resources are still unfamiliar to many education professionals. And in my experience, open education is least familiar to those working with non-traditional learners, whose professional experience and formation tends to focus on the inter-personal and the face-to-face.

Yet digital exclusion and educational exclusion are closely intertwined. While gaps in internet access and use remain, the vast majority of Scots are now able to use the internet in their everyday lives, with 80% of Scottish households reporting in 2015 that they have internet access at home, up from 42% in 2003 and 69% in 2010. Moreover, a growing proportion are using mobile devices to access the internet at home, with laptops and desktops being in decline (Scottish Government 2016). Yet access is far from ubiquitous. In 2015, 36% of Scots in households with a total net income of £10,001-15,000 said they did not have internet access; 26% of those living in the most deprived 20% of neighbourhoods and 32% of those living in socially rented accommodation said the same (Scottish Government 2016), and there are also wide disparities by age.

These figures suggest firstly that OEPS' focus on widening participation was and is highly appropriate, and is consistent with Scottish Government policies for 'closing the digital divide' as well as the SFC aim of improving access to higher education for people from the widest range of backgrounds. At the same time, they confirm that focussing on educational inclusion for groups who might be unfamiliar with even the basics of internet usage would clearly present challenges to the project.

At national level, it is difficult to discern a distinct policy steer on open education. Both the Scottish Government and the Scottish Funding Council have indicated broad support for open access publishing of publicly funded research, and the SFC has signed up to UK-wide policies for open access relating to research quality assessment processes, but neither body has yet taken a policy position on open education. The Scottish Government has published its policy for digital government and digital inclusion which refers to the existence and potential of open education but does not go into detail (Scottish Government 2017); the phrase 'open education' is absent from the current SFC strategic plan. In a guide to open badging issued in 2014 SQA and Education Scotland urged providers to 'Look out for further support from the Scottish Qualifications Authority, Scottish Government and Education Scotland, who are taking an active interest' (SQA 2014). However, there seem to have been no clear consequences of this 'active interest'.

In 2016, Lorna Campbell (leader at the time of the Open Scotland initiative) concluded that 'At best, open education is seen as being somewhat peripheral to Scottish Government priorities, primarily due to the perceived lack of a statistical evidence base supporting the impact of open education on learners' (Campbell 2016). Those to whom I spoke to in the course of the evaluation believed that the Scottish Government has taken the view that open educational practices are best left to the institutions, and my impression is that this is also the de facto position of SFC.

A final point to consider in evaluating the OEPS project is the extent to which the immediate environment changed over the period 2014-2017. This is most marked within the college sector, which has seen a large scale programme of merger and reorganisation, governance reform, reductions in public funding, and policy guidance requiring the sector to focus its attention upon full time programmes for young people that are of vocational relevance. This in turn has impacted upon the sector bodies, Colleges Scotland and the College Development Network. While changes have been less dramatic in higher education institutions, the number of mature undergraduates and of part-time degree students has fallen steadily over the period. There has also been a national decline in community adult learning, along with the demise of some smaller voluntary sector providers.

ACHIEVING THE PROJECT OBJECTIVES

OEPS began its work formally in May 2014, after delays in issuing the contract. Inevitably, this meant that the project would not end in December 2016, as envisaged in the SFC offer letter, but in July 2017. The OU drafted a detailed project plan, which was submitted to the first meeting of the Steering Group; this was subsequently complemented by a set of key performance indicators which the SG approved in September 2015. The KPIs were organised around the eight objectives identified in the project proposal, and I will take them in turn.

Objective 1: Analysis of open educational practices in Scotland

In my judgement, this objective has been substantially met. As well as gathering information and identifying expertise through the Forums and other activities, the project team planned two large scale surveys of teaching staff in colleges and universities. Originally the surveys were planned (according to the second yearly report) to report in late 2015. In the event the survey was delayed until early 2016.

The college survey took place between February 1st 2016 and March 20th 2016. The questionnaire was distributed in 24 Colleges, using the project's existing institutional contacts, and responses were obtained from 16 of them. However, over 75% of the 236 respondents came from 5 institutions, and the project team were understandably reluctant to place too much weight on the findings.

The HEI survey took place between 19th October and 23rd November 2015. The questionnaire was distributed in 19 HEIs, using the project's existing institutional contacts, and responses were obtained from 15 of them. However, almost 78% of the 235 respondents came from 4 institutions, and the project team were again reluctant to place too much weight on the findings.

Summary findings from the surveys were posted on the OEPS blog in October 2016, with a link to the full survey reports. Despite their cautious approach to the findings, the project team emphasised in their reports and in interviews that the survey results were consistent both with other studies and with their own more impressionistic evidence based on experience and on interaction with those who attended the forums.

Both surveys showed relatively low awareness of open education resources in both colleges and HEIs; among both college and HEI staff the most common barriers to adopting OERs were reported as lack of awareness of OER and lack of knowledge in how to use them. In interview, the course team also reported that they had interpreted the low response rate to the survey as likely to reflect relatively low awareness of and confidence in ability to use OERs. Overall, the team reported to the steering group,

outside the educational technology community there is relatively little recognition of these acronyms or of the discourse associated with them.

It is difficult to estimate the wider impact of the surveys, partly because the delays meant that there has been relatively limited time for them to achieve impact. The response rates, while lower than hoped, were higher than those in the project KPIs (which anticipated a minimum of 200 responses in each sector). Summary findings from the surveys were posted on the OEPS blog in October 2016, with a link to the full survey reports.

The project had planned an additional survey with organisations working in the digital participation sector. Given the size of the sector, a survey was probably not a realistic way of investigating links between the sector and OER/OEP, and it was not conducted, with the project team opting in its place to engage with the sector through the SCVO, which has taken a prominent role in delivering the national strategy for digital inclusion. This seems to me an entirely reasonable way to proceed.

The project also published a series of case studies of open education. At 29 June, 21 case studies were available on the OEPS website. The overwhelming majority of case studies cover open education in Scotland, with some describing OEPS activities. The external interviewees were aware of the case studies, and most had used them.

Objective 2: Events programme

The events were intended to raise awareness of OEP, share current best practice and build a support network of stakeholders and partners across Scotland. The project conducted a large and varied programme of events and in my judgement, this objective has been substantially met.

First, the project organised four Forums in 2015 and 2016. These were intended to provide 'an opportunity for practitioners to discuss open educational practices in a face-to-face environment' (OEPS website). They were held in a central Scotland venue (two in Stirling, one each in Glasgow and Edinburgh).

The forums were widely publicised and generally well attended. The first was smallest, with 25 attendees from 22 organisations, and the Steering Group (SG) was asked to comment on how to improve attendance. The next attracted 67 attendees, with 88 attending the third and 49 the fourth forum. The typical programme was a one-day event with a keynote speaker followed by parallel workshops and a closing plenary.

A further potential target was the business sector. The original proposal referred to supporting workplace learning, and the first SG meeting noted that new OERs should aim at 'meeting the skills needs of key economic sectors in Scotland'. Employers per se were not identified as a focus for the project, which sought to approach workplace learning through trade unions. Three of the 137 non-team participants in the Forums came from business backgrounds.

Participants were asked to evaluate their experience of the day. Participant feedback was overwhelmingly positive. Interviewees who had participated in the forums also spoke very highly of them. Indeed, they were even more positive than the team's own post-event evaluation summaries. Interviewees praised the content of the forums, said that they had made them more interested in open education and more confident in their own ability to develop it, and gave examples of things they had taken forward as a result.

In addition, the project organised workshops across Scotland. The website made clear that any organisation interested in openness could ask to host a workshop, with the result that these were hosted by a wide variety of different organisations. Each workshop set out to tackle a particular aspect of openness, including some workshops on open research.

The most significant outcome of the workshops in terms of course development came from the Royal Highland and Agricultural Society of Scotland (Royal Highland Education Trust). Following participation in one of the OEPS forums, the Trust went on to set up its own course for teachers called 'Grow Your Own loaf'.

By September 2016, the project team reported that they had delivered 55 workshops, with the co-hosts roughly balanced between education institutions (27) and non-formal education providers (28). Currently, 79 workshops have been offered, with a broadly similar balance between education institutions and non-formal providers.

The workshops lasted between half a day and a full day, and were held in venues across Scotland. While many workshops were held by hosts in the central belt, others included the Scottish Association for Marine Science in Oban, Glasgow University's Crichton Campus in Dumfries, the Scottish Prison Service at Cornton Vale, the University of Abertay in Dundee, UHI in Inverness, and Ardnamurchan High School. It is not clear how many people attended, but it clearly varied; one

interviewee told me that the workshop she had helped co-host at her university had been attended by half a dozen people, another academic at another Scottish HEI said that both workshops she took part in were well attended.

Interviewees who had been involved in workshops spoke highly of the experience. Two officials from Scottish Union Learning who had helped organise workshops in venues across Scotland for union members said that the workshops had stimulated demand for open online courses among their members and additionally that they had been approached by a number of union branches asking for follow up events. They also pointed out that the exemplar course on supporting collective learning in the workplace had arisen from Unite members having participated in a workshop.

Another interviewee, a lecturer from an HEI, said that after attending a workshop at her university she had decided to draft a proposal for a funded PhD studentship on collaborative online learning; while that proposal had failed she was now a partner in a European Erasmus project on OERs, and was also developing OERs within a modular Master's degree.

Additionally, the project team undertook to offer presentations on open education. Some of these were conventional conference presentations, with audiences who ranged from participants in Scottish Union Learning's annual event through the Association for Learning Technology's OER conference to the annual conference of the Universities Association for Lifelong Learning and a meeting of Universities Scotland's Learning and Teaching Committee.

From the list kept in the project records it appears as though all the project presentations in the first two years were delivered by the two OUiS project workers, with a small number of others becoming involved in the last year and a half; however, I was assured that other members of the team contributed from the outset. Some were a one-off contribution to a particular event, such as the University of Abertay's annual conference on learning and teaching; others formed part of a continuing partnership, as with Scottish Union Learning; and others were an attempt to engage with a strategic audience, as with the Universities Association for Lifelong Learning.

Finally, the project organised a joint event with UHI. Organised as a two-day symposium entitled The Porous University, and taking place in Inverness in May 2017, the event attracted international attention and was followed up by blog posts of key presentations.

The overall scale of the events programme is impressive. However, the impact of these activities is difficult to measure, particularly given that the events were offered over such a wide range of venues and partners. One interviewee, whose involvement was through an HEI, compared the workshops with a helicopter: people came in and spoke, then left, with little engagement with the

institution. Nevertheless, the evidence overall suggests that the events were popular, and that they appear to have raised awareness in Scotland of the potential for open education, and improved understanding of what open educational practices can contribute. In some cases the events had more concrete outcomes, helping strengthen existing developments and to a lesser extent spark some new developments in the adoption of educational practices.

Objective 3: The Hub

The original proposal placed considerable emphasis on the project developing 'an online hub to encourage and share best practice in open education'. This was expanded slightly in the March 2015 report, which described the Hub's aim as 'to provide a focus for the development of open educational practices in Scotland', under the sub-heading 'Developing a Scottish Hub for Open Educational Practice'. The Scottish gloss is important in so far as it indicates a distinctive national dimension of some kind, though this was always likely to involve a degree of balance given the inherently cross-border nature of open education and the UK-wide infrastructure and administration of the OU.

The Steering Group discussed the Hub on a regular basis. At its second meeting, in July 2014, the SG asked for 'more clarity' about what the Hub would provide; at this stage it was still very much seen as a long term resource. Subsequent meetings received regular updates, and frequently discussed sustainability. Project updates for February 2016 flagged the Hub as 'green'.

Through the Forum and Workshop meetings, as well as in individual discussions, the project team sought feedback from partners and potential stakeholders on whether they saw such a hub as desirable and if so what resources they wished to see it deliver. By spring 2015, the project had not only clarified expectations from its audience, but had also embarked on the process of building the Hub, which was to be launched (one month later than envisaged) in the autumn, and would include 'a small number of online communities of practice' which would be interactive, functioning through OER search, blog and forum facilities; it would also highlight the possibilities of the OU's OpenLearn Works platform for creating and hosting OERs and modelling OEP (second yearly report, September 2015).

Five online communities were established on the Hub. These included Scottish Union Learning, Parkinson's UK and a community for OEPS itself, as well as a community for the Open Learning Champions network. It is not clear how actively the communities engaged their members. It also provided a gateway to further resources, about open educational practices and open education resources, as well as links to the Twitter feed and blog, and access to the OEPS case studies.

The OEPS legacy plan, presented to the seventh Steering Group meeting, proposed closing the Hub and moving the resources to a legacy site. The rationale for closure and moving the content

to OpenLearn, in the words of the legacy plan presented to the March 2017 Steering Group, was that:

> *For mainly technical reasons the Hub has not been as successful as envisaged. To continue to use the hub would incur considerable maintenance costs and would also require staff time.*

It is arguable that this conclusion possibly understates the non-technical reasons for the Hub's lack of success, and had the signs of this lack of success been identified and discussed rather earlier than they were then less time and energy would have been devoted to keeping it going. Nevertheless, the rationale for the decision made in spring 2017 seems to me to have been well-founded. The SG discussed options, and accepted the argument for closure and transfer to OpenLearn Create.

The rationale for the decision was challenged by none of my interviewees. Some interviewees were concerned that the new site would be seen as representing a transfer of ownership to the OU, and that the collection of resources would not be recognised as distinctively Scottish. But the decision to close it and transfer the resources was viewed as a necessary step if access to the resources was to be maintained, and the OpenLearn Create platform was accepted as an accessible, cost-free and sustainable solution.

Objective 4: Development of a small number of new and/or reworked high quality OERs

Allowing for a degree of uncertainty over the term 'a small number', my judgement is that this objective has been substantially met. At 29 June 2017 the project had supported the development of six new courses, three more had been completed and scheduled for launch in July 2017, and six others were in production with launch dates - which generally had to be agreed with partners - scheduled between 4 September 2017 and 'early 2018'. Completion rates are comparatively high and the evidence tends to suggest that they are of high quality.

A marked feature of the new OEPS courses is that they have been developed in conjunction with partners, the majority of whom are outside the formal education sector. Dyslexia Scotland and Parkinson's UK have both developed suites of courses with the project's support; Supporting Collective Learning was produced by the OEPs team in collaboration with informal education providers such as trade unions. Two of the new courses were developed with the project's support by universities other than the OU: Global Trends in Death and Dying was developed in partnership with the University of Glasgow, and My Seaweed Looks Weird with UHI.

The first new OER in development was negotiated with the End of Life research team at the University of Glasgow's Crichton Campus. The Glasgow team was involved in an international

comparative analysis of end-of-life interventions funded by the Wellcome Trust, and was keen to identify new ways of engaging a wider public in this work. Despite the early start, and the fact that the resulting course had been completed by the time of the evaluation, it was still not launched at the end of June, reportedly due to other staff commitments at Glasgow. The course went live on OpenLearn Create in July 2017 under the title 'Global Trends in Death and Dying'. Given the investment in developing this course, it is not clear why its launch was not pursued rather more vigorously. Nor was it the only course to be delayed; two courses involving the OU Science Lab[1] have been reportedly 'in revision' for some time.

Recruitment for the partnership-produced OERs has largely been impressive, and completion rates even more so. By 17 June, the first UK Parkinson's course, Understanding Parkinson's, had attracted 869 registered users, of whom 244 had completed the course; the Introduction to Dyslexia course had recruited 555 registered users, of whom 78 had completed. No comparable up-to-date figures for MOOCs are available, but it is commonly reported that completion rates of under 10% - and often well under - are the norm (Hone and Said 2016). By contrast, the completion rates for the new OEPS OERs were 14% for the Dyslexia course and 28% for the Parkinson's course.

One course has not recruited well. My Seaweed Looks Weird was produced by the Scottish Association for Marine Science (SAMS), a specialist research institute which is associated with the University of the Highlands and Islands. The course had 20 registered users at 29 June 2017, of whom five had completed. This was originally agreed to be part of a suite of courses delivered by SAMS, but the partnership did not produce further resources. This could be viewed as a minor irritation but for the fact that the other OER produced with an HEI faced repeated delays in going live.

There is some evidence that the new OERs have also attracted significant numbers of 'informal' users. Becoming an Open Educator and Introduction to Dyslexia have similarly high numbers of page hits (slightly over 9,000 each), though the latter course has awarded 6 times as many badges. My Seaweed Looks Weird has a smaller but still significant number of page hits (over 1,700), despite reaching only 5 badges. Project staff believe that this pattern is consistent with their impression from personal contacts that wider groups of people are using the OERs to pursue a particular topic or for reference rather than as a course in itself.

The project has been less successful in developing new OERs with the college sector. The College Development Network (CDN) had participated in workshops and had held discussions with project

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[1] 'The analysing pesticides experiment' course is available at http://www.open.edu/openlearncreate/enrol/index.php?id=1923 and the 'Genetic variations experiment' course is at http://www.open.edu/openlearncreate/enrol/index.php?id=1924

staff before joining the SG during the project's third year; while this did not produce any new OERs with the college sector, CDN agreed to host [Becoming an Open Educator](#) on its Learn Online platform, thus promoting it to college staff. The Steering Group heard in February 2015 of plans to contribute to teacher education in the sector through a 20 credit module on Open Education as part of the Teaching Qualification in Further Education at the University of Stirling. This fell through, partly because it was not easy to find space within the TQFE programme for an area that employers in the sector did not see as a priority; currently pre-service students in the programme spend one day researching digital education, and are encouraged to look particularly at the OEPS course in Becoming an Open Educator.

The original proposal specified that the new OERs should be 'of particular benefit to Scotland'. There is evidence to support the claim that the new OERs are intended to have national benefits. The clearest example is the dyslexia courses. Dyslexia Scotland makes it clear on its website that its own courses were developed partly in response to Education Scotland's national review of education and support for young people with dyslexia, published in 2014. In the review, ES recommended that teachers, support staff, learners and parents should have access to up-to-date practical advice and guidance on dyslexia; and that teachers, support staff and local authority staff should have access to a wide range of high quality career-long professional learning opportunities related to meeting the needs of children and young people with dyslexia (Education Scotland 2014, 46). The Dyslexia OERs are intended to fill these gaps, while being fully open to other learners. Similarly, the Parkinson's and Global Trends in Death and Dying courses both match current Scottish Government priorities in care of the elderly, as well as corresponding to Scotland's well known social challenge of demographic change.

The quality of the new OERs, as well as their contribution to digital inclusion, was recognised by the interviewees. It is important in this respect to note that the UK Parkinson's course was shortlisted in the 2017 Scottish Charity Awards for both the Demonstrating Digital and People's Choice categories. Given its location within the OUiS, it would be surprising if an OEPS product failed to meet a reasonable quality threshold; and the evaluation has not uncovered grounds for concern on this score.

From the perspective of the project, the intention behind this objective was to produce exemplar OERs which demonstrated what could be achieved. In developing courses with non-academic partners this goal has been fully met; it has been less successful in working with Scottish HEIs, and it is not clear whether this can be altered by the end of July. However, it is in the nature of fixed term projects that choices are inevitable if priority targets are to be met, and in this case the priority was to produce exemplar OERs.

Objective 5: Work with bodies such as SQA to provide badging of informal learning

The evaluation identified a number of ways in which the project has worked to provide badging of informal learning. The planned engagement with SQA was much more limited than anticipated; while SQA had issued guidance in 2013 encouraging colleges, community and work-based learning providers to consider badges, their main engagement was through the JISC-supported Open Badges in Scottish Education Group (OBSEG).

It is clear that discussions were held with SQA. The SG update in February 2016 noted that discussions were under way, and flagged this issue as 'green'. However, it seems that SQA's interest wavered when it lost a key member of staff who was not replaced, and SQA ceased to maintain its involvement in OBSEG. The project has instead worked with other organisations such as the Scottish Social Services Council, as well as with OpenLearn Create to promote badging of informal learning.

First, the project has helped raise awareness of badging to evidence learning. For example, sessions on badging were held during the first project advisory forum; those involved in delivering these sessions included staff from other bodies such as JISC and City of Glasgow College. The project blog hosted five posts about badging. The project team published an OEPS Briefing explaining what badges are, how they work, and how they relate to national credit frameworks.

Second, the project has adopted badging for its own OERs. As of 21 June 2017, the project had issued 351 badges for six courses; the vast majority of these were for the first Parkinson's course (244) and the Introduction to Dyslexia course (78). The second yearly project report noted that discussions were under way with SQA 'about the option of the course being recognised for credit'. In addition, the project encouraged the badging of other OERs such as the OU in Scotland's *Caring Counts* course for carers.

Some interviewees expressed regret that the project had not led to a closer alignment between open badging and the Scottish Credit and Qualifications Framework. While I can understand this concern, it seems to me unrealistic for OEPS to have brought an international approach to badging in line with a national credit framework, or to have resolved the problems of coherence associated with very small elements of credit. The relevant OEPS briefing provides a constructive discussion of the issues.

The project worked with others such as the Scottish Social Services Council and other partners to develop badging as a form of recognition. However, it is difficult to find evidence of national strategic impact. The expected partnership with SQA did not happen, and no other partner was found who could take forward effectively the debate at national level. To this extent it is therefore

not possible at this stage to judge definitely the extent to which the project has contributed to progression from informal to formal learning.

Objective 6: Focus on approaches to learning design that 'promote digital inclusion and engage new learners who would not otherwise participate in tertiary education'

There is clear evidence that OEPS did indeed contribute to developing approaches to learning design that widen participation to tertiary education and promote digital inclusion. In particular, there was general agreement among interviewees that OEPS' work with third sector organisations had been exemplary and even path-breaking. It is less clear that the focus of the work has led to changes in the tertiary education sector.

The project Steering Group and the project team both expressed support for a focus on widening participation. The first Steering Group meeting determined that the project's new OERs would be in the areas of 'widening participation, meeting the skills needs of key economic sectors in Scotland, transitions, schools and rural sustainability' (SG 2 May 2014). By the time of the OEPS annual report in March 2015, the project team described their overall aim in general terms as 'to develop the practices associated with OER that can be used to support widening participation and transitions between sectors and between informal and formal learning'. By the time of the second yearly report, the project was described as 'tasked to have a focus on the use of OER and the development of OEP in the context of transitions from informal to formal education and between educational stages and into employment'.

The most obvious ways in which the project has extended digital inclusion and engaged new learners have been through the selection of partners; the exemplar OERs described above; the workshops described above; and through the network of Digital Learning Champions.

OEPS has identified and worked with a wide range of partners, partly drawing on existing connections and partly by solid old-fashioned outreach work. Through Dyslexia Scotland, OEPs developed exemplar OERs that reached out to parents and the wider community of people with dyslexia, as well as teachers and support staff. OEPS also worked with trade unions representing prison officers, job centre staff and others who could be defined as 'non-traditional learners'. Similar partners were sought in some of Scotland's more remote and rural communities.

A further mechanism that the project adopted to promote inclusion was the existing network of Digital Learning Champions. The project team described the Open Learning Champion as 'someone in a workplace or a community setting who is enthusiastic about opening up learning opportunities, whom their colleagues trust, and who can help them on the first steps of a learning

journey'. According to the OEPS website, 120 such Champions exist across Scotland, encouraging and supporting others to undertake learning through OERs.

The project has supported Champions through the workshops, a briefing, and a community and blog on the Hub. The Scottish Union Learning interviewees described the OEPS briefing on Open Learning Champions as having been particularly helpful in shaping their thinking and approach. It seems from the interviews that the project has helped Champions further develop their awareness and understanding of open education and its potential contribution, and raised public awareness of the Champions.

In part, the decision to work so closely with third sector organisations seems to have been a response to experience. Very early on, the project team reported that they found 'a lively interest in the potential of open education and an enthusiasm for developing practice' combined with low confidence, low capacity and little experience (OEPS annual report, March 2015). Equally, on a number of occasions the SG discussed the difficulties of engaging effectively with colleges and HEIs over the use of OEPs/OERs. However, the relative lack of engagement with the formal education sector had costs, and attracted criticism from some external interviewees.

It is too early to say with confidence whether the involvement in OERs will promote transitions into other forms of education and training. Interviews with third sector partners produced some positive evidence. Work is already underway to submit the new dyslexia courses to the General Teaching Council for Scotland for recognition as continuing professional development; and the Union Learning interviewees mentioned that some of their learners were now tackling MOOCs from FutureLearn. These are early indications for a process that will largely take place beyond the life of the project.

Objective 7: Build on existing research evidence to help improve the evidence base

The evaluation unearthed evidence of an OEPS contribution to the evidence base, but it is unclear how far that contribution challenges rather than confirms what was understood already. While open educational practices have been widely researched in recent years, this literature is still relatively new, and an agreed 'common wisdom' has yet to emerge. Moreover, it is characterised by a tendency to focus on action research, and is often divided between studies with a primarily technological focus and those whose focus is largely pedagogic.

In terms of the technology OEPS did not set out to improve the knowledge base. Rather it set out to take what already existed, particularly within the OU but also in other Scottish HEIs with experience in MOOC delivery, and apply and test it in new ways. Given that very little existing

research has focused on the role of OERs in widening participation (one of the few exceptions is a European 'state-of-the-art' review of OERs in adult education, co-authored by Alison Littlejohn), there was therefore a clear gap in knowledge, to which OEPS could potentially have made a distinctive contribution.

Finding evidence that OEPS did indeed make such a contribution is straightforward. The KPIs anticipated 'a series of issue based briefing papers' which summarised the state of the art in particular areas. No precise target was set in terms of numbers, but there was indeed a series of briefing papers, and the interviews with external bodies confirm that these were used, and are valued.

A search on Google Scholar using the terms 'open educational resources' and 'widening participation' throws up an OEPS academic journal article as its first-placed result; the third, fourth and sixth results also derive from OEPS. A search using 'open education' and 'Scotland' produces articles derived from OEPS in second and third place. I conclude from this that not only has the OEPS project addressed a gap in existing understanding, but that it has made a recognised contribution to knowledge in this area.

Establishing a firm judgement of the quality of that contribution is less straightforward. The project team identified four peer-reviewed journal articles and seven peer-reviewed conference papers arising from OEPS. Three of the four papers are in one journal (*Widening Participation and Lifelong Learning*) which is published by the Open University. Its editors describe their intended audience as 'researchers, policy makers and practitioners' who are interested in widening participation. The fourth paper was in the *Journal of Interactive Media in Education*, also published by the Open University, which also aims to shape practice as well as research.

The selection of journals suggests, then, a concern with reaching a mixed audience of practitioners and researchers. The conferences similarly reflect a concern with reaching practitioners as well as researchers, with a particular focus on specialist audiences in open education. None of the outlets is regarded in the research community as 'high impact' or as highly competitive, at least judged by the conventional criteria for those assessments, but they do have a wide reach that spans disciplines and functions.

Finally, a preliminary analysis of citation rates for the three journal articles published before 2017, using Google Scholar and excluding self-citations (see table), confirms that the project is commanding attention in the scholarly community; however, it is too early to estimate the longer term scale and significance of this impact.

Table 1. Citation rates for OEPS journal articles pre-2017

Title	Citations at 19 June 2017
Widening access and OER: developing new practice	5
Towards open educational practice	4
Lifelong learning and partnerships: rethinking the boundaries of the university in the digital age	0

Objective 8: Evaluate various economic models of openness

As yet this objective has not been met, and it is unclear how it can be met within the period. The project team agrees that this objective has not yet been achieved.

The project plan prepared for the second Steering Group meeting took an ambitious view of this objective:

> The project will undertake an evaluation of various economic models of openness. To date most of the funding for OERs and OEP has come from the public sector or philanthropic organisations. HEIs have invested in open and freely available resources for reasons of institutional reputation building, long term student recruitment and the potential for reducing costs. This project will explore the role of partnerships in funding open educational practice such as charging fees for support workshops or OER service delivery. It will also evaluate alternative economic models of openness including crowd funding, subscriptions and freemium.

It set a delivery date for this of December 2015.

Subsequently the Steering Group addressed the topic at several of its meetings. The SG received a year one update for its fourth meeting, which reported that 'We have been collecting and collating information and evidence of business models for the creation and use of OER and OEP and we will produce a report on these findings in early 2016'. The February 2016 SG update flagged the issue as 'green', stating that 'A costed model of OER is being developed, scheduled for summer 2016'. The February 2016 SG noted that the business models paper had been due for that meeting and was told that a paper would be circulated by August 2016. The SG discussed desirable features of a business model paper in October 2016, but did not return to the issue at its March 2017 meeting.

An eight-page report on business models was uploaded on the OEPS website on 27 July 2017, briefly comparing the costs and benefits of an OER approach as compared with a MOOC model. At present, the team believe that the OER model is apparently looking considerably more cost effective. They also emphasise that there are non-economic reasons for adopting open educational practices, including compatibility with other strategic goals such as widening participation, or because it promotes the institutional profile and mission, as well as comparing with the costs and benefits of other activities to achieve similar results.

All of that being said, progress on the eighth priority seems to have been considerably slower than planned. This is a pity not just because it represents a deviation from the original proposal and subsequent work plan. Even if the original plan for this priority was excessively ambitious (as I think it was), it could easily have been scaled back to manageable proportions. The project team and SG on a number of occasions gave a clear rationale themselves for examining the business models of OERs/OEPs. And it is hard to see how the policy could have had a wider policy impact without a clear and uncomplicated economic analysis of the costs and benefits of OER/OEP as compared with alternative means of reaching similar goals.

THE PROJECT'S STRATEGIC IMPACT

This section of the report considers the project's overarching aims, which were:

- To facilitate best practice in open education in Scotland through the development of a peer support network, an online hub and awareness raising activities.

- To enhance the Scottish tertiary education sector's capacity and reputation in developing publicly available online materials supported by high quality pedagogy and learning technology.

In addition, it addresses the questions of legacy and sustainability.

Facilitating best practice

So far as best practice is concerned, the project has made a considerable contribution through its networking, information and awareness raising activities. As noted above, the project developed an online peer support network through the Hub; and it has made a major contribution to awareness-raising. While the OEPS Hub has been closed, the functions and resources associated with it will continue on a different platform.

In addition, the project bolstered its awareness-raising activities on the ground with an impressive social media presence. The OEPS Twitter account was created in June 2014. By 29 June 2017 the account had attracted 957 followers, and posted 2,315 Tweets. A quick analysis through tweetreach.com showed that the 87 OEPS Tweets between 11 and 20 June had received 78 retweets; the most frequently retweeted in that period (6) was a link to a conference abstract, tweeted originally by the project team.

The OEPS blog started in December 2015, and since then has carried 68 posts. The content of the post varies, from announcements of new courses to reports on events and more reflective 'think pieces'. As of 20 June, the OEPS blog had 38 followers. According to one of the project team, activity on the blog was highly correlated with the intensity of posting, with the largest level of interest being for announcements of new courses. The numbers of views and viewers both peaked in 2015, but have remained steady throughout. It is of course not possible to be entirely confident about what lies behind these simple figures, other than that the blog clearly attracted wider interest.

Table 2. OEPS blog activity

Blog activity	Views per month	Visitors per month
2014	514	225
2015	927	388
2016	747	297
2017 (to June 21)	890	360

Capacity and reputation of the Scottish tertiary education sector

Assessing OEPS' impact on the tertiary education sector in Scotland is more complex. Taking a broad view of the tertiary sector, there has indeed been an impact on capacity and reputation, which can be particularly clearly evidenced in the way that OEPS has engaged with a wide range of third sector organisations to build capacity, and with a smaller group of third sector organisations to develop new OERs. What is less easy to evidence is impact on the tertiary education sector more narrowly defined, which effectively is the area of provision for which SFC has direct responsibility: HEIs and colleges.

It should be recognised that the project did engage with both HEIs and colleges. As well as the OU, five Scottish HEIs had representatives on the Steering Group; albeit at a later stage, so did the College Development Network; and the SFC was represented throughout.

Higher education institutions have been well represented at OEPS events. An internal analysis of people attending the four Forums showed that over half of those who were not part of the project team came from 17 different HEIs. The interviews with academics at HEIs who were not partners again showed a level of engagement with and awareness of OEPS, though views differed on how far OEPS was engaged at strategic level.

The first annual report from the project stated that 'We report on a regular basis to the Universities Scotland Learning and Teaching Committee'. I understand that for the first year, the then Director of OU in Scotland reported to the Committee, and that after Prof. Miller moved to another position that role was taken by Professor Coton, a member of the Steering Group on behalf of the University of Glasgow.

The Steering Group discussed engagement with higher education at its third meeting in February 2015, advising the project team to liaise with the SHED (Scottish Higher Education Developers) network. OEPS did indeed engage with SHED, and requested that OEPS become a standing item on its agenda. OEPS subsequently prepared reports for discussion at SHED meetings, most recently at Stirling University in May 2017. The SG returned to the topic in September 2015, encouraging the project to engage cross-sectorally with Universities Scotland's Learning and Teaching Committee and with deans of learning and teaching across the sector. In March 2017, four months before the project came to an end, the SG suggested that the project should engage with Universities Scotland's work around the Commission on Wider Access. The SG also steered the project to engage with the QAA Scotland enhancement themes, which it duly did.

In spite of these efforts, within the project there seems to have been a view that HEIs as a whole were not particularly responsive to the potential of OERs. The first OEPS annual report pointed to the challenges of engaging strategically with higher education institutions. According to the report, interest in and capacity for supporting open education were confined to the minority of institutions already involved in delivering MOOCs. According to the second yearly report, HEIs in Scotland showed less awareness than the third sector of open education, and 'while there are areas of good practice and engaged staff, there are relatively few links between staff engaged in open practice and WP practitioners'. Interviews with the project team suggest that HEIs were not persuaded that they should collaborate for the greater good in the production and promotion of OERs.

Nor was the project able to make significant inroads into the college sector. Scotland's colleges offer a 'mixed economy' of higher and further education, and partnerships with Scotland's HEIs are relatively well developed, particularly through articulation arrangements. There is also some experience of open education; as well as activities in individual colleges, in 2012 the College Development Network launched Re:Source, a platform designed to support the sharing of learning and teaching resources collected from various sources, including JORUM and Coleg. Re:Source no longer exists, and its website now redirects users to resources and courses under the brand CDN LearnOnline.

The project engaged with colleges, as with HEIs, through its networking, awareness-raising and capacity-building activities, as well as the survey of current practice. However, the first annual report for OEPS noted the relatively weak position of open education in the college sector, and noted preliminary discussions involving TQFE providers, the College Development Network and specialist college staff. In interviews, members of the project team reported that in the face of feedback from workshop participants and others in the sector, as well as a high level of personnel changes in colleges and in CDN, they concluded that individual college staff had little time and few resources for innovation, and that therefore they had focused on trying to embed the idea of open education in the TQFE. As noted above, the results of this were limited, meaning that the project's impact on the college sector was relatively low.

One option explored by the Steering Group was to seek to engage with the sector through the process initiated by the Open Education Scotland Declaration. This led to work by the team on a Concordat to follow up the declaration, described in a briefing paper for the February 2016 SG as intended to 'provide a framework for the development of OER and OEP and will set a benchmark for these. It will be developed with the engagement of the HE sector'. The SG emphasised the importance of engaging with educational organisations at top level, and helping to promote 'greater awareness of and buy-in to the Open Scotland Declaration at senior management level'. It suggested a number of changes to the draft, and agreed that it would be discussed with the Scottish Higher Education Enhancement Committee and presented to Universities Scotland's L&TC (SG 2 February 2016).

If the SG discussed the Concordat again I could not find it in the minutes, even under matters arising from the previous meeting. In interview I was told that the SG believed that the principle of partnership across the sector was desirable in principle but that policy development in institutions was not yet ready for it. The March 2017 SG meeting, in the course of a discussion of the project update, recorded the view that 'a year ago it looked like many more HEIs would be going to adopt the Open Scot Declaration or create policy on open education, however restructuring has derailed this'.

Overall, then, it looks as though strategic impact on the tertiary sector was an opportunity missed. This was not for want of ambition: the first meeting of the Steering Group in May 2014 was convinced that the project would have a wider policy and societal impact:

> *It was agreed that the project had the potential to have a high profile and attract interest politically. It would be important to show impact: provide evidence of where OERs have made a tangible difference to society and the Scottish economy.*

It went on to suggest that 'The project should be ambitious and look to export Scotland's expertise and reputation in HE internationally' (SG 2 May 2014). For whatever reason, and the most obvious is the response it encountered from HEIs and colleges, this ambition seems to have evaporated.

My own judgement is that more could have been expected. Particularly in respect of HEIs, it has not been possible to find evidence that the project built on its relationship with senior decision-makers in Universities Scotland and the Scottish Funding Council to promote strategic debate over Scotland's role in and contribution to open education.

LEADERSHIP, ORGANISATION AND SUSTAINABILITY

Overall, the project seems to have been largely well managed and effectively organised, with some interruptions caused by personnel changes. While I have not seen budget statements, I understand from interview that the project will end well within budget; and as stated above, I believe that the majority of its aims and objectives have been met comfortably, and in some cases exceeded.

While the project was managed within the OU, overall strategic direction was overseen by the Steering Group. The OU, as budget holder, is responsible for appointing the project director and chair of the steering group, who in practice is the Director of the OU in Scotland. Because of staff changes, there have been three OUiS directors (one of them acting) and thus SG chairs during the life of the project. In addition, there have been three project managers a result of personnel changes, as well as a substantial period of sick leave. While none of these changes was fatal, they inevitably involved some disruption and discontinuity.

The Steering Group comprises representatives from the OU, the University of Strathclyde, the University of Glasgow, the University of Edinburgh, the University of the Highlands and Islands (UHI), and the Scottish Funding Council. In addition the College Development Network appoints a member.

The Steering Group met seven times in the life of the project. Meetings took place in May 2014, July 2014, February 2015, September 2015, February 2016, October 2016 and March 2017. Meetings were in my judgement thoroughly minuted, with sufficient detail of discussions to allow me to understand how particular decisions had been reached.

The first meeting of the Steering Group in May 2014 was informed that 'The steering group's primary role is to set the project's overall direction and check its progress towards the achievement of agreed outputs'. The evidence suggests that it has largely done so, but with two exceptions. First, the SG did not sufficiently pursue the repeatedly delayed presentation of the analysis of business models. Second, my own judgement is that it did not make the most of its members' capacities, standing and connections in ensuring an effective strategic payoff from the project.

The Steering Group discussed and approved a set of key performance indicators at its meeting of September 2015. The KPIs were incorporated into the project report submitted to the following SG meeting, leading to agreed actions to address any areas receiving an 'amber' alert. The SG

regularly received financial updates, hearing routinely that the project was on budget. By the time of the second yearly report in 2016, the project team stated that 'The project is on track to meet expected outputs and on budget for a projected end-date of 31st July 2017'. In fact, OEPS is set to record an underspend.

One organisational issue that arose in interviews concerned perceived complexities around the situation of the Open University in Scotland. For some, the OU, and to some extent OUiS, is perceived as a non-Scottish HEI whose centre of gravity is in Milton Keynes. This was mirrored in some of the forums, where some early evaluation feedback indicated dissatisfaction over the relative profile of the OU in the project. Some uncertainty about the OU's precise role and position is probably inevitable in Scotland, and overall I have not found evidence of any identifiable negative effects.

The Steering Group discussed sustainability on a number of occasions, and received and discussed a legacy plan at its March 2017 meeting. As well as covering the future of the resources and materials associated with the project there are also plans for access to support at the OU. While some of the non-academic partners said in interviews that their strong preference would be for the project to continue beyond July, they were pleased to know that they would be able to complete the planned OERs. My impression is that within the boundaries of the possible, legacy has been handled well.

CONCLUSIONS AND RECOMMENDATIONS

SFC's investment in OEPs was a significant one, reflecting a high level of policy interest in enhancing Scotland's capacity and reputation in online learning across tertiary education. The aims and objectives of the project were ambitious, as well as broad in scope. While based on a partnership of HEIs, it set out to benefit the wider tertiary sector as well as a range of other stakeholders. The evidence reviewed here suggests that the project largely met the eight objectives set for it. While it has yet to produce a thorough analysis of economic models of openness, it has produced evidenced achievements against all the other seven objectives set out in the project proposal.

The proposal also identified two overarching aims for the project. The first required OEPS to facilitate best practice in open education in Scotland. It has demonstrably done so, through peer networking, its blog and other online activities, workshops, presentations, briefings, and engagement with partners. It did so on a considerable scale, and has taken care to plan effectively for the project's legacy.

The second aim was concerned with enhancing 'the Scottish tertiary education sector's capacity and reputation in developing publicly available online materials supported by high quality pedagogy and learning technology'. I have suggested above that the project contributed to this aim, but that its contribution was limited. On the one hand it undertook the development with partners of fourteen new OERs (six of which had been launched by the end of June 2017), some of which not only recruited well but also showed retention rates well above those experienced in comparable courses elsewhere. The completion rates, as well as more impressionistic evidence, suggest that the OERs were indeed underpinned by an appropriate approach to pedagogy. The project staff also devoted considerable attention to disseminating these aspects of OEPS' work to the wider communities of educational developers and scholars and practitioners in learning technology and widening participation outside Scotland as well as within it.

At the same time, my judgement is that at a strategic level the project made less of an impact on the tertiary sector than it might have done. Partly this arose from a focus on third sector partners as a vehicle for widening participation in open education, as well as the lack of a clear national policy steer, but I also conclude that the only part of the project with the ability to secure a strategic impact – namely the SG - did not view this as an area where it had particular opportunities and responsibilities.

Given that OEPS has now reached the end of its allotted span, recommendations have been kept to a minimum and are chiefly concerned with maximising the legacy:

- The opportunity remains to inform the development of a distinctive national policy on open education. The OUiS is probably best-placed to take this forward by promoting a dialogue with Government and sector-wide bodies on the lessons learned from OEPS.
- Strategically, colleges and most universities are still in the early stages of developing a policy on open education. SFC should consider whether in the light of OEPS, it should now encourage institutions to develop policies and use them in their forward plans.
- SFC and Universities Scotland should consider whether there is greater scope for collaborative development of open education in Scotland, or whether it is better for institutions to decide whether they seek partners elsewhere.
- SFC and Colleges Scotland should similarly consider the scope for collaborative development of open education in Scotland, as compared with leaving institutions to decide whether they develop capacity for promoting open education.
- There was evident enthusiasm among interviewees, particularly in third sector organisations, for continued opportunities to network and build further capacity. HEIs and colleges should consider whether this is a process that they could support, possibly in partnership with SCVO.
- I commend the OU for agreeing to host the OEPS products after the project ends, and urge the University to continue to brand these products distinctively for at least two years.
- QAA in Scotland should consider whether developments in open badging have reached a stage that requires a review of existing recognition practices in higher education

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