OCW-EU
The consortium partners in OCW-EU consider open education to be an essential component of the development of virtual mobility. It enables students to follow a program away from their home campus and/or better prepare themselves before studying abroad. It increases transparency by showing what HEI have to offer which may assist students in their selection of the right foreign institute. It is also a valuable tool to facilitate and enhance cooperation between institutes. For Lifelong Learners open education provides access to state of the art education and high quality courses for their continuing development. It is flexible and therefore easier to combine with professional activities than traditional Lifelong Learning programs.

The main objective of the project is to support virtual mobility on the basis of OpenCourseWare. On top of that, an European OCW network will improve conditions for Lifelong Learners, who are an important user group of OCW. Policies play an important role in facilitating use, production and uptake of OER and maximizing it's potential. Therefore we have included Open Policy as an integral part of the OCW-EU project.

Open Policies
In order for OCW to be integrated into educational practice, policies must be in place that encourages its production and use. Development of these policies at the national and institutional levels can build upon existing policies of open sharing, open access, lifelong learning and student mobility. We have compared and assessed European policies that we have gathered in an overview of European policies and a Case study library with best practices on various aspects of Open Policies, spread over different policy levels (Institutional/National/Supranational). This forms the basis for our Open Policy Guidelines.

Open Policy Guidelines
The purpose of these guidelines is to provide an overview of the 'decision points' that need to be taken into account when developing, implementing or improving Open Policy at (HE) institutions. Depending on your role in your institution, the current state of your open initiative, and your goals, you might use this set of guidelines differently. The guidelines, with references to the case studies and additional open materials on Open Policies, can be found under http://opencourseware.eu/reports/open-policy-guidelines.

OCWC GLOBAL
conference
Ljubljana Slovenia
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OCW CONSORTIUM
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FASE	MAIN QUESTIONS	EXTRA STEPS / CONSIDERATIONS	ADDITIONAL INFO / REFERENCES	ANSWERS
	1. Where are we? Defining your starting point Exploring Options.	OER as a means to what ends? Why do we want an open policy?	• Understanding OER (OER Africa) • OER Africa Policy Toolkit • The benefits of open, by Arno Smets (Delft University of Technology).	
ORIENTATION / PREPARATION	**2. Goal: What do you want?** To what end does your institution want to employ OER and how?	Possible approaches in orientation phase: • Strategic sessions • Chances vs threats • Defining goals	• SURF, Strategic workshops open education: lessons learned • Case Study: Open University NL	
		"Before you even begin to assemble the specific cases you will make for an Open Education project at your institution, take some time to think about your institution's individual character."	• The OCW Consortium Toolkit lists a number of relevant questions you might ask yourself.	
		Define the goals of your institution for implementing OER e.g.: • Social mission • Knowledge sharing • Peer review	• Case study: Open University - UK	
		• Define motives • Define stakeholders • Create support from multiple organisation layers	• Jacobi, R. (2012). Open Educational Resources in the Netherlands: Whither and Why? (in Trend Report: Open Educational Resources 2012, p 54)	
		How to deploy OER? • Produce • Use • Re-use/remix • Other...	• OER Asia: Workflow scenarios for digitization and distribution	
FORMULATING POLICY	**3. Why open policy?** Do you need an open Policy? Will 'fixing' your goals in a policy help you further you in reaching them?	• What is the objective of this policy? • Why is it necessary? • What will it accomplish? • What other policies will influence or be influenced by this policy?	• Examples of institutional OER policies (OER Africa) • Case study: Open University - UK • Policy Changes (OER Africa)	

	4. What type of policy?
	
	Consider what type of policy is suitable, viable and attainable in your situation..
		Character:
		• Stimulating/motivating
		  ○ Facilitating
		  ○ Pragmatic
		• Licensing & legislation
			• Case study: OER University
			• IPR & Copyright (OER Africa)
			• OER Policy Registry (Creative Commons)
			• OCW-EU - European Policies	

		Type:
		• Binding - not binding
		• Formal - non formal
		
		• Policy vs. Practice?
			• Case Study: Universitat de Barcelona
			• Case study: Universia
			• Declarations:
			  ○ Paris Declaration
			  ○ Open Scotland
			• OER Research hub on Policy change	

FASE	MAIN QUESTIONS	EXTRA STEPS / CONSIDERATIONS	ADDITIONAL INFO / REFERENCES	ANSWERS
FORMULATING POLICY	**5. How to realize?**	Get the policy approved ''Review draft policy for accuracy, brevity and completeness. Ascertain who should approve it before taking further action and the level of authority required for the final recommendation'' (OER Africa).	• Case Study: KU Leuven • Case study: Creative Commons Poland	
		Fit with existing policies • For ease of implementation: How does your policy fit within existing Open policies? • Ensuring sustainability	• Case Study: Vetagro Lyon • OER Asia on Sustainability	
		Fit with adjacent types of policy When developing an open policy, adjacent policies/policy issues need to be reviewed, like: • Intellectual Property Rights • HR: Human resource policy guidelines • ICT • Materials development and quality assurance	• OER Africa Toolkit argues that particularly policy on IPR and Copyrights are important to enable roll out of an Open policy. • Case Study: Universidad Politecnica Madrid	
		Relation with other types of online education. There can be synergy between OER and ODL. For effective policy operationalization, the relationship between OER and other Open/Online Education initiatives needs to be considered	• OER Africa Toolkit • OER Asia: OER in the context of ODL	
		Create business model Develop & integrate OER in business strategy and model.	• Schuwer, R. & Janssen, B. (2013). Trends in business models for open educational resources and open education (in Trend report Open Educational Resources 2013)	
IMPLEMENTATION & OPERATIONALISATION	**6. How to implement?**	''Time the release and manner of release and ensure that every affected party is aware of and has access to the approved policy document. Ascertain the 'ground rules' for the day-to-day administration of the policy, i.e. develop a related set of policy procedures.'' ''Designate responsibility, accountability and authority for putting the policy into effect and clarifying administrative controls.'' Source: OER Africa	• OCW Consortium Toolkit • OER Africa	
		Develop policy • Define your approach: top down and bottom up • Take into account teachers perspective • Start with early adopters • Start experimenting • Develop a vision • Define priorities • Appoint appropriate funds/free resources • Take into account cultural change & 'the human factor' (i.e. resistance to change).	• OER Toolkit (OER Africa) • Case Study: Universidad Politecnica Madrid • Rubens, W. & Diddere, W. (2013). The Human factor in the adoption of Open Educational Resources: what determines readiness to share. in Trend Report 2013: Open Educational Resources 2013	

FASE	MAIN QUESTIONS	EXTRA STEPS / CONSIDERATIONS	ADDITIONAL INFO / REFERENCES	ANSWERS
IMPLEMENTATION & OPERATIONALISATION	6. How to implement?	Experiment: • Start small • Important: effective internal communication • Include stakeholders • Incorporate open education in core business university	• Case study: OER University	
		Critical aspects: • Enthusiastic people • Support from management • Financial aspects • Scalability • Professionalizing staff • Facilitation	• OCW Consortium: Creating a team • Case Study: Universidad Politecnica Madrid	
		• What elements to include? • Business strategy • Business model & costs • Adjusting procedures to meet policy	• Case study: Universia	
		Policy areas • Identify target audience • Type of delivery system • Choosing the appropriate technology for *distribution* and *materials* and for *interaction* with students • Program development, course design and materials production	• OER Africa adapted a framework from Lentell (2004) and Welch & Reed (2005) to provide insight into the possible linkage between OER and Online Distance Learning. This framework holds some key policy areas that need to be taken into account when formulating an open policy.	
EVALUATION	7. How to evaluate?	• Progress & Tracking: Indicators for measuring progress • Criteria by which to measure attainment of goals	• Case study: Open University - UK	
		• Incorporated in institutions core? • Sustainable business model • Structural funding	• Jacobi, R. (2012). Open Educational Resources in the Netherlands: Whither and Why? (in Trend Report: Open Educational Resources 2012 (pdf)	