

A How-to Guide for Vendor Participation in Open Education

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Context

The CARE Framework <https://careframework.org/> identifies a set of practices that serve to demonstrate duty and care of the broader OER movement including:

1. **Contribute:** OER stewards actively contribute to efforts, whether financially or via in-kind contributions, to advance the awareness, improvement, and distribution of OER; and
2. **Attribute:** OER stewards practice conspicuous attribution, ensuring that all who create or remix OER are properly and clearly credited for their contributions; and
3. **Release:** OER stewards ensure OER can be released and used beyond the course and platform in which it was created or delivered; and
4. **Empower:** OER stewards are inclusive and strive to meet the diverse needs of all learners, including by supporting the participation of new and non-traditional voices in OER creation and adoption.

While useful these practices do not go far enough in ensuring market involvement with open education is done in ways that don't exploit and unfairly capitalize on the generosity of others. CARE Framework practices are necessary but not sufficient to prevent open washing and co-opting of open education for commercial gain.

How-to Guide for Vendor Participation in Open Education

This How-to Guide for Vendor Participation in Open Education builds on top of the CARE Framework by defining a set of behaviours, and their underlying principles, that guide market vendors in how best to participate and engage in the open education movement. The Guide also provides the open education movement with a means for assessing vendor understanding and commitment to the open movement.

In writing this How-To Guide I took the perspective of a reverse venture capitalist. What if the end game wasn't to make a ton of money quick and sell the company for maximum profit? What if the end game was aligned to the visions and goals of the open

education community? As such what I've produced is very much from the open community perspective rather than the market perspective. Some will even say it is harsh on vendors. I acknowledge it is aspirational but do not apologize for representing the views of the open community. Vendors views are already well represented and need no further championing. Vendor goals around maximizing profit, while sensible from a market perspective, are philosophically at odds with the goals of the open community. This How-To guide aims to show how the two sides can be brought closer together in alignment. Hope this is useful. *Paul Stacey*

How-to Guide for Vendor Participation in Open Education A guide for vendors on how best to participate and engage in the open education movement. A guide for the community on how to assess a vendor's understanding and commitment to the open education movement.				
Behaviour	Scale			
	Negative	Minimal	Invested (Skin in Game)	Optimal (Fully engaged, active participation in open community)
Recognize others	No attribution Exploitive Appropriation	Attribution Acknowledges and gives attribution to original creators.	Attribution Plus Acknowledges and gives attribution to original creators. Invests in original creators so they can enhance those resources..	Co-creation Acknowledges and gives attribution to original creators Actively participates in co-creating with original creators ever improving resources.
Give gratitude	No gratitude	Reputational gratitude only	Pays / rewards creators in monetary or non-monetary ways.	Invests % of revenue in helping creators achieve their goals and evergreening commons resources.

Be findable, downloadable	Resources cannot be found through general search online. Resources can be found but are not downloadable.	Resources are findable and downloadable But downloadable version is stripped of real use context	Resources are findable and downloadable via associated metadata In their full real use context	Resources are findable and downloadable linked to standards, target audience, and impact outcomes. In their full real use context Provides upload for new version submissions.
Provide free and open access	Access not free or open Requires payment to access Requires personal data to access Uses paywalls, passwords, digital locks	Access is free and open But in closed and proprietary formats that prevent use, copying, distribution, modification or improvement. But in time bombed format where free and open access is time limited.	Access is free and open And in open formats that allow modification, editing, and improvement. Reuse and remix is possible - and encouraged.	Access is free and open And in open formats that allow modification, editing, and improvement. And has a community of people (including participants from vendor) actively remixing, localizing, improving and sharing back iterative versions to the commons.
Use open licenses	No open license everything copyright protected all rights reserved	CC BY-NC CC BY-ND CC BY-NC-ND	CC BY Permissive license that maximizes potential for innovation but also creates possibility for exploitation.	PD CC 0 CC BY-SA Ensures all changes and improvements to an asset are shared back

				for mutual benefit of all. Exemplifies the behaviour that ensures sustainability.
Create value	All take, no give No value add	Some giving but not as much as taking Some value add but not as much as initial asset. Builds support resources around core asset. But does not share support resources as commons resource. No investment in core asset. No increase in value of core commons resources	Gives as much as takes Value add equals that of starting asset value. Invests in core commons assets as well as value add resources through expertise or other means. Adds value to commons resource. Value is potential and realized.	Gives more than takes. Value add to commons exceeds value of initial asset. Works collaboratively with community of co-creators to coordinate resource enhancement in mutually beneficial ways. Actively part of commons social system Value is fully realized not potential
Be transparent	No transparency about what taking or using from commons	Transparency about what taking and using of others but no transparency or	Transparency about what taking and using of others and transparency about the	Transparency about what taking and using of others and transparency about all

		completely proprietary own work	commons based portions of own work.	portions of own work with invitation and means for community input.
Have a social mission	Maximize profit.	Profit but treat others fairly.	Non-profit Social enterprise	Common good
	100% market based.	80% market based 20% social enterprise	50% market 50% social enterprise	100% commons
Engage in relationship and community building	No engagement	Engagement in the form of providing community professional development services to ensure effective use of resources	Engagement in the form of collaborating with community around enhancements to resources and services on ongoing basis	Engagement in the form of organized discipline hubs providing R&D like input and actively co-creating resources and services together in a managed way.
	Community is simply seen as customers	Community still seen as just a customer	Community seen as collaborator	
No openwashing	Branding, communication, marketing and advertising promote product or service as being open but are not.	Branding, communication, marketing and advertising mention open but don't over hype what is actually being provided	Branding, communication, marketing and advertising refer to open specific to how vendor adds value to open community	Branding, communication, marketing and advertising refer to open in ways that highlight open operational processes, and open engagement with community, not just open resources
	Deceptive misleading use of open.			
Develop trust	No trust	Participates in open	Trusted member of	Trusted leader

	Centralizes control to itself.	community but cautious trust. Participation in community but control maintained centrally.	community. Distributes considerable control to community	Shares control with the community.
Give users control of their data	User data used without or with minimal / hidden consent.	User owns data but is required to agree to give rights to use of their data to use product or service.	User owns data and can access product or service without having to accede rights.	User has means to use own data for self benefit and for benefit of others.
Open data	All data considered proprietary.	Anonymized data made open	Anonymized data made open User has ability to make their own personal data open. Vendor commits to make data open.	User and vendor contribute open data to commons for specific purposes that benefit themselves and others.
Leverage digital economics and abundance	Deliberately hobbles ability to replicate, modify and distribute digital goods.	Leverages digital economics of faster processing, greater storage, and more bandwidth. Allows for digital abundance but economic benefits of digital (no unit cost, no	Allows for digital abundance and economic benefits of digital are shared by vendor and community	Maximizes abundance and has an intentional strategy around engagement, benefits, and value creation globally

		warehouses, diverse channels to market, no geographic boundaries, ...) go to vendor		
Use open all along the value chain	No use of open. Closed proprietary system	Uses open in one part of value chain	Uses open in multiple parts of value chain generating synergistic benefits. Engages open community in multiple parts of value chain.	Uses open to do things not possible any other way Open is transformative innovation.
Defend the Commons	Sees world in market and state terms only. Commons is simply a commodity to exploit for profit	Understands there is a commons and engages with it using commons norms.	Helps defend the commons based resources of others	Defends and contributes own resources to the commons
ROI	Short term profit Not long term sustainable due to community alienation and perception of exploitation	Short to medium turn revenue generation Acceptance by community as trying ROI vendor centric	Long term sustainability through growth in value and revenue. Acceptance by community as active member ROI shared between vendor and commons community.	Long term sustainability through evergreen resources and community participation in innovation. ROI sustains vendor but is greater for commons community.

Possible add-ons and next steps:

- Acknowledge the open community viewpoint of this matrix
- Develop a glossary - open washing, commons, and other terms in this matrix are not terms that everyone will be familiar with. A glossary would help ensure meaning is understood. Words could have dual interpretation depending on vendor vs. community perspective.
- Identify actual vendor examples that correspond to each behaviour and link to them to the corresponding cell in the matrix.
- Identify a middle ground and show how to create a feel good in the middle option
- Provide a means for vendors to show progress and advancement along the scale
- Develop real example stories that illustrate optimal
- Invite vendor response to fear of optimal
- Each step of the scale could have a numerical value and a vendor score could be generated. Would be fun to get vendors to score themselves and then compare it with score generated by members of the open community.
- This matrix does not identify actual business models - charging a user fee, content for free / support services for a fee, etc. However, it may be possible to add them in the context of this matrix
- Share this matrix with the open community for feedback and suggestions
- Share this matrix with vendors for feedback and suggestions

I've had feedback from a few others too and am now considering:

- how to weave my prior Made With CC work into this I've had some feedback that that work is more important to reference than the CARE Framework
- whether this How To actually applies to all organizations - institutions, non-profits, for profits, etc. and not just vendors
- how size and funding affects an organization's ability to move along the continuum along with what is in their control and what isn't
- how to shape this in a way that doesn't create a feeling of blaming/shaming, or sorting/ranking, or classifying as insiders/outsideers
- how to make this something that supports trajectories toward openness and collaboration
- how to acknowledge all orgs make tradeoffs on this How-To and it would be valuable to identify a middle ground and show how to create a feel good in the middle option