Evaluation of the William and Flora Hewlett Foundation's Investment in International Policy Advocacy for Open Educational Resources

Prepared by ORS Impact

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Evaluation Purpose and Background

This evaluation, supported by the Hewlett Foundation, provides an independent analysis of the progress, impact, and coherence of the strategies utilized by two intergovernmental organizations—the Commonwealth of Learning (COL) and the United Nations Educational, Scientific, and Cultural Organization (UNESCO)—to advance Open Educational Resources (OER) both independently and jointly. The purpose of the evaluation is to inform the Hewlett Foundation's international OER strategy and the strategies undertaken by the two organizations. It also informs the broader field of OER advocacy by positioning these efforts within the broader OER landscape.

The Hewlett Foundation's Support of OER

The William and Flora Hewlett Foundation has been supporting organizations to help grow OER internationally since 2002. The Hewlett Foundation's goal is to "equalize student and teacher access to high-quality, openly licensed educational materials that offer opportunity for people everywhere to share, use, and reuse knowledge" (Education Program Strategic Plan October 2010). Since 2011, these investments have become increasingly focused on lowering policy barriers to OER and encouraging the development of new policies that create incentives for OER adoption and production.

With previous support from the Hewlett Foundation, two intergovernmental organizations—COL and UNESCO—assessed the current status of governments' OER policies through the *2012 World OER Survey*, and catalyzed action through the adoption and implementation of the *2012 Paris OER Declaration*. The latter was adopted during the World OER Congress held in June 2012 at UNESCO headquarters. With the two-year funding from the Hewlett Foundation that recently concluded, COL and UNESCO undertook a series of activities designed to integrate OER into teaching and learning in selected locations including Kenya, Indonesia, Oman, and Trinidad and Tobago. Table 1 on the following page summarizes the activities of each organization.

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Table 1 | Activities Undertaken by COL and UNESCO

Organization	Activities	Geographies of Focus
COL	Promote the use of OER by decision makers to enhance education access and quality and to build capacity among education institution staff and policymakers	• Kenya • Trinidad & Tobago
	Advocate for OER inclusion in regional policy development	• East Africa • West Africa
UNESCO	Advocate for OER	• Indonesia • Kenya • Oman
	Support the development of national OER policies	
	Develop and implement teacher capacity training through OER using the Information and Communications Technology Competency Framework for Teachers (ICT CFT)	

Methods Overview

The evaluation focused on three levels of inquiry: 1) country, 2) intergovernmental organization, and 3) the Hewlett Foundation's grantmaking approach. The Hewlett Foundation, COL, and UNESCO staff were engaged in the process of developing and refining the key questions that guided ORS Impact's evaluative efforts.[1] ORS Impact's mixed method evaluation design utilized document review and in-depth interviews as the primary methods to address the key evaluation questions. Documents reviewed included COL and UNESCO publications related to OER and work in the focus countries, progress reports, and workshop summaries. In-depth interviews were conducted by telephone or video conference with 44 key informants from three classes of respondents (staff, consultants and external observers, and local partners), who provided insight on four geographies of focus (Indonesia, Kenya, Oman, and Trinidad and Tobago).

Limitations

Every evaluation design has strengths and limitations. Notable limitations in this evaluation relate to reliance on secondary documents and telephone interviews. We were unable to travel to any countries to directly observe the use or creation of OER or to observe interactions between staff, consultants, and local partners. To mitigate this limitation, the design explicitly included a wide range of perspectives through telephone or video conference interviews, including talking to staff, consultants, local partners, and external observers.

[1] The reference group for the evaluation included Dana Schmidt and Jacqueline Nader (Hewlett Foundation), Carlyn Orians (ORS Impact), Asha Kanwar and Vis Naidoo (COL), and Zeynep Varoglu, Fengchun Miao, Jaco Du Toit, and Jozef Vaessen (UNESCO).

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In addition, we were unable to conduct the desired number of interviews in Oman and Indonesia. We spoke with only two local partners in each of these countries, although staff and consultants were able to provide additional insights into progress and challenges in these locations. Language barriers may have played a role in limiting responses to our request for interviews. Language differences and technological communication challenges also sometimes played a role in the intelligibility of the interview data.

Figure 1 | Key Informant Interviewees by Interviewee Type

Progress in Kenya, Oman, Indonesia, and Trinidad and Tobago

Accomplishments during Two-year Period

At the conclusion of the project, COL was able to move OER forward in the two countries in which it directly engaged, Kenya and Trinidad and Tobago. Awareness within selected institutions has been greatly enhanced and local champions have emerged. Institutional policies are in place in both Trinidad and Tobago (University of West Indies School of Business and Applied Studies, or ROYTEC) and Kenya (Network of Non-Formal Education Institutions). More importantly, these policies are beginning to shape education in both institutions. Teachers are actively engaged with

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OER content and ROYTEC is rolling out the first course utilizing OER. If the model is successful, the goal is to replicate it with other courses within ROYTEC and then expand it to other institutions within Trinidad and Tobago or other countries in the region.

In the countries where UNESCO engaged (Indonesia, Kenya, and Oman), awareness within the Ministries of Education has been enhanced and local champions have emerged. National policy is either in place or under development in all three countries. Implementation has lagged behind, but the project was successful at reaching the pilot stage, with teacher training among a small cohort either completed (Indonesia), in progress (Kenya), or nearly ready for implementation (Oman).

While incremental progress was made in each country, staff narratives reflect a *"broader systems perspective."* That is to say, they intend for the impacts to extend beyond these discrete projects, so that OER sustains the Hewlett Foundation's investment.

> *"[I would] like to see it become very mundane, something that everybody says yes to, [is] ingrained in our work . . . like people always make it part of the discussion. If you're making a cake, it becomes part of the ingredients and not just the cherry on top."* – Staff

> *"As with many things, the uptake of OER to become 'mainstream,' the new normal, will take many years . . . Naïve of us to think we would get there this quickly."* – Staff

Staff expect to see a shift in norms in the countries and institutions, though they acknowledge this may take a long time.

Conditions that Affect Progress

The following emerged as categories of conditions influencing progress across the focus countries:

Technology. Nearly all key informants mentioned access, connectivity, and/or bandwidth as barriers to OER implementation and use in their respective country or region.

> *"Access has not been solved anywhere . . . not a function of size of country or economy. [It is] really about national priorities."* – External observer

Pedagogy. Introducing OER necessarily leads to questions about the role of teachers and students in the learning process. Teaching traditions and student learning models are resistant to change, and this resistance is both individual and institutional. At the individual level, teachers, especially older teachers, have established ways of doing things. At the institutional level, structures to support curriculum development and the acquisition of teaching materials, as well as systems for rewarding teachers, are based on traditional education models and will need to adapt to OER.

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Hidden Costs. Several interviewees mentioned the hidden costs of OER, including time and resources to develop OER materials, translation costs, and host platforms. As one key informant indicated, someone inevitably absorbs these costs, yet they are not often acknowledged.

OER Content. Key informants across geographies indicated a need for a greater variety of OER. Since most content thus far has been produced in the United States and Europe, there is a strong tendency to approach OER initially with a consumer mindset; educators are less likely to realize the value of what they produce or see themselves as "producers" of OER. Additionally, most OER that exist are in English. It is critically important for non-English speaking countries to engage in translation and new content generation.

Keeping with this theme, a few key informants noted the lack of a central repository for derivatives of existing resources. As OER authorship grows, platforms for housing and/or sharing OER may become a limiting factor.

> *"Where do people put things when they redevelop them? That is a key problem . . . Little guidance so far from COL and UNESCO on that. We could be getting more. They have done a lot about the process of taking and editing but not as much on where you put it."* – External observer

Sociopolitical Events. In some countries, sociopolitical events have impacted the pace of change. For example, national elections had a destabilizing effect in Kenya, leading to changes in personnel and periods of time when clarity about direction and responsibility was lacking. There has also been an increase in social unrest, diverting attention from educational goals. A teacher strike temporarily delayed the rollout of teacher training.

Copyright Literacy. Another issue that tends to arise after resources are developed is copyright and licensing. These concepts are not well understood outside of the United States and Europe. This lack of understanding presents both an opportunity and a challenge, particularly in Indonesia and Oman. The opportunity lies in building on the idea of freely sharing resources, which is well ingrained in many cultures. The challenge is to develop an appreciation for the copyright licensing norms that exist in other countries, and to work within this context to develop systems that are aligned with international standards and protocols.

Institutional Complexity. The variety of governmental organizations and/or units with responsibility for education complicates efforts to integrate OER across all countries. Government bureaucracy within countries can also slow progress.

Opposition from Publishers. Although it seems as though publishers would likely oppose the OER movement in all of the focus countries, only those with insights on Kenya mentioned experiencing resistance from publishing companies.

> *"Publishing companies that are trying to sell training module, they'll tell you, you better use theirs. They are the only ones against OER."* – Staff

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Implications for Country Selection

These experiences suggest that the ability to make progress within a country depends on existing relationships between the intergovernmental organizations and the selected country, relative political stability, ICT infrastructure, and local champions. In addition, although it is nice to have support at the highest levels of the Ministry, it may be more important to have a core team of 3-5 individuals who are in positions that can champion implementation and are less caught up in the political winds. These factors play an important role in deciding which countries to select for OER implementation.

Regardless of selection, it is important to be patient and let leadership grow within the country. Staff and consultants on-site must strike a careful balance between directly supporting the work and building local champions' capacity and confidence to own the work.

Strategies for Advancing OER

At present, the OER field is still in its infancy. There is a body of research underway that should yield a better understanding of successful strategies for mainstreaming OER, but as of yet there is no "gold standard" against which to evaluate current advocacy efforts. COL and UNESCO have taken two distinct approaches to this work. UNESCO focuses on awareness building, national policy adoption, and teacher training, while COL focuses on institutional policy and implementation. In this evaluation, we explored interviewees' thoughts on the relative impact and complementarity of each strategy.

Complementarity of Awareness Building, Policy Adoption, and Capacity Building

UNESCO explicitly focused on three concurrent activities to advance OER in focal countries: awareness building, policy adoption, and teacher training. A consensus emerged among UNESCO staff and local partners that all three activities were *"symbiotic"* and "*mutually reinforcing*." UNESCO staff articulated the importance of following up quickly on awareness-building activities with focused policy discussions in what they described as a *"1-2 punch"* approach. Staff also noted that those who are responsible for policy adoption are not necessarily the same people who are engaged in implementation. They stressed the importance of *"overarching policy to encourage and guide teachers to use, develop, and create OER"* as well as pairing this with activities that *"get teachers engaged."*

Key informants described all three UNESCO activities as important and "*very crucial*," but responses differed on the relative importance of each activity and the appropriate sequence. Some staff spoke to strategically beginning with awareness and then moving to policy and teacher capacity, whereas others said the entry point should be wherever you can gain access. It was noted that teacher capacity efforts need not wait for policy as long as there is no policy that

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explicitly impedes teachers from engaging in OER. One consultant claimed that policy is not necessary for developing awareness or demonstrating its utility through a pilot effort, but becomes important later to take it to scale: "*If pilot runs nicely and we want to scale up, that's when you need policy*."

COL utilized a different approach, focusing on institutional policy and implementation rather than national policy. This is consistent with its long-standing relationships with universities and open schools and its expertise related to implementation and utilization of OER. None of the key informants claimed that policy, whether national or institutional, was the most important; instead it was described as an "*enabling condition*" and the basis upon which OER could gain traction within a country or institution.

Key informants stressed the need for flexibility in approach, noting that the right entry point is very context specific. Important elements of that context include presence of local champions and infrastructure, perceived need, opportunities to build on previous work, and relationships.

Complementarity of COL and UNESCO

Overall, COL and UNESCO are viewed as aligned, and staff, consultants, and local partners perceive the two organizations as having complementary expertise and strengths. To guide their efforts, they maintain a joint UNESCO-COL work plan, updated every three years, "*that maps out what we want to achieve*" and who is responsible.

While aligned, they also bring different strengths to the table, and each is seen as able to amplify the work of the other. For example, UNESCO is able to take COL's work with Anglophone countries and interpret for the benefit of Francophone and Lusophone countries. Similarly, COL is able to translate big picture frameworks into concrete usable implementation support materials. Figure 2 contrasts the perceived roles and strengths of the two organizations.

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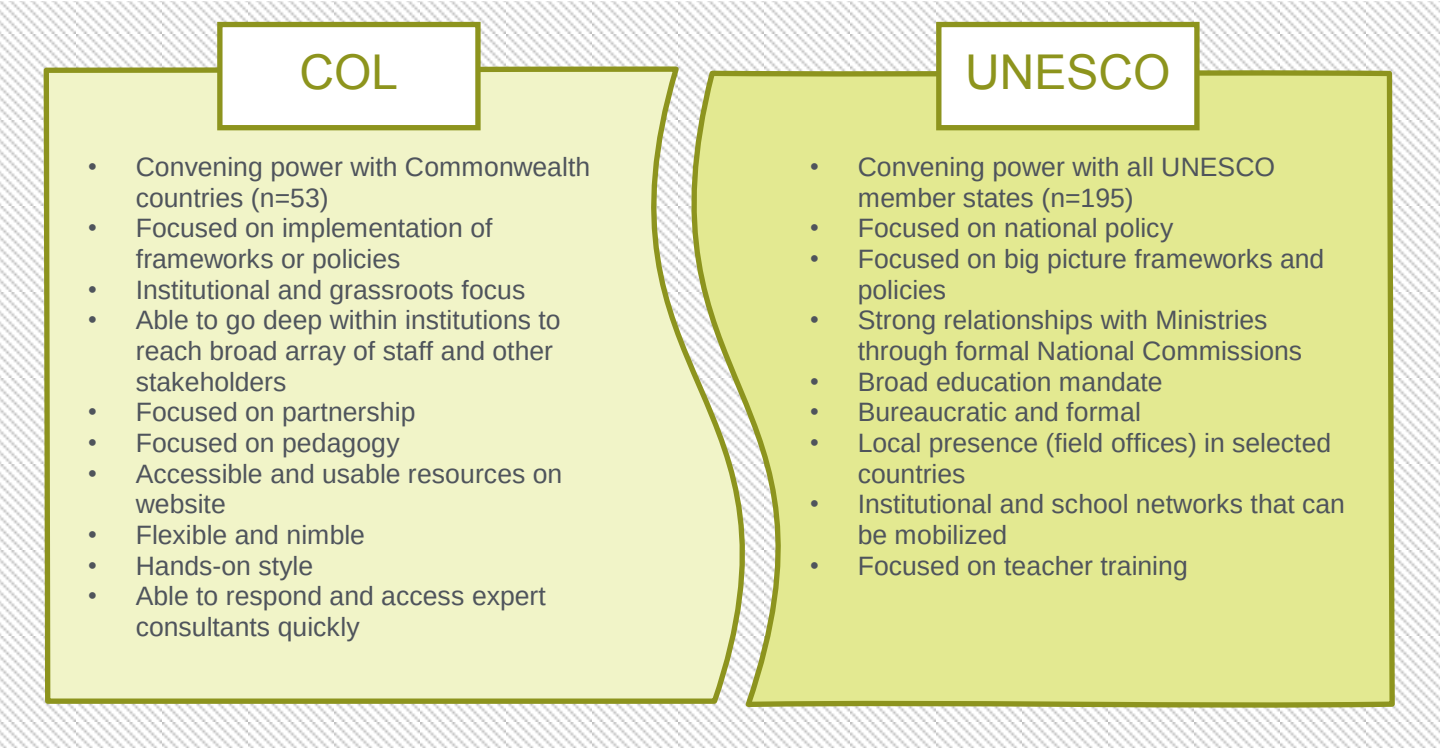
Figure 2 | Perceived Roles and Strengths of COL and UNESCO



COL and UNESCO serve—for the most part—different countries. COL has 53 member countries with a similar history, a common language (English), and similar educational and legal systems. UNESCO, in contrast, has 195 member states that represent a wide diversity of languages and educational and legal systems.

Of the countries included in this evaluation, COL and UNESCO only overlapped in Kenya. COL focused on institutional policy and implementation, whereas UNESCO focused on national policy and developing a pilot teacher training program. Unlike their collaboration leading up to the *2012 Paris OER Declaration*, their recent work in Kenya was described as coordinated, but not collaborative in nature.

> *"No overlap, just complementarity."* – Staff

> *"Clear division of labor."* – Staff

Engagement Strategies

The interviews revealed several engagement activities that proved effective regardless of geographic context: stakeholder engagement, consultative workshops, local staff and consultants, regional networks, and tangible examples.

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Stakeholder Engagement

Key informants stressed the importance of engaging with local stakeholders in a manner that empowers them to take ownership of and champion OER. They cautioned that external staff or consultants should be careful not to overshadow or discourage the work of internal champions and must possess a realistic understanding of the project challenges.

Cultivation of internal champions is needed to sustain the work beyond the engagement of the intergovernmental organizations. Identifying on-the-ground champions who can navigate the local context, including political champions (e.g., Ministries of Education) and institutional or administrative champions (e.g., curriculum developers, faculty, and lecturers) is a key to success.

> *"We have been finding that the local outreach that needs to take place in any particular country is really quite extensive and needs to persist over time in order to sustain change. If you don't have that set of local champions, it can be difficult to get anything to happen."* – Consultant

Ideal champions are reliable and long-term. However, it is important to foster several champions at any given time to ensure sustained support. For example, in Trinidad and Tobago, local champions were developed at multiple levels through trainings that included faculty and staff serving in many capacities within ROYTEC. This strategy is perceived by key informants to create a *"critical mass,"* forge stakeholder ownership of institutional policies, ensure better implementation (including adapting and sharing materials), and sustain disruptions, such as turnover in personnel. It has also resulted in awareness, buy-in, and capacity to use OER throughout ROYTEC.

Consultative Workshops

Both COL and UNESCO used in-person consultative workshops as a strategy for engagement. Key informants reported that these workshops bring together stakeholders— including individuals who are not yet aware of or engaged in OER efforts — who, in many cases, come out of the workshop as champions. Convening new and active champions builds awareness and support and allows participants to cross-pollinate experiences, converge on issues, and build a repertoire of resources.

> *"They can influence each other but it doesn't happen naturally. When UNESCO and COL organized workshops and brought different institutions together in workshops we find that they hadn't engaged with each other previously."* – Staff

Key informants suggested that the workshops were key in developing local ownership and influencing the pace of progress.

Workshops also played an important role in COL's work within a single institution. In Trinidad and Tobago, COL and its consultants were credited with delivering a series of high-quality workshops at ROYTEC that resulted in awareness and enthusiasm for OER at multiple levels.

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The following qualities were described as central to the success of these workshops:

- Used a "hands-on" approach
- Replicable models/quality policies and resources were shared
- Facilitators demonstrated how to adapt policies and resources to reflect the needs of an institution or country
- Went deep into policy and implementation (including repurposing programs and courses) to demonstrate how OER can be institutionalized
- Next steps were identified for participants
- Continued technical support was offered to participants following the workshops in the form of ongoing advice/critique of policies

Local Staff and Consultants

UNESCO employed the strategy of having an on-site staff member (in Kenya) and a local consultant (in Indonesia) who could serve as a bridge between UNESCO and the communities on the ground. Local partners were reportedly more trusting and receptive to UNESCO when there was a local liaison who was fluent in the language, understanding of the local context and customs, and could sustain the momentum of the work.

> *"[The local staff member] has been brilliant. He was on the ground chasing, soothing, holding hands, adding funding for transport or catering, coaxing along. Another reason why Kenya so successful."* – Consultant

> *"[The local consultant] works better in Indonesia. She understands local language and can tell when they need support or when they're on top of it."* – Consultant

In contrast, Oman has neither an active local UNESCO office nor a local consultant with the language and cultural skills to provide material support for OER development. Thus, progress there has been slower. While a few local partners have taken ownership of the project, they have been on their own to a greater extent than in other countries.

Regional Networks

In their in-country work, COL built on strong established relationships and partnerships that were regional in nature:

- The work in Trinidad and Tobago built on established relationships with the Virtual University for Small States of the Commonwealth (VUSSC).
- The Kenya Symposium advanced the work COL was engaged in with the Commonwealth Open Schools Association (COMOSA).

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In both cases, COL was able to leverage these regional networks to develop and spread awareness, empower champions, and put OER into practice.

Tangible Examples

Key informants talked about both *"proofs of concept"* and *"proof points"* as effective strategies for understanding and demonstrating *"What is OER and how can it really help solve my problem?"* Together, these tangible examples provide clarity of concept, show what is possible, demonstrate the potential and feasibility of application, and offer best practices and lessons learned that are rooted in experience.

> *"Seeing is believing. They need to see proof. So we brought in real experiences that work."* – Staff

> *"Examples are what kindle the conversation and offer proof."* – Consultant

Informants talked about the need for both, emphasizing that the African continent in particular still needs to see that OER is a viable method (proof of concept), while all areas need to see models of successful implementation (proof points). Key informants also suggested that compiling a repertoire of best practices would be useful to member states.

Regional Strategies

In addition to in-country work, COL chose to engage two powerful regional organizations, the Economic Community of West African States (ECOWAS) and the East African Community (EAC). COL selected this strategy because of their potential to influence and support the spread of policies and OER uptake in their respective regions.

At this stage, it does not appear that engagement with these organizations has resulted in advancing regional policies, nor has it advanced policies within member countries. Challenges have included other regional priorities (e.g., Ebola outbreak), lack of capacity (e.g., staff stretched thin), and lack of funding. Although informants could envision a role for regional policies and OER infrastructure in the future, in the short term, ECOWAS and EAC might have more potential as venues to help spread awareness of successful models from one member country to another (similar to how the VUSSC and COMOSA networks are leveraged).

Generally speaking, regional exposure and sharing has been shown to spur action. For example, in Trinidad and Tobago ROYTEC is being positioned as a model that others in the VUSSC network and Caribbean region are expected to emulate. Similarly, Kenya learned from Namibia, India, and Bangladesh, and now Rwanda is modeling efforts after Kenya. Once one country has made progress, it seems clear that they can serve as an example and motivator for others in their respective region.

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Paris Declaration

The *2012 Paris OER Declaration* is considered a milestone in the OER movement, conferring legitimacy for OER and providing a framework and reference for the work of COL and UNESCO staff, consultants, and policy makers across the globe (see Appendix A). Staff of the intergovernmental organizations noted that the regional congresses leading up to the Declaration were equally important in raising awareness about OER and developing a common international understanding of the issues and potential partners.

> *"It is a major milestone in the OER field because it represents all nations represented by UNESCO coming out with a declaration in support of OER use in their respective countries."* – Consultant

Utility as a Framework

For COL and UNESCO staff and consultants, *"[The Declaration] provides a clear framework with which to focus activities."* While it is not a binding resolution, it is widely viewed as influential. It lays out the core components of what needs to be done to further OER, provides an anchor for those working to advance OER, and influences the form local OER initiatives take.

> *"The Paris OER Declaration went a long way to laying out the core components of what needs to be pursued . . . and has led to countries pursuing their own OER initiatives that are aligned to but maybe not a direct result of the Declaration."* – Consultant

Limits to Impact

Key informants readily pointed to the growing movement toward OER, and described a *"groundswell of interest and knowledge"* leading up to and since the 2012 Paris meeting. They also remarked on the frequency with which it is referenced in policy papers and by those in policymaking positions. However, informants were reluctant to directly attribute OER developments to the Declaration. They were also quick to point out that awareness has spread much faster than implementation. The Declaration has promoted awareness of OER and increased support for OER at the highest levels, but its existence alone does not spur action or adoption by teachers and key institutions. Although the Declaration may have been necessary, it was not sufficient for integrating OER into mainstream practice.

Implications for the Future

It is reasonable to conclude that revisiting the *2012 Paris OER Declaration* on its five-year anniversary would provide an additional stamp of legitimacy. However, the evaluation found that the activities that lead up to a declaration are where much of the real work of generating OER awareness takes place. This suggests that moving forward, equal attention should be paid to the

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regional activities that precede the Declaration. Regional meetings should be used to lift up new voices, provide examples, and generate new champions. In the end, the Declaration may serve a largely symbolic, albeit important, function.

Benefits of OER

Value that Resonates

Tangible benefits associated with OER mentioned by informants include increasing access to education, minimizing the cost of learning materials, and increasing the quality of education. Access is an important consideration for reaching non-traditional students and those currently not in school. This argument carried considerable weight in Kenya, for example, where cost is a salient argument for institutions experiencing budget cuts. Cost is less salient in resource-rich Oman, although a drop in the price of oil can send ripples through their education budget. Quality is both a concern and an opportunity. While we were told by staff that resistance to OER is sometimes framed as a concern about quality, providing teachers with access to resources that they can use and adapt to enhance the quality of their lessons is one of the central benefits. Creating and sharing OER that are culturally and linguistically relevant is a strong argument in many locations.

To realize these goals, teachers must have access to and freely share relevant materials, incorporate them in their teaching, and actively engage in the production and/or adaptation of OER. This is not yet a reality in any of the focus countries. To date, there is limited use of OER by teachers, and in all three countries, the development of OER lags behind the adoption and customization of existing materials.

These findings are consistent with emerging findings from other research on OER in developing countries, which is beginning to uncover evidence that teacher competence and self-confidence are major barriers to full implementation (based on personal communication with external observers currently engaged in research).

Implications for the Future

To move beyond policy and fully integrate OER into mainstream practice in these and other countries in which COL and UNESCO work, attention has to be paid not only to the infrastructure to support OER, but also to building competencies and changing mindsets and systems that support full participation in the creation and sharing of relevant OER. Proof points should be used to make the case for OER's value and feasibility by providing actual models of OER creation and use that can be translated or scaled for use in other countries. Research on the business case for OER should be helpful, but examples are also powerful. This project has succeeded in developing some pilots—both teacher training and actual course delivery utilizing OER—that can serve as examples.

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It is also important to encourage the continued development of OER content in non-English languages and to meet specific educational course needs. It is also clear that additional education around copyright law is needed.

Roles in Advancing OER Globally

Effective Roles for Intergovernmental Organizations

There was consensus among key informants that COL and UNESCO are uniquely positioned to advance the OER agenda in most countries because of their long-standing formal relationships and the trust they have built over time. The two organizations are viewed as aligned, with complementary roles and strengths.

One question that arose during discussion of the evaluation findings was whether COL and UNESCO should serve in a catalytic role or engage with countries in an ongoing manner. Intergovernmental organizations could reach more countries by initiating the OER movement and then leaving it in the hands of local champions to build out. Conversely, intergovernmental organizations could provide more continuous support in fewer countries by supplying ongoing technical assistance and financial support for the sustained development of OER.

Staff and partners alike spoke to the need for local ownership in the long run so that OER becomes self-sustaining within a country. However, local partners confirmed the value of ongoing relationships and being part of a network and group for continued support and learning.

> *"Once you start working with COL, you progressively keep working with them . . . so you're part of a network."* – Local partner

Similarly, we also heard about the power of example in stimulating OER development within regions. Models that can be translated and scaled are in demand. Longer engagements in selected countries or institutions might be required to develop and document models that others can use. Thus, a blend of approaches might be the best path. While a catalytic role is important, it may need to be balanced with continuous engagement that supports model development and ongoing sharing.

Local Ownership and Champions

External organizations like COL and UNESCO have a powerful role in building awareness and mobilizing action. Effective entry appears to happen though many channels, including through institutions and ministries, and the sequence of activities is similarly flexible; there is no right order in which to build capacity and craft policies. Whichever path is taken, building local champions and facilitating local ownership is key. Without that, implementation will not be sustained.

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Informants noted that the development of champions must be ongoing and occur at multiple levels of government. This will help the movement weather inevitable staff turnover and changes in political leadership.

Other Roles Needed

To further OER in these countries of focus, informants noted potential roles for a wider group of participants:

Private Sector. A few key informants suggested that engaging the private sector might help address the high costs of technology, which remains a barrier to access in Kenya among other countries. Although technological infrastructure is outside of COL and UNESCO's scope, this strategy could ensure the OER movement is sustainable and not overly reliant on the Hewlett Foundation's investment.

Open Source Learning Platforms. One key informant in Kenya suggested that UNESCO and other key players partner with Coursera or other OER platforms (e.g., Moodle) to help build the capacity of education professionals to integrate open source learning platforms into their practice.

Institutions. Key informants suggested that UNESCO and others in the OER landscape expand the network of institutions (primary, secondary, and tertiary) that are engaged in OER to expand reach. Institutions can also play an important role in training new teachers and developing curriculum that utilizes OER. In Kenya, one key informant suggested that institutions connect faculty to participate in the teacher training program and/or to incentivize faculty to integrate OER into teaching and learning.

> *"The culture of open knowledge underlying OER movement encourage[s] teachers and students to become more active knowledge creators instead of information consumers, and therefore, foster the deep learning and knowledge creation. But strategies need to be developed to incentivize teachers' continuous creation and sharing of high-quality resources."* – Staff

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Conclusion

The Hewlett Foundation is well-respected in the OER landscape for its leadership and its strategic investments. Through its support of COL and UNESCO, two highly-regarded intergovernmental organizations, strides have been made since the *2012 Paris OER Declaration*. Taking two distinct approaches to the work, they have succeeded in building awareness, capacity, and policies to support OER, both at national and institutional levels, in the countries and regions where they focused their efforts. There is no one strategy or point of entry that fits all cases, but the experiences in these countries suggest the importance of building on relationships, providing consultation that spans multiple levels within ministries or institutions, and building local champions who can sustain the work.

The ultimate goal is to generate the capacity and local ownership to make OER part of standard practice in local education delivery systems. The movement has not yet developed to that stage. In the short term, there is still an important role for external organizations to play, including providing tangible examples and models of policies, supporting policy implementation, and promoting the development of linguistically- and culturally-relevant OER content. To further the movement, it will be important for new voices to be lifted up who can showcase accomplishments and serve as examples for others to follow.

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Appendices

APPENDIX A: 2012 Paris OER Declaration

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2012 WORLD OPEN EDUCATIONAL RESOURCES (OER) CONGRESS
UNESCO, PARIS, JUNE 20-22, 2012

2012 PARIS OER DECLARATION

Preamble

The World OER Congress held at UNESCO, Paris on 20-22 June 2012,

Mindful of relevant international statements including:

The Universal Declaration of Human Rights (Article 26.1), which states that: "Everyone has the right to education";

The International Covenant on Economic, Social and Cultural Rights (Article 13.1), which recognizes "the right of everyone to education";

The 1971 Berne Convention for the Protection of Literary and Artistic Works and the 1996 WIPO Copyright Treaty;

The Millennium Declaration and the 2000 Dakar Framework for Action, which made global commitments to provide quality basic education for all children, youth and adults;

The 2003 World Summit on the Information Society, Declaration of Principles, committing "to build a people-centred, inclusive and development-oriented Information Society where everyone can create, access, utilize and share information and knowledge";

The 2003 UNESCO Recommendation concerning the Promotion and Use of Multilingualism and Universal Access to Cyberspace;

The 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expression, which states that: "Equitable access to a rich and diversified range of cultural expressions from all over the world and access of cultures to the means of expressions and dissemination constitute important elements for enhancing cultural diversity and encouraging mutual understanding";

The 2006 Convention on the Rights of People with Disabilities (Article 24), which recognises the rights of persons with disabilities to education;

The declarations of the six International Conference on Adult Education (CONFINTEA) Conferences emphasising the fundamental role of Adult Learning and Education.

Emphasizing that the term Open Educational Resources (OER) was coined at UNESCO's 2002 Forum on Open Courseware and designates "teaching, learning and research materials in any medium, digital or otherwise, that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions. Open licensing is built within the existing framework of intellectual property rights as defined by relevant international conventions and respects the authorship of the work";

Recalling existing Declarations and Guidelines on Open Educational Resources such as the 2007 Cape Town Open Education Declaration, the 2009 Dakar Declaration on Open Educational Resources and the 2011 Commonwealth of Learning and UNESCO Guidelines on Open Educational Resources in Higher Education;

Noting that Open Educational Resources (OER) promote the aims of the international statements quoted above;

Recommends that States, within their capacities and authority:

a. *Foster awareness and use of OER*.
Promote and use OER to widen access to education at all levels, both formal and non-formal, in a perspective of lifelong learning, thus contributing to social inclusion, gender equity and special needs education. Improve both cost-efficiency and quality of teaching and learning outcomes through greater use of OER.

b. *Facilitate enabling environments for use of Information and Communications Technologies (ICT).*
Bridge the digital divide by developing adequate infrastructure, in particular, affordable broadband connectivity,

widespread mobile technology and reliable electrical power supply. Improve media and information literacy and encourage the development and use of OER in open standard digital formats.

c. *Reinforce the development of strategies and policies on OER.*
Promote the development of specific policies for the production and use of OER within wider strategies for advancing education.

d. *Promote the understanding and use of open licensing frameworks.*
Facilitate the re-use, revision, remixing and redistribution of educational materials across the world through open licensing, which refers to a range of frameworks that allow different kinds of uses, while respecting the rights of any copyright holder.

e. *Support capacity building for the sustainable development of quality learning materials.*
Support institutions, train and motivate teachers and other personnel to produce and share high-quality, accessible educational resources, taking into account local needs and the full diversity of learners. Promote quality assurance and peer review of OER. Encourage the development of mechanisms for the assessment and certification of learning outcomes achieved through OER.

f. *Foster strategic alliances for OER.*
Take advantage of evolving technology to create opportunities for sharing materials which have been released under an open license in diverse media and ensure sustainability through new strategic partnerships within and among the education, industry, library, media and telecommunications sectors.

g. *Encourage the development and adaptation of OER in a variety of languages and cultural contexts.*
Favour the production and use of OER in local languages and diverse cultural contexts to ensure their relevance and accessibility. Intergovernmental organisations should encourage the sharing of OER across languages and cultures, respecting indigenous knowledge and rights.

h. *Encourage research on OER.*
Foster research on the development, use, evaluation and re-contextualisation of OER as well as on the opportunities and challenges they present, and their impact on the quality and cost-efficiency of teaching and learning in order to strengthen the evidence base for public investment in OER.

i. *Facilitate finding, retrieving and sharing of OER.*
Encourage the development of user-friendly tools to locate and retrieve OER that are specific and relevant to particular needs. Adopt appropriate open standards to ensure interoperability and to facilitate the use of OER in diverse media.

j. *Encourage the open licensing of educational materials produced with public funds.*
Governments/competent authorities can create substantial benefits for their citizens by ensuring that educational materials developed with public funds be made available under open licenses (with any restrictions they deem necessary) in order to maximize the impact of the investment.

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