

OER HUB RESEARCHER PACK

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THE OER HUB RESEARCHER PACK



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INTRODUCTION

Welcome to the OER Hub Researcher Pack. This pack provides a set of useful resources for anyone conducting research in open educational resources. All of the material is CC-BY licensed, so can be adapted and reused as you see fit, provided it is acknowledged. It is a collection of material arising from the work of the [OER Hub](#) at the Open University in the UK. The intention is that researchers in OER can find useful tools that they can adapt (and hopefully share back with the community).

This pack concentrates on the tools we have developed. If you are more interested in **how** to conduct open research, then we have produced an open course, available also as an open textbook: [Open Research](#).

The links in this ebook to the various resources will go to the OER Hub website, to ensure the latest version is referenced. However, the Researcher Pack is also available as a zip file download so if you are reading offline, simply locate the corresponding folder.

We hope there is something of interest here, and look forward to hearing about any use, or adaptation, that occurs.

The OER Hub Team

CHAPTER 1.

ETHICS

Operating in the open raises new forms of ethical issues. If you are interested in exploring these issues more in-depth, then the [Open Research](#) course has [a section on Ethics](#). This is partly based on our experiences as open researchers, but also draws on the basic principles of research ethics and moral philosophy. This section contains a framework designed to help you think through the ethical issues around your own open research as well as other kinds of research intervention.

The questions that might arise from operating in the open include: When can data be shared? What differences does openness make to our obligations and responsibilities to others? Is it always right to use openly available data from social networks? Should open researchers use absolutely anything as research data? What and when should you disseminate?

You may need to pay particular attention to these aspects when conducting open research. Most research projects will require ethics approval, and it is good practice to have an Ethics framework that demonstrates how you will approach the research, and that you have considered the ethical issues involved. The OER Hub Ethics Framework may provide a useful basis for this, although it will obviously vary according to country and institution and

should not be interpreted as a legal document. It can be found here: <http://oerhub.net/reports/oerrh-ethics-manual/>

CHAPTER 2.

DATA

One aspect of open research is releasing your data openly, and also learning to use the data of others. Many funders will now mandate that data from projects they fund is released under an open licence. This benefits the community as a whole as it allows comparison between projects and also leads to researchers providing different analyses of data that may not have occurred to the original researchers. It is not without its issues however. Firstly, as a researcher you will want to ensure that you have conducted the analysis and written any articles from the work before you release it, so that you do not find yourself in the position of someone else writing up your work. Equally, the data itself should be seen in the same light as a research publication; you do not want to wait too long before making it available to others. Knowing when to release the data is important.

Another issue is ensuring that data is sufficiently anonymised. When you have decided from the outset of a research project that data you collect will be released openly, protecting participants' identities becomes a priority. In the OER Research Hub we collected over 7,000 survey responses from educators, librarians, formal and informal learners, from 175 different countries, at K-12, community college and higher education levels. This was using the [survey bank](#)

of questions, which is also openly available. The survey data can be accessed on Figshare in [.csv](#) or [Excel file](#) formats under a CC-BY license: you are free to download it, add more data to it, carry out a different analysis, etc., with acknowledgement. How has this file been anonymised? Removing information on respondents' gender, age or country of origin, for instance, would have also eliminated an important pathway into the analysis, so we retained these variables but deleted IP addresses and contributions to open-ended questions.

If you intend others to use your data, then you will need to add as much metadata as possible; tags will help others find your shared files, but consider too including information about how the dataset originated, what analyses have been carried out already, etc.

CHAPTER 3.

SURVEY QUESTIONS

Getting access to good quantitative data in education research, such as test scores, can often be problematic for a variety of reasons. This kind of empirical data can be very useful for demonstrating impact, for example that the introduction of open textbooks on a course led to an improvement in overall performance of the cohort. However, you may be unable to get this sort of data, or be interested in other issues, such as perceptions of content, attitudes to OER, understanding the context, etc. For this type of research, surveys can be very useful.

The OER Research Hub used and openly released a set of 54 core survey questions, which comprised of demographics, teacher and learner specific questions and questions specifically aligned to each of the eleven hypotheses that underpinned the project's research.

Selected hypotheses were aligned to individual research collaborations and provided a consistent framework for the project's research activity. This common bank of questions therefore enabled comparison across different user groups, e.g. teachers and learners in both non-formal and formal contexts and across different sectors (e.g. higher education, college or further education, informal learning and school or K12). You can review the

reusable and remixable, CC BY licensed, question bank (a copy is also available in [the Appendix](#)).

Some hypotheses were applicable only to specific collaborations whilst in some instances hypotheses were better answered through looking at other data sources or by reviewing selected responses to questions (e.g. demographics and other questions).

A quick checklist of things to consider when designing your survey:

- Are your survey questions answering your research question(s)?
- Is a survey the best way of gathering evidence for your research question(s)? Data for the OER Hub's Hypothesis C ("open education models lead to more equitable access to education, serving a broader base of learners than traditional education") was better addressed by combining demographic information (the "broader base of learners") with responses to questions for Hypotheses A and B, for example;
- If you're planning to carry out further research, e.g. interviews, will you be using the survey as a way of identifying potential volunteer participants? If so you will need to add in further questions at the end of the survey.
- Ensure each question counts and think of your respondents... keep the survey as short as possible!
- Don't ask people irrelevant questions;
- Don't forget appropriate ethical clearance when planning your survey (see the [Ethics](#) chapter) and provide an opening statement at the start of your survey to advise potential

participants on the survey's purpose, how long it will take to complete, how you will use and store survey data, etc. We've provided an example from the project below.

There are several reasons why you might want to repurpose existing survey questions. The questions used and devised by the OER Research Hub were informed by nine existing surveys on open resources and practices. You can find out more about these surveys and the [background to survey question creation here](#).

- One benefit of reusing existing survey questions is that they have already been tested 'in the field' and refined accordingly;
- Reusing questions can save you time rather than 'reinventing the wheel';
- Reusing survey questions might enable you to generate comparative data in instances where a corresponding dataset is openly available. For example, the [OER Hub data set is openly available](#).

Using the OER Research Hub survey questions

Before you review the OER Research Hub questions it is important to be clear about the purpose of your research. This will help you identify questions that you would like to reuse.

Here is an overview of the types of questions provided by the OER Research Hub:

No(s)	Type of question	Aim of question(s)
1_1 – 1_9	Demographic questions	Basic information about participant
1_10	Question regarding ways in which participant has accessed internet	Find out how and where participant usually accesses internet
1_11	Question noting a range of online activities that participant may have participated in or done in last year	Insight into range of activities and level of digital literacy of participant
1_12 – 1_14	Questions for learners in both non-formal and formal contexts	Find out more about why, where and how learner studies
1_15	Question asking participant why they use a particular resource/website etc.	Ascertain reason for using (in this instance) a particular open resource
1_16 – 1_21	Questions aimed at educators, including subjects taught and those where OER is used, open practices, length of teaching etc.	Insight into educator practice
2_1 – 2_2	Questions for Hypothesis A “Use of OER leads to improvement in student performance and satisfaction”	Likert scale questions regarding the perceived impact of OER on students (for educators) and perceived impact on formal studies (for students)

3_1 – 3_15	Questions for Hypothesis B “The open aspect of OER creates different usage and adoption patterns than other online resources”	This set of questions begins with the Hewlett definition of OER. These questions should be used prior to any from Hypothesis A (see note below) and cover use, type and reason for using OER, challenges when using OER, open licensing and sharing practices
4_1 – 4_2	Questions for Hypothesis D “Use of OER is an effective method for improving retention for at-risk students”	As the spreadsheet narrative notes there are better ways of answering this hypothesis than via a survey. However two questions for educators on perceptions of at-risk students and the impact of OER have been included
5_1	Question for Hypothesis E “Use of OER leads to critical reflection by educators, with evidence of improvement in their practice”	A question for educators to self-access the impact of OER on their own practice
6_1 – 6_3	Questions for Hypothesis F “OER adoption at an institutional level leads to financial benefits for students and/or institutions”	Questions for both learners and educators regarding OER cost savings
7_1	Question for Hypothesis G “Informal learners use a variety of indicators when selecting OER”	Question to ascertain what features of a resource are most important to users (aimed at informal learners and but can be used with educators too)
8_1	Question for Hypothesis H “Informal learners adopt a variety of techniques to compensate for the lack of formal support, which can be supported in open courses”	Question to ascertain what techniques learners use to support themselves in their learning when not within a classroom context
9_1 – 9_3	Questions for Hypothesis I “Open education acts as a bridge to formal education, and is complementary, not competitive, with it”	Questions regarding likelihood of doing certain activities as a result of using OER and whether use of OER by formal learners prior to signing up for a course influenced their decision

10_1	Question for Hypothesis J "Participation in OER pilots and programs leads to policy change at an institutional level"	Question asking educators whether their institution has an OER policy
11_1 – 11_2	Question for Hypothesis K "Informal means of assessment are motivators to learning with OER"	Question to both ascertain what features learners and educators have encountered when using open resources and what they would find motivating

It is important to note that although the hypotheses are listed in order, the questions provided are not necessarily in the order you should use them in. For example the definition of open educational resources (OER) that is provided at the start of the Hypothesis B questions should be provided before any questions from Hypothesis A (where the term OER is used but not defined) or those that use the term 'OER' are used. When you are designing your survey ensure that you introduce definitions at the appropriate point in your survey.

It is important to capture some information about your participants that will enable you to 'slice' the data in interesting ways and make claims about different groups of users. For example, do you want to make comparisons between different age groups or between participants from different parts of the world? Demographic questions will help you obtain relevant data and thus has a crucial role to play in your survey. Question 1_1 to 1_9 in the question bank provide some basic demographic questions that you might want to consider using at the start of your survey.

Before you ask your participants some basic information about themselves, you will need to provide some information about the

survey itself for your potential participants. This will help them decide whether they want to participate in your research. An example OER Research Hub survey (the 2014/2015 OpenStax College student survey) is shown below, with a narrative (in red) explaining what each component of the text seeks to achieve.

OpenStax College Student Survey

About This Questionnaire

Background information about the survey, who the survey is aimed at and what the survey data will be used for

This questionnaire is being conducted as part of a project which is investigating how people think and use different types of online resources. You have been invited to take this survey because you use OpenStax College textbooks.

The research is being carried out by The Open University (UK) in collaboration with OpenStax College, and is funded by the Hewlett Foundation in order to support future excellence in open education. Your answers will help us build a picture of how people across the world use online resources for learning and teaching. Our research data will help people around the world make more informed decisions about online teaching and learning.

All the answers you provide to the following questions will be held securely and our data protection policy complies with the UK's Data Protection Act (1988) and the USA's Protection of Human Subjects (45 CFR 46). Let potential participants know how you will store their data, how long it will take to participate in the survey, what they are consenting to by participating (e.g. how you will use their data) and how the survey works (e.g. whether questions are compulsory/optional etc.)

The survey should take around 20 minutes to complete. All questions are optional and you can stop at any time by closing your browser. Completion of the questions in the survey that follows indicates that you have read and understood the above consent and consent to participate in this research. By answering the survey questions below, you are granting us use of your anonymized data for research and dissemination purposes. Anonymity is the default in this survey; upon completion you will be invited to provide contact details should you wish to participate in further research. This is entirely optional.

If you have questions regarding this study, you may contact OER Research Hub by email: oer-research-hub@open.ac.uk Provide contact information in case people want to get in touch with you with questions etc.

Minors under the age of 18 should not proceed until their parents have given them permission to complete this survey. By clicking the "Next" button below I am affirming that I am either 18 years or older or that I have my parents permission. This survey was aimed at college and university students, however because it was openly available and anyone could potentially participate this statement ensures that nobody under the age of 18 participates without the consent of their parent(s) or guardian(s).

Once you have introduced your survey and asked some basic demographic questions, you can begin to structure your survey. As noted earlier, be careful about the ordering of questions. At the end of the survey you might want to ask for volunteers for follow-up research (describe what this might be and ask for relevant contact details) and thank people for their participation. Where possible, provide a URL to your project or personal website for people to find out more about your research.

When reviewing the question bank you might want to change the language used in a question or add other options into particular questions. During the OER Research Hub project and because of the collaborative nature of our work, it was often the case that questions were tweaked slightly. This is not in and of itself a problem but you do need to consider how much (if at all) this will weaken any comparisons you might want to make with existing data for these questions.

Finally, as good practice and in the spirit of openness, consider sharing how you used the questions and what your research findings were with the wider community and with us.

CHAPTER 4.

INTERVIEW QUESTIONS

As well as conducting surveys and gathering comparative data, a good method to gain a deeper insight into a particular approach, or attitudes towards OER is to conduct interviews. This can be as a result of a follow-up from a survey, or by seeking specific individuals (for example, policy makers).

The OER Research Hub developed a set of [interview questions](#) (a copy is also available in [the Appendix](#)) which are available under a CC-BY licence. Interviews can be structured, semi-structured and unstructured. Which of these options you choose will depend on the purpose of interviews in your overall methodology. Structured interviews allow for comparison and to ensure certain areas are covered, but can be restrictive. Unstructured are useful for explorative work when little is known about the topic, but the range will vary depending on the interviewee. Semi-structured allows some flexibility within a pre-defined format. Interviews provide a good method for exploring a subject in depth, expanding on survey findings and matching with quantitative data.

CHAPTER 5.

EVALUATION FRAMEWORK

The Hewlett Foundation *Evaluation Principles and Practices* states that 'evaluation is an independent, systematic investigation into how, why, and to what extent objectives or goals are achieved' (Twersky & Lindblom, 2012, p. 3) whilst the Kellogg Foundation (2012, p.2) *Framework for Evaluation* states that evaluation should provide 'ongoing, systematic information that strengthens projects during their life cycle, and, whenever possible, outcome data to assess the extent of change', adding that 'the evaluation effort should leave an organization stronger and more able to use such an evaluation when outside support ends'. The JISC *Six Steps to Effective Evaluation* handbook (Glenaffric Ltd, 2007, p.2) states that evaluation 'can and should be viewed as an essential and important element to a well-managed project that recognises the value of timeous insights into the project's progress and successful outcomes' and 'can be defined as any organised activity that helps draw out the value and prove the worth of development projects'.

Evaluating a project then is an important aspect of demonstrating that it has achieved what you initially set out to

do, and checking the project whilst in operation. That might seem obvious but evaluation is often an afterthought, and by then the measurements and records that would have made for useful evaluation are not available. It is better then to build it in from the start. It is not just that this allows you to more easily and effectively perform the evaluation, it also helps structure the project. Asking questions such as “what do we ultimately want to achieve?” and “How will we know if the project has been successful?” will provide a clearer plan.

The objectives of project evaluation often include:

1. Developing a body of knowledge about what works, what does not work, and why;
2. Improving the quality of a project;
3. Identifying successful processes and strategies for replication and expansion;
4. Modifying unsuccessful processes and strategies;
5. Measuring the impact of a project and the benefits for stakeholders;
6. Giving stakeholders a say in the project output and quality;
7. Demonstrating to funders the effectiveness of a project.

The OERRH evaluation framework is intended to achieve all of these objectives. You can see our evaluation framework here: <http://oerhub.net/research-outputs/reports/>. In it we sought to answer the following questions, which might form a useful basis for your own evaluation:

- What aspect(s) of the project should be evaluated?

- Who is the evaluation for?
- What is it they want to find out?
- What evaluation methods will be used?
- What changes will be made when the results are gathered?
- What are the evaluation criteria and what is their source?
- When will the evaluation take place?
- Who will be involved in the evaluation?
- What constraints will be placed upon the evaluation?
- How and when will the evaluation results be disseminated?

CHAPTER 6.

ARTICLES

In this section we provide a set of publications from the OER Hub which you may find interesting to read. The full set of articles is available in [‘Publications’ on the website](#), and listed in the [Bibliography](#). All of the articles have been published in open access journals as we believe that all publicly funded research outputs should be openly available, but particularly those that are in the subject area of OER. It also means we retain the ownership of the articles, and so are free to distribute them in this pack for example.

OER Hub Report [OER Evidence Report 2014](#) – this is the main report of evidence against the 11 hypotheses regarding OER use

Some key OER Hub articles are as follows:

Personalising learning through adaptation: Evidence from a global survey of K-12 teachers’ perceptions of their use of open educational resources

It has been suggested that open educational resources (OER) can lower cost and lead to greater flexibility, however while there has been significant investment in opening up content there have been few studies looking at how these resources are perceived by those who might use them. This quantitative article contributes to fill a gap in our knowledge of how K-12

educators teaching in face-to-face, online and blended contexts currently think about and use OER. The authors report findings from a survey of 600+ schoolteachers who answered a set of attitudinal and behavioural questions in relation to how they use OER, what types of OER they use and what influences their selection of content, in addition to the purpose, challenges and perceived impact of OER in the K-12 classroom. The research highlights how OER allow schoolteachers to personalise learning through adaptation, and argues that mainstreaming OER in K-12 education is not only a matter of raising awareness but of changing teachers' habits.

de los Arcos, B., Farrow, R., Pitt, R., Weller, M. & McAndrew, P. (2016). Personalising learning through adaptation: Evidence from a global survey of K-12 teachers' perceptions of their use of open educational resources. *Journal of Online Learning Research*, 2(1), 23-40. Association for the Advancement of Computing in Education (AACE). <http://www.editlib.org/p/151664>

Who are the Open Learners? A Comparative Study Profiling non-Formal Users of Open Educational Resources

This paper presents the results of a systematic survey of more than 3,000 users of open educational resources (OER). Data was collected between 2013 and 2014 on the demographics, attitudes and behaviours of users of three repositories. Questions included a particular focus on the behaviours of non-formal learners and the relationship between formal and non-formal study. Frequency analysis shows that there are marked differences in patterns of use, user profiles, attitudes towards OER, types of materials used and popularity of different subjects. The experience of using OER is fairly consistent across platforms in terms of satisfaction and impact on future behaviour. On the whole, non-formal learners surveyed were

highly positive about their use of OER and believe they will continue to use them. With regards to this making formal study more likely some degree of polarization was observed: some believed formal study was now more likely, while others felt it made this less likely. On the whole, while non-formal learners are enthusiastic about using free and online resources, the language and concept of OER does not seem to be well understood in the groups surveyed.

Farrow, R., de los Arcos, B., Pitt, R., & Weller, M. (2015). Who are the Open Learners? A Comparative Study Profiling non-Formal Users of Open Educational Resources. *European Journal of Open, Distance and E-learning*, 18(2). <http://oro.open.ac.uk/4496>

The Impact of OER on Teaching and Learning Practice

The OER Research Hub has been investigating the impact of OER, using eleven hypotheses, and a mixed methods approach to establish an evidence base. This paper explores the findings relating to teaching and learning. The findings reveal a set of direct impacts, including an increase in factors relating to student performance, increased reflection on the part of educators, and the use of OER to trial and supplement formal study. There are also indirect impacts, whose benefits will be seen after several iterations. These include the wide scale reporting of adaptation, and the increase in sharing and open practice that results from OER usage.

Weller, M., de los Arcos, B., Farrow, R., Pitt, B., & McAndrew, P. (2015). The Impact of OER on Teaching and Learning Practice. *Open Praxis*, 7(4), 351-361. [doi:10.5944/openpraxis.7.4.227](https://doi.org/10.5944/openpraxis.7.4.227)

Mainstreaming Open Textbooks: Educator Perspectives on the Impact of OpenStax College open textbooks

This paper presents the results of collaborative research between OpenStax College, who have published 16 open textbooks to date, and the OER Research Hub, a Hewlett funded open research project examining the impact of open educational resources (OER) on learning and teaching. The paper focuses primarily on the results of two surveys that were conducted with educators during 2013 and 2014/2015. These surveys focused on use and perceptions of OER and OpenStax College materials, financial savings and perceptions of impact on both educators and students. This paper reports on the research findings related to the impact of OER on educator practice and make a series of specific recommendations based on these findings.

Pitt, R. Mainstreaming Open Textbooks: Educator Perspectives on the Impact of OpenStax College open textbooks (2015) The International Review of Research in Open and Distributed Learning (IRRODL) 16 (4): 133-155 <http://www.irrodl.org/index.php/irrodl/article/view/2381>

CHAPTER 7.

INFOGRAPHICS

Infographics can be a useful means of displaying information to key audiences. Although they do not capture the depth of research, they can be a concise way of getting across key findings, particularly to audiences who might not read a full journal article.

If you have the budget to employ a designer, great. If not, it's easy to create infographics using online tools; free versions of these tend to be basic and limited but they work perfectly fine. At the OER Hub we used Piktochart (piktochart.com) but there is also Canva (canva.com) or Easel.ly (www.easel.ly), for instance.

When creating an infographic, keep it simple; don't pack too much in. Highlight interesting data, key findings, important messages, then add a link to the full report (if there's one) for those who want to learn about the research in more detail.

Use a meaningful headline; make it clear to your audience what the infographic is about.

Trust your colleagues to cast their eyes over your first draft and comment on improvements, i.e. is everything sufficiently clear?

Make sure your data is accurate; cite your sources.

If you can, create your infographic in different formats, give it a Creative Commons license and allow others to share it via their social networks.

CHAPTER 8.

OER HUB BIBLIOGRAPHY

This is a list of OER Hub publications, and conference presentations.

Reports

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APPENDIX

OER Research Hub Interview Question Bank

Introduction

This Interview Bank provides a selection of questions generated by the OER Research Hub research team. A selection of these (or versions of these) questions have been used during fieldwork conducted during the project.

As the project focuses on the impact of OER on learning and teaching, questions have been contextualised to specific roles within this context, e.g. educator, student or manager. However, they can be modified according to your own requirements.

Questions for different groups of interviewee have been placed under the relevant hypotheses. There are two version of the hypothesis name given (the simplified version is given in brackets). Some questions replicate core questions from our questionnaire bank. The questions have been loosely ordered into “sets” with

related questions, in addition to providing extra stand-alone questions.

How to use these questions

Some hypotheses are complimentary and relate to specific sectors (e.g. informal learning). In addition, some questions under one hypothesis may help provide information for other hypotheses (e.g. Hypothesis E on critical reflection of educators). Some of these synergies are noted in the text (where appropriate). To help you use the following sets of hypotheses questions more effectively, we have mapped them as follows:

General Questions for Use in Interviews

Please could you tell us your name and position and say a few words to introduce yourself.

What do you think are the biggest challenges in education today?

What do you think the future of education looks like?

Could you give me three words to describe [project/resource/initiative]?

At the end of an interview: Is there anything else you'd like to add?

Hypothesis A: Use of OER leads to improvement in student performance and satisfaction (OER improve student performance/satisfaction)

Questions for Educators and Managers

Have you used OER in the classroom? If not, why not? If so...

What has been your experience of using OER in the classroom?

What kinds of impact, if any, has use of OER in the classroom had on your students? Can you give me an example(s)?

Since you started using OER in the classroom, has there been any change in your teaching practice?

Are you satisfied with the quality of OER materials you have encountered?

Do you think OER helps motivate students?

Have you seen an improvement in student performance and/or satisfaction as a result of using OER?

Do students benefit from using OER? If so, in what ways/how?

Have you benefited from using OER? If so, in what ways/how?

Have there been any challenges to using OER?

Do you think we should have more, or less, OER? Why?

Do you think it is in the interests of an institution to promote and use OER? Why? Why not?

Questions for Students

What has been your experience of using OER for your studies?

Since you started using OER, have there been any change to the way that you learn?

Do you feel that you are less or more motivated to study when using OER?

Has the use of OER made a difference to your studies? If so, how? Why?

Are you satisfied with the quality of OER materials you have encountered?

Have there been any benefits to using OER?

Have there been any challenges to using OER?
Do you think we should have more, or less, OER? Why?

Hypothesis B: The Open Aspect of OER creates different usage and adoption patterns than other online resources (People use OER differently from other online materials)

Questions for All

How do you find resources online?

What kinds of resources do you look for?

Do you look specifically for resources that are open? If so, why?

How do you look for OER?

Has anybody ever recommended that you use a particular resource?

How do you use these resources?

Do you use open resources differently [to those that are not open]?

Do you adapt the resources you find?

If you adapt them, why? What do you do?

Can you give me an example?

What did you do to adapt these resources? Do you have any particular way you approach adaption?

Is open licensing important to you?

When you see that a resource does not have a CC license, does this make a difference to your use of that resource?

Do you think that CC licensing encourages different kinds of study behaviours?

In an educational context, and perhaps more widely, what does “openness” mean to you?

Open licensing through Creative Commons is one of the ways in which OER are identified and shared. But when we make something free and easy to copy it can be hard to tell what kind of influence this licensing has. What impact do you think ‘openness’ has in education?

Hypothesis C: Open Education models lead to more equitable access to education, serving a broader base of learners than traditional education (OER widen participation in education)

Questions for Educators

In your experience of either using OER, or being aware of OER initiatives, have you come across any examples of OER widening participation or improving access to education?

Hypothesis D: Use of OER is an effective method for improving retention for at-risk students (OER can help at-risk learners to finish their studies)

Questions for Educators

Within your own educational context, how would you describe an “at-risk student”?

Have you used OER with at-risk students?

What kinds of OER did you use? In what ways did you use this OER? Did your use of OER within this context differ from your normal use? What impact, if any, did using OER with at-risk

students have? What kind of feedback, if any, did the students give you?

Is there a particular group of students that you think stand to benefit the most from using OER?

Which group of students stand to benefit the most from OER?

**Hypothesis E: Use of OER leads to critical reflection by educators, with evidence of improvement in their practice
(OER use leads educators to reflect on their practice)**

Questions for Educators

Please note that questions for Hypothesis D re: use of OER with at-risk students could also provide indirect evidence for hypothesis D.

How has your use of OER had an influence in the way you think about teaching?

What have you learnt from using OER?

What changes have you experienced [as a teacher] as a result of using OER?

How has your involvement [e.g. in a particular project/use of a particular OER] changed the way you think about teaching?

How has your involvement [e.g. in project] changed the way you teach?

From your point of view, describe a story that epitomizes the most significant change that has resulted from your participation in [e.g. in a particular project/use of a particular OER] .Why was this story significant to you?

How do you use resources you find online? If you adapt them,

what do you do? Can you give me an example? How did you go about adapting the resources? What kind of approach did you take?

Hypothesis F: OER adoption at an institutional level leads to financial benefits for students and/or institutions (OER adoption brings financial benefits for students/institutions)

These questions are aimed at educators and students who are making use of OER within the context of pilots/institutional adoption of specific resources/state-wide initiatives etc. However, although this hypothesis specifically refers to institutional adoption of OER, all questions could be used where open textbook/whole course OER/specific resources are being used.

Questions for Students

Have you made financial savings through using OER? How?

What is your impression of the total savings you have made as a results of using OER in the past year?

Has OER made it possible for you to engage in study which you would otherwise not have been able to afford?

Questions for Educators and Managers

Could you tell us more about how your institution adopted the OER you are using?

What kind of savings for students who use this OER, if any, have you seen?

Do you think students have saved money by using OER? If so, what is your impression of the savings they have made? If not, why?

Do you think there are hidden costs associated with the use of OER? If so, what are they?

Do you think your institution has benefitted from adopting/using OER? If so, how? If not, why not?

Has there been any financial benefits to your institution from OER use? Directly? Indirectly?

Hypothesis G: Informal learners use a variety of indicators when selecting OER (Informal learners use a variety of indicators when selecting OER)

Although this hypothesis is aimed at informal learners, asking students who are studying at an institution about their study behaviours/use of OER outside of the classroom may yield relevant information as some students also undertake additional home study/non-accredited study. Follow-on questions relating to other aspects of informal learning are available under Hypotheses H & K.

Questions for Students

Do you use OER outside of the classroom or the context of your studies (e.g. for home study or non-accredited study)?

How do you set about finding OER?

Is there a typical method you use for finding OER? Could you tell us more about how you find OER?

Do you make use of any internet tools to find OER? Which tools do you use?

How do you make judgements about the quality of OER?

Questions for Educators

How do you think students find OER?

How do you think students make judgements about the quality of OER that they find?

Do you recommend specific OER to your students?

Hypothesis H: Informal learners adopt a variety of techniques to compensate for the lack of formal support, which can be supported in open courses (Informal learners develop their own forms of study support)

These questions have been written to follow-on from those in Hypothesis G. See also Hypothesis K.

Questions for Students

General

Do you feel supported in your learning?

Can you describe to me how you study?

[The following is a modified version of the core survey question for this hypothesis]: Which of these have you used to support your learning with OER?

[Show cards with the following options]:

- Discussion with others via social networks (e.g. Facebook, Google+, MySpace)
- Discussion in online forums

- Discussion with others in person
- Discussion via microblogging (e.g. Twitter, Tumblr)
- Discussion via videochat (e.g. Skype, Google Hangout, Facebook)
- Consulting and/or editing wikis (e.g. Wikipedia)
- Writing or reading blogs
- Writing my own study notes
- Informal study groups
- Use of a learning journal/diary
- Use of additional resources such as CDs, books, video and podcasts
- Use of a study calendar/plan
- Use of digital note taking applications (e.g. Google docs/drive, Evernote, Videonotes)

Could you tell us more about why you used these? Are there any ways you supported your learning with OER which have not been mentioned? Which of these ways to support your learning with OER might you regularly use?

Additional questions re: online courses (for all interviewees)

Have you ever taken an online open course (e.g. MOOC)? Please tell us more about what course you chose and why.

What kinds of support, if any, were offered in the course?

Did/do you feel supported in your learning?

How did you support your own learning?

Questions for Educators

Some students make use of OER in informal contexts, what do you think are the pros and cons of this type of learning?

Do you think that students compensate for any lack of formal support? If so, how? If not, why not?

Hypothesis I: Open education acts as a bridge to formal education, and is complementary, not competitive, with it (Open education acts as a bridge to formal education, and is complementary, not competitive, with it)

Questions for Educators and Managers

Some people believe that OER can make a positive contribution to student motivation and encourage people to move from informal learning to formal study programmes. Is this a view that you would agree with? Why? Why not?

Can you give an example from your own experience of someone moving from an informal study situation to a formal study situation?

Did OER have a role in that transition? If so, how?

What role did the use of OER have in that transition?

Did OER make the difference?

In what ways do you think OER might help the transition from informal to formal learning?

What do you think are the key factors in helping students transition from informal to formal learning settings?

Are other factors more important? If so, what are these factors?

What lessons or implications are there for the ways in which educational institutions recruit, motivate and support students?

Do you think that open education complements formal education, or competes with it?

Hypothesis J: Participation in OER pilots and programs leads to policy change at an institutional level (OER use encourages institutions to change their policies)

Questions for Educators and Managers

Has your institution participated in any OER pilots and/or programs?

How did these pilots and programs come about?

What was the aim of the pilot/program?

What kind of impact, if any, did this project/program have on your institutional policy and/or practice?

What kinds of practices and policies, if any, does your institution have in relation to OER?

Are you aware of any changes to policy and/or practice that have taken place at your institution as a result of participation in OER pilots and/or programs?

What is the name of the OER pilot(s) and/or program(s) which led to changes in policy and/or practice at your institution? [ask interviewee for reference/future detail, if needed]

In the context of your role as a [xxxx], what kinds of policies would help you to be more open?

For interviewees who have a specific project/repository/initiative based at their institution:

Do you think that there have been any changes to your institutional policies and practices as a result of [xxxx] being based at [xxxx]?

Hypothesis K: Informal means of assessment are motivators to learning with OER (Informal assessments motivate learners using OER)

These questions have been written to follow-on from those in Hypothesis G and H.

What motivates you as a learner?

Have you ever taken a course where you had the opportunity to be awarded a badge?

Was the course where you had the opportunity to be awarded a badge open?

When you are using an OER, what helps you to learn?

[The following is a modified version of the core survey question for this hypothesis]: Which of the following features have you encountered in your use of OER or open courses? Which, if any, of these have helped motivate you to study?

[Show cards with the following options]:

- Being issued with a certificate for participating or completing the course

- Being allowed to progress to the next section if I completed an automatically graded test correctly
- Being able to work through the course with other people
- Having an educator or instructor available to provide support
- Being provided with hints or advice about how to answer a question or perform a task when I clicked on a button
- Being allowed to look back and review my progress through the course
- Being allowed to check whether I had answered a question correctly
- Being given automated feedback on submitted work
- Being allowed to talk with other learners on the course about my experiences (e.g. through forums)
- The resource being part of a series of open, online courses which contributed to a recognised qualification
- Being presented with a series of challenges to complete in order to demonstrate skills development
- Being rewarded for participation, skills or knowledge through an online “badge”
- Being required to complete tasks for which an instructor would give feedback
- Being required to complete tasks for which other students would give feedback

- The resource/course being structured to take place over a specific timeframe
- There being virtual seminars where students could interact with each other and an instructor
- Working collaboratively with other people to complete tasks

Is there any other feature of a an OER or open course that has motivated you to study?

Which of the features you've encountered do you like the most?
Do you feel that they have helped motivate you to learn?

Are you aware of 'badging'? Do you believe that badging helps to motivate learners like you? Why/Why not?

OER Research Hub Survey Question Bank

1_1 What is your age?

1. Under 15 years
2. 15 – 18 years
3. 19 – 24 years
4. 25 – 34 years
5. 35 – 44 years
6. 45 – 54 years
7. 55 – 64 years
8. 65 – 74 years
9. Over 74 years

1_2 What is your gender?

Male

Female

Transgender

1_3 Where do you live?

[add list of countries]

1_4 What is your ethnicity?

[open]

1_5 Is English your first spoken language?

1. Yes
2. No

If NO, please specify your first spoken language

1_6_1 What is your highest educational qualification?

UK categories

1. No formal qualification
2. Lower than A level
3. A level or equivalent
4. Higher education qualification
5. Postgraduate qualification
6. Vocational Qualification

Other (please specify)

1_6_2 What is your highest educational qualification?

US categories

1. High School Diploma
2. Attended College
3. Associates Degree (two-year)

4. Bachelors Degree
5. Masters Degree
6. PhD or Professional Doctorate
7. No formal qualification

Other (please specify)

1_6_3 What is your highest educational qualification?
Global categories

1. School-leaving qualification (16-18 years)
2. Vocational qualification (i.e. practical, trade-based)
3. College diploma or certificate
4. Undergraduate/Bachelors University degree
5. Postgraduate/Graduate School University degree
6. No formal qualification

Other (please specify)

1_7 What is your employment status? [Tick all that apply]

1. Full-time employed/self-employed
2. Part-time employed/self-employed
3. Full-time voluntary work
4. Part-time voluntary work
5. Full-time student
6. Part-time student
7. Unwaged and seeking employment
8. Unwaged with domestic responsibilities
9. Disabled and not able to work
10. Retired

Other (please specify)

1_8 Do you consider yourself to have a disability?

Yes

No

1_9 If you have answered YES to question <xx>, please indicate the nature of your disability (Tick all that apply)

1. Blind/partially sighted
2. Deaf/hard of hearing
3. Speech impediment
4. Mobility and dexterity impairment(s)
5. Learning difficulties/disabilities
6. Neuro-diverse impairment(s)
7. Mental health problem(s)
8. Long term illness / chronic medical condition

Other (please specify)

1_10 In which of these ways, if any, have you accessed the Internet during the past three months? (Select all that apply)

1. Via an Internet-enabled mobile phone (smartphone)
2. Via a tablet computer or iPad
3. At home using a broadband connection
4. At home using a dial-up connection
5. Via a games console
6. At work
7. At an educational institution
8. Via a community facility (e.g. a library)
9. Via a commercial facility (e.g. cyber café)

In another way (please specify)

1_11 Which of these things have you done in the last year?
(Select all that apply)

1. Sent an email
2. Written a document using word processing software (e.g. Word)
3. Used presentation software (e.g. PowerPoint)
4. Performed calculations with spreadsheet software (e.g. Excel)
5. Contributed to a wiki (e.g. Wikipedia)
6. Written a blog post (e.g. WordPress, Blogger)
7. Shared an image online (e.g. Flickr, Instagram, Pinterest)
8. Posted on a microblogging platform (e.g. Twitter, Tumblr)
9. Took part in a videochat (e.g. Skype)
10. Contributed to an Internet forum
11. Contributed to a social network (e.g. Facebook, Google+, MySpace, Beebo)
12. Used cloud-based storage (e.g. Dropbox, Google Drive)
13. Shopped online (e.g. eBay, Amazon)
14. Downloaded a podcast (e.g. iTunes)
15. Downloaded a file using a torrent client (e.g. Bittorrent, UTorrent)
16. Filmed and uploaded video content
17. Used a virtual learning environment to study or teach (e.g. Moodle, Blackboard)
18. Recorded and uploaded a podcast

Formal and informal learner-specific independent variable questions

1_12 What are your main reasons for study? [Formal learners]

1. To gain a qualification/credits for further study
2. To improve employment prospects
3. For professional development
4. For personal development
5. For leisure or enjoyment
6. In connection with voluntary work or caring responsibilities
7. To gain confidence or self-esteem
8. As a replacement for college or university education

Other (please specify)

1_13 What is the format of your studies? [Select any that apply.]

1. Full-time face-to-face study
2. Part-time face-to-face study
3. Full-time distance/online study
4. Part-time distance/online study
5. Full-time blended (face to face and distance/online) study
6. Part-time blended (face to face and distance/online) study
7. Informal (i.e. with no teacher or tutor support)

Other (please specify)

1_14 Within which educational contexts do you study? [Select one].

1. School education
2. Further Education/College

3. Higher education/University
4. Work-based education
5. Personal (one-to-one) tutoring
6. Study without a teacher

Other (please specify)

General filter questions

1_15 What are your main reasons for using the <site name> resources?

1. Personal interest
2. Family interest
3. Professional development
4. Study related to my work or business
5. In connection with my formal studies
6. For use when training others at work
7. For use when teaching in an educational institution (e.g. school, college, university, adult learning centre)
8. To find information (rather than study a complete unit)
9. For the purpose of sharing with others
10. To improve my study skills
11. To improve my non-native language skills
12. Relevant to voluntary work or caring responsibilities

Other (please specify)

Educator-specific independent variable questions

1_16 What kind of teaching do you do? (Select any that apply)

1. Full-time face to face teaching
2. Part-time face-to-face teaching
3. Full-time distance/online teaching
4. Part-time distance/online teaching
5. Full-time blended (face to face and distance/online) teaching
6. Part-time blended (face to face and distance/online) teaching
7. Work-based training

Other (please specify)

1_17 Within which educational context(s) do you work? (Select any that apply)

1. School education (K12)
2. Further Education/College
3. Higher education/University
4. Work-based training
5. Personal (one-to-one) tutoring

Other (please specify)

1_18 In which subject area(s) do you usually teach? (Tick any that apply)

1. Computing and Information Science
2. Psychology and Philosophy
3. Religious Studies
4. Social Science

5. Languages & Linguistics
6. Science
7. Mathematics
8. Arts
9. Literature
10. History & Geography
11. Economics, Business & Management
12. Applied Science, Technology, Engineering
13. Medicine
14. Health & Social Care
15. Education Studies
16. Physical Education
17. Special Education

Other (please specify)

1_19 In which subject area(s) do you usually use open educational resources? (Tick any that apply)

1. Computing and information science
2. Psychology and Philosophy
3. Religious Studies
4. Social Science
5. Languages & Linguistics
6. Science
7. Mathematics
8. Arts
9. Literature
10. History & Geography
11. Economics, Business & Management

12. Applied science, technology, engineering
13. Medicine
14. Health & Social Care
15. Education Studies
16. Physical Education
17. Special Education

Other (please specify)

1_20 For how many years have you been teaching?

1. Under 1 year
2. 1 to 3 years
3. 4 to 6 years
4. 7 to 10 years
5. Over 10 years

1_21 Which of the following activities have you done in the past year? (Tick all that apply)

1. Used Twitter or other social networking to share information
2. Maintained a personal blog or wiki
3. Presented your work at research events (e.g. conferences)
4. Presented your work at staff development events
5. Published podcasts or other audio/video online
6. Used social bookmarking or similar to share links
7. Deposited a resource into an open repository
8. Shared resources in response to requests via mailing lists or email
9. Published books or study guides with a commercial publisher

10. Published research or teaching presentations publicly online
11. Linked to online content when writing reports, papers, etc.
12. Published a paper in an academic journal

QUESTIONS FOR EACH HYPOTHESIS FOLLOW

HYPOTHESIS A: Use of OER leads to improvement in student performance and satisfaction

2_1 Based on your experience as a teacher, to what extent do you agree with the following statements?

Use of open educational resources (e.g. <OpenLearn/Connexions> content in the classroom...

[Strongly agree, agree, neither agree nor disagree, disagree, strongly disagree]

1. Increases learners' participation in class discussions
2. Increases learners' interest in the subjects taught
3. Increases learners' satisfaction with the learning experience
4. Leads to improved student grades
5. Builds learners' confidence
6. Develops learners' increased independence and self-reliance
7. Allows me to better accommodate diverse learners' needs
8. Increases learners' engagement with lesson content
9. Increases learners' experimentation with new ways of learning
10. Increases collaboration and/or peer-support amongst learners
11. Increases learners' enthusiasm for future study
12. Leads to learners becoming interested in a wider range of subjects than before they used OER

I have not used OER content in the classroom

Further comments [open-ended]

2_2 In which of these ways, if any, has your use of open educational resources made an impact on your formal studies? (Tick all that apply) [Learners]

Using open educational resources <OpenLearn content / Connexions content> has led to my...

1. Increased participation in class discussions
2. Increased interest in the subjects taught
3. Increased satisfaction with the learning experience
4. Grades improving
5. Gaining confidence
6. Having increased independence and self-reliance
7. Increased engagement with lesson content
8. Increased experimentation with new ways of learning
9. Increased collaboration with my peers
10. Increased enthusiasm for future study
11. Becoming interested in a wider range of subjects than before I used these resources
12. Being more likely to complete my course of study

Further comments [open-ended].

HYPOTHESIS B: The open aspect of OER creates different usage and adoption patterns than other online resources

TEXT: About open educational resources

Open Educational Resources are teaching, learning or research

materials that are in the public domain or released with an intellectual property license that allows for free use, adaptation, and distribution.. Open educational resources can be in many formats, including open textbooks, complete courses and small assets such as videos.

Many free online resources are open educational resources.

3_1 In which of these ways, if any, have you used or created open educational resources (OER)? [Tick all that apply]

1. I have used open educational resources
2. I have adapted open educational resources to fit my needs
3. I have created open educational resources for study or teaching
4. I have created resources myself and published them on a Creative Commons (CC) licence
5. I have added a resource to a repository
6. I have downloaded a resource from a repository
7. I have added comments to a repository regarding the quality of a resource
8. I have added comments to a repository suggesting ways of using a resource
9. I have not used or created open educational resources

Other (please specify)

[Learners]

10. I have used open educational resources in the context of my studies

11. I have taken a course comprised of open educational resources

3_2 [Educators] Which, if any, of the following types of open educational resources have you used for teaching/training? (Select all that apply)

1. Open textbooks
2. Whole course
3. Elements of a course (e.g. a module/unit)
4. Videos
5. Audio podcasts
6. Images
7. Infographics
8. Interactive games
9. Lectures
10. Lesson plans
11. Tutorials
12. Quizzes
13. E-books
14. Data sets
15. Learning tools, instruments and plugins

Other (please specify)

3_3 [Learners] Which, if any, of the following types of open educational resources have you used? (Tick all that apply)

1. Open textbooks
2. Whole course

3. Elements of a course (e.g. a module/unit)
4. Videos
5. Audio podcasts
6. Images
7. Infographics
8. Interactive games
9. Lectures
10. Lesson plans
11. Tutorials
12. Quizzes
13. E-books
14. Data sets
15. Learning tools, instruments and software plugins

Other (please specify)

3_4 [Educators] For which of the following purposes have you used educational resources in the context of your teaching/training? (Select all that apply)

1. To prepare for my teaching/training
2. To get new ideas and inspiration.
3. To supplement my existing lessons or coursework
4. As 'assets' (e.g. images or text extracts) within a classroom lesson
5. To give to learners as compulsory self-study materials
6. To give to learners as optional self-study materials
7. To provide e-learning materials to online learners.
8. To compare them with my own teaching/training materials in order to assess the quality of my materials

9. To broaden the range of my teaching methods
10. To broaden the range of resources available to my learners
11. To make my teaching more culturally diverse [or responsive]
12. To enhance my professional development
13. To stay up-to-date in a subject or topic area
14. To learn about a new topic
15. To engage my students more fully in a topic area
16. To connect with teachers or learners who have similar interests (e.g. by reading comments they have posted about resources)
17. To interest hard-to-engage learners

Other (please specify).

3_5 [Learners] For what purposes have you used open educational resources? (Tick all that apply)

1. Personal development
2. Leisure or enjoyment
3. Study connected with employment
4. Training others at work
5. Teaching in an educational institution (e.g. school, college, university, adult learning centre)
6. To find information (rather than study a complete unit)
7. To supplement my higher education study
8. To supplement my college study
9. To supplement other types of formal study
10. To improve my study skills
11. To improve my non-native language skills
12. In connection with a business

Other (please specify):

3_6 [Learners] Which, if any, of the following factors influenced your decision to use open educational resources <or give repository name, e.g. Connexions>? (Tick all that apply)

1. The opportunity to study at reduced or no cost
2. The chance to try university-level content before signing up for a paid-for course
3. The materials can be used flexibly
4. The materials can be accessed at any time
5. The materials can be studied online
6. A desire to have a learning experience/study a course
7. A need to find information (but not to study a course)

Another factor (please specify)

3_7 [Learners & educators]. In which ways, if any, do you share information about the open educational resources that you find? (Select all that apply)

1. Via email
2. Via a mailing list
3. Via a social network (e.g. Facebook, Google+, MySpace, Beebo)
4. Via blogging (e.g. WordPress, Blogger)
5. Via a video tube site (e.g. YouTube, Daily Motion, Vimeo)
6. Via an internet forum
7. Published on a personal website
8. Via microblogging (e.g. Twitter, Tumblr)
9. Via curation services (e.g. Scoopit)
10. Via image sharing services (e.g. Flickr, Instagram, Pinterest)

11. Via cloud-based storage (e.g. Dropbox, Google Drive)
12. Via podcast
13. Via virtual learning environment (VLE) (e.g. Moodle, Blackboard) or intranet
14. In person
15. I don't share information about open educational resources

Other sharing method (please specify)

3_8 [Educators & Learners] Which OER repositories or educational sites have you used?

1. iTunes/iTunesU
2. YouTube/YouTubeEdu/YouTubeSchool
3. TED talks/TED-Ed
4. Merlot
5. OpenLearn
6. Khan Academy
7. Jorum
8. Curriki
9. Connexions
10. CK-12
11. Wikibooks
12. MIT Open Courseware
13. Creative Commons
14. Saylor Foundation
15. Massively Open Online Courses (MOOC) (e.g. FutureLearn, MITx, Coursera, etc.)
16. I have not used any of these sites

Other (please specify)

3_9 [Educators & learners] What difference, if any, has your use of open educational resources made to your sharing practices? [Open]

3_10 [Educators & learners] In which subject area(s) do you usually create or use learning resources? (Select all that apply)

1. Computing and information science
2. Psychology and Philosophy
3. Religious Studies
4. Social Science
5. Languages & Linguistics
6. Science
7. Mathematics
8. Arts
9. Literature
10. History & Geography
11. Economics, Business & Management
12. Applied science, technology, engineering
13. Medicine
14. Health & Social Care
15. Education Studies
16. Physical Education
17. Special Education

Other (please specify)

3_11 [Formal learners] In which subject area(s) are you studying and in which subject area(s) do you usually use learning resources?

[I am studying in this subject area / I use open educational resources in this subject area]

1. Computing and information science
2. Psychology and Philosophy
3. Religious Studies
4. Social Science
5. Languages & Linguistics
6. Science
7. Mathematics
8. Arts
9. Literature
10. History & Geography
11. Economics, Business & Management
12. Applied science, technology, engineering
13. Medicine
14. Health & Social Care
15. Education Studies
16. Physical Education
17. Special Education

Other (please specify)

3_12 [Educators] Which challenges, if any, do you most often face in using open educational resources? (Select all that apply)

1. Overcoming technology problems when downloading resources
2. Knowing where to find resources
3. Finding suitable resources in my subject area

4. Finding resources of sufficiently high quality
5. Finding resources that are up-to-date
6. Finding resources that are relevant to my local context
7. Getting work colleagues/managers to accept the use of open educational resources
8. Not being skilled enough to edit resources to suit my own context
9. Not knowing whether I have permission to use, change or modify resources
10. Not having enough time to look for suitable resources
11. Not having connections with open educational resource-using peers who could be a source of support
12. Missing/needing the support of a tutor or teacher to help me work through open course materials
13. Not knowing how to use the resources in the classroom
14. Not having enough time/opportunities to experiment with using open educational resources in the classroom
15. Lacking institutional support for my use of open educational resources
16. Resources not being aligned with professional standards or regulation
17. Alignment with recognition and/or certification

Other (please specify)

IMAGE: Creative Commons logo

<http://mirrors.creativecommons.org/presskit/icons/cc.large.png>

"A license is a document that specifies what can and cannot be

done with a work (whether sound, text, image or multimedia). It grants permissions and states restrictions. Broadly speaking, an open license is one which grants permission to access, re-use and redistribute a work with few or no restrictions." Open Definition <http://opendefinition.org/guide/>

3_13 [Educators & learners] What do you know about this logo?

1. I've never seen it
2. I've seen it but I don't know what it means
3. I've seen it and I know what it means

3_14 [Educators] How important is open licensing to you when using resources in your teaching? [5 point L-Scale Very important...Not at all important]

Further comments

3_15 [Learners] How important is open licensing to you when using open educational resources? [5 point L-scale Very important...Not at all important]

Further comments

HYPOTHESIS C: Open education models lead to more equitable access to education, serving a broader base of learners than traditional education

The survey should be able to provide data through a combination of demographics information and the responses to questions for hypotheses A and B. No specific questions for this hypothesis.

HYPOTHESIS D: Use of OER is an effective method for improving retention for at-risk students

NOTES: This hypothesis will perhaps be best answered through (1) Comparison of demographic information with general figures/national averages; (2) Using metrics for identifying typically at-risk students from the demographic information. (3) Case study qualitative research based around interviews. (4) Institution-provided retention figures.

Note – this question need not stand alone but can be added to the hypothesis A matrix.

[Educators] To what extent do you agree with the following statement:

4_1 Using open educational resources increases the likelihood of at-risk students continuing with their studies (strongly agree, agree, neither agree nor disagree, disagree, strongly disagree)[ac]

Further comments

4_2 [Educators] In your experience, do any of the following aspects of open educational resources help improve retention for students who are at risk of dropping out of their course of study? (Select all that apply)

1. Reduced cost of study materials
2. Greater range of learning methods
3. Materials can be used flexibly
4. Materials can be accessed at any time
5. Materials can be adapted to suit student needs
6. Use of resources for improving study skills

7. Materials can be used for improving non-native language skills
8. Materials are available in different languages
9. Availability of culturally-relevant materials

Other (please specify)

HYPOTHESIS E: Use of OER leads to critical reflection by educators, with evidence of improvement in their practice

5_1 [Educators] To what extent do you agree with the following statements about the impact on your teaching practice of your using open educational resources? [strongly agree, agree, neither agree nor disagree, disagree, strongly disagree]

1. I have broadened my coverage of the curriculum
2. I use a broader range of teaching and learning methods
3. I have improved ICT skills
4. I make use of a wider range of multimedia
5. I make more use of culturally diverse resources
6. I have a more up-to-date knowledge of my subject area
7. I reflect more on the way that I teach
8. I more frequently compare my own teaching with others
9. I now use OER study to develop my teaching
10. I collaborate more with colleagues
11. Further comments about the impact on your teaching of using open educational resources

HYPOTHESIS F: OER adoption at an institutional level leads to financial benefits for students and/or institutions

6_1 [Learners] Have you saved money by using open educational resources?

1. Yes
2. No
3. Don't Know

Further comments

6_2 [Educators] Do you believe that your students have saved money by using open educational resources?

1. Yes
2. No
3. Don't Know

Further comments

6_3 [Educators and learners] Do you think that your institution benefits financially by using OER?

1. Yes
2. No
3. Don't Know

Further comments

HYPOTHESIS G: Informal learners use a variety of indicators when selecting OER

7_1 [Educators & learners] Which of the following factors would make you more likely to select a particular resource when searching for open educational content?

1. Evidence of interest in that resource (e.g. lots of downloads)
2. The resource being recently created, uploaded or updated
3. The resource being easy to download
4. A description of learning objectives or outcomes being provided
5. The resource being created/uploaded by a reputable/trusted institution or person
6. The resource having a Creative Commons license
7. The resource having an open license allowing adaptation
8. The length/complexity of the resource
9. Use of interactive or multimedia content (e.g. video or quiz) in the resource
10. Positive user ratings or comments about the resource
11. Personal recommendation
12. Having previously used this resource successfully
13. The resource being relevant to my particular interests/needs
14. The resource featuring a catchy title or attractive image(s)
15. Being required to use a resource for a project or study task
16. The resource having previously been used with students
[teacher only question]
17. A detailed description of the resource content being provided

Other (please specify)/Further comments

HYPOTHESIS H: Informal learners adopt a variety of techniques to compensate for the lack of formal support, which can be supported in open courses

TEXT: Informal learning is the activity of understanding, gaining knowledge or acquiring skills that occurs outside of formal educational institutions. This kind of learning typically occurs without teacher/tutor support.

8_1 [All learners] Which, if any, of these techniques have you used to support your learning with open educational resources? [Tick all that apply]

1. Discussion with others via social networks (e.g. Facebook, Google+, MySpace)
2. Discussion in online forums
3. Discussion with others in person
4. Discussion via microblogging (e.g. Twitter, Tumblr)
5. Discussion via videochat (e.g. Skype, Google Hangout, Facebook)
6. Consulting and/or editing wikis (e.g. Wikipedia)
7. Writing or reading blogs
8. Writing my own study notes
9. Informal study groups
10. Use of a learning journal/diary
11. Use of additional resources such as CDs, books, video and podcasts
12. Use of a study calendar/plan

Other learning support technique (please specify)

HYPOTHESIS I: Open education acts as a bridge to formal education, and is complementary, not competitive, with it

9_1 [Informal learners] As a result of using <specify repository>, are you more or less likely to do any of the following? [More likely – no change – less likely – don't know]

1. Study a free course / study a free open educational resource
2. Enrol on a paid-for course
3. Enrol on a paid-for course and work towards a qualification
4. Do further research in the subject you are interested in
5. Download more materials from <specify repository>
6. Make use of <specify source e.g. OpenLearn> materials for teaching
7. Share <specify source e.g. OpenLearn> materials with others
8. Recommend <specify source e.g. OpenLearn> free content to others

Further comments

9_2 [Formal learners] As a student, did you study your subject via open educational resources before joining your course?

1. Yes
2. No
3. Not sure

Further comments

9_3 [Formal learners] Did your use of open educational

resources influence your decision to register for your current course of study?

1. Yes
2. No
3. Not sure

Further comments

HYPOTHESIS J: Participation in OER pilots and programs leads to policy change at institutional level

10_1 [Educators] Does your institution have a policy with respect to using or creating open educational resources?

1. Yes
2. No
3. Don't know

Further comments

HYPOTHESIS K: Informal means of assessment are motivators to learning with OER

11_1 [Learners & educators.] In your use of open educational resources, which of the following features have you encountered?

1. Being issued with a certificate for participating or completing the course

2. Being allowed to progress to the next section if I completed an automatically graded test correctly
3. Being able to work through the course with other people
4. Having an educator or instructor available to provide support
5. Being provided with hints or advice about how to answer a question or perform a task when I clicked on a button
6. Being allowed to look back and review my progress through the course
7. Being allowed to check whether I had answered a question correctly
8. Being given automated feedback on submitted work
9. Being allowed to talk with other learners on the course about my experiences (e.g. through forums)
10. The resource being part of a series of open, online courses which contributed to a recognised qualification
11. Being presented with a series of challenges to complete in order to demonstrate skills development
12. Being rewarded for participation, skills or knowledge through an online “badge”
13. Being required to complete tasks for which an instructor would give feedback
14. Being required to complete tasks for which other students would give feedback
15. The resource/course being structured to take place over a specific timeframe
16. There being virtual seminars where students could interact with each other and an instructor
17. Working collaboratively with other people to complete tasks

Further comments

11_2 [Learners & educators.] In your use of open educational resources, which of the following features have motivated you to study?

1. Being issued with a certificate for participating or completing the course
2. Being allowed to progress to the next section if I completed an automatically graded test correctly
3. Being able to work through the course with other people
4. Having an educator or instructor available to provide support
5. Being provided with hints or advice about how to answer a question or perform a task when I clicked on a button
6. Being allowed to look back and review my progress through the course
7. Being allowed to check whether I had answered a question correctly
8. Being given automated feedback on submitted work
9. Being allowed to talk with other learners on the course about my experiences (e.g. through forums)
10. The resource being part of a series of open, online courses which contributed to a recognised qualification
11. Being presented with a series of challenges to complete in order to demonstrate skills development
12. Being rewarded for participation, skills or knowledge through an online “badge”
13. Being required to complete tasks for which an instructor would give feedback

14. Being required to complete tasks for which other students would give feedback
15. The resource/course being structured to take place over a specific timeframe
16. There being virtual seminars where students could interact with each other and an instructor
17. Working collaboratively with other people to complete tasks

Further comments