



**The Opportunity in OER: A Short Course For Publishers
With Carrie O'Donnell, CafeLearn.com**

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KENNEALLY: OER, open educational resources are found today in many K-12 and higher ed classrooms. Free and accessible, OER materials have grown in quantity and quality. Instructors prize the flexibility of OER, and students love the affordability. Publishers, too, we think, can find a lot to like in OER, and you'll hear about that from our special guest today, Carrie O'Donnell, the founder of O'Donnell Learn and cafelearn.com, someone who's been a thought leader in educational publishing for more than 25 years.

This program is being presented to you today by Copyright Clearance Center, and our UK-based subsidiary, Ixxus. Copyright Clearance Center is a global leader in content management, licensing, discovery, and document delivery solutions through our relationships with those who use great content. Copyright Clearance Center drives market-based solutions that fuel research, power publishing, and respect copyright. Ixxus is a leading provider of global information solutions that reinvent the way organizations deliver value from data and content to drive growth. Our Ixxus publishing platform is a fully hosted cloud-based solution built upon the Alfresco content services platform. It gives you the tools you need to search, discover, surface, and reuse content, as well as across the entire content lifecycle.

Right now, though, I do want to turn to my guest who's with me today in our corporate headquarters in Danvers, Massachusetts. Carrie O'Donnell, welcome.

O'DONNELL: Thanks, Chris, I'm happy to be here today.

KENNEALLY: We're very glad you could join us. We want to tell people a bit about Carrie. For over 20 years Carrie O'Donnell has been a change agent in the education industry, particularly focusing on digital learning solutions for both the workplace and higher education. She is the founder, today, of a company called Café Learn, online at cafelearn.com, founded in January of 2013 and based in Connecticut. Briefly, Café Learn partners with firms and schools to improve learning by delivering bite-size social and measurable learning experiences.

This is not the first company Carrie has founded. You're a serial entrepreneur, which is quite a distinction because in 1990 through to 2012, you were the founder of CEO of O'Donnell Learn, which was providing solutions for educational providers to transform their products and processes in a turbulent industry with rapidly shifting business models. Rapidly shifting business models, turbulent industry – you're describing education, but you're describing publishing, too, I think, Carrie.



O'DONNELL: Primarily.

KENNEALLY: Exactly. Well, let's talk about what OER is, because we may think we know what that abbreviation means, open education resources, but you've got a very succinct definition that you want to give to us. Tell us about that.

O'DONNELL: This is the official definition from the William and Flora Hewlett Foundation, who are very big funders of open education resources. But basically open education resources are resources that are free and available for use, for adaptation, and redistribution with limited or no restrictions. These can include courses, so MOOCs are open education resources. I think you probably all know MOOCs – massive online open courses. Other kinds of course materials; there are lots of open textbooks, modules for textbooks, chapters, streaming videos, tests, software, lesson plans, and any other tools or resources or techniques to support access to knowledge. But the open education OER movement is really about access to high quality education, and it includes open content and open pedagogy. It's all about reducing costs, and aspirationally it's about improving quality, but it's not there yet.

OER today lives in a textbook environment. The reality is that most OER today still looks like traditional textbooks. There is a growing role of disaggregated content, and I have anticipated this for a number of years, which is one of the reasons I started Café Learn. We started it to make it easy for instructors and publishers to crowdsource both open and commercial content in a disaggregated way. We thought that was coming fast. It hasn't come as fast, but if you look at the use of OER, people are using a lot of little disaggregated content to bring new perspectives into class. You look at business courses, and they're using TED Talks. You look at videos and animations for science courses, DNA, short-form bring something alive, and when we show some of the other statistics further on, you'll see that.

There's also an emergence of curated OER offerings that are a mix of commercial and open. A lot of publishers and content companies are basically wrapping services, such as their technology platforms, their instructional design services, supplemental materials like assessments as a service around open content to create new, lower priced affordable offerings.

KENNEALLY: Carrie, if I can ask you, I'm curious about why, even in this very dynamic and very technology-driven environment, people are sticking with the text, predominantly – the text book. Is that on the classroom side of things or the publisher side of things, or both, would you say?

O'DONNELL: I would say both. But I would also say it really resonates from the fact that a lot of teachers are uncomfortable with change. You see that in other areas of adoption of technology in classrooms.



KENNEALLY: Very interesting, thanks for that. Let's look further at what's driving the shift to OER because I guess, Carrie, people do recognize that we are in a time when the move to open, all sorts of open – open science, open access, and the rest – really is driving a lot of what goes on publishing today.

O'DONNELL: Yeah. To me, what's driving OER is a three-legged stool of affordability, flexibility, and time, and we're going to come back to that in a few minutes. But basically OER started out as a movement, and it started with a few academics and institutions who were enamored with the idea of democratizing education and making it open. David Wiley at Brigham Young University was obviously a very big pioneer of this. He pioneered the concept of open education. Steven Downs in Canada at the National Research Council in Canada created the first MOOC. Both of them were very innovative in trying to bring open education to the world.

Then MIT open courseware was the first real concerted effort by an institution – I think I've got my history right – but that opened the movement for OER. But that movement was all about completely, 100% open. A lot of the states and institutions and people in the industry, and users and teachers and students are really more about affordability than 100% open.

So nowadays the states have really pushed open in a lot of ways. Twenty-eight states and three Canadian provinces have funded policies and projects around using open education resources. A lot of it is inducing teachers to adopt open with grants, particularly in higher ed. Some of the states that lead it are California, Washington, Minnesota. New York, with their Excelsior University has also open resources, and British Columbia.

I would just say that OER is not yet national, but it's headed in that direction and it's becoming more and more mainstream for teachers at all levels to want to adopt it in various ways.

KENNEALLY: It's understandable why people are careful, this is education, after all, you want to get things right. It's going to have an impact on generations to come, so a little bit of caution is always a good thing. A good thing for publishers to understand, too, is how this content is being used.

O'DONNELL: Yeah. By the way, the source for this is OER Research Hub. The very interesting difference between K-12 and higher ed use of OER is that in K-12, it's used primarily for professional development – or more for professional development than to supplement the course. So if you look at it, 81% to get new ideas, 71% to prepare for my teaching, 58% to broaden my range of teaching methods. If you look at most of the OER out there, it's either multimedia to show in class, and that's disaggregated multimedia video and images, or a lot of it is lesson plans and activities and quizzes and things to do in class that you can bring in.



KENNEALLY: For those teachers, then, they're really kind of crowd-sourcing, if you can put it that way. Would that be a good way to describe it? They're working with the community of other teachers who are sharing materials online.

O'DONNELL: Yeah, exactly. And you're going to see that the whole need for – a big driver of OER is media and images and videos in both higher ed and K-12.

KENNEALLY: But for me, it's interesting, just the idea of the community that's meeting there on the web and sharing materials in ways that they just couldn't have in the past. In K-12, there are two classes, so to speak, of OER. There's whole course OER and individual resources. One is a kind of macro content, the other more micro content. Here's where Common Core does come into the discussion.

O'DONNELL: The whole course OER really tends to be around Common Core subjects. So you see a lot of math and English language arts in the whole course OER offerings, and I'll show you in the next slide will be some of the key players in both. But then there's a whole other movement on individual resources that are stringing together micro content and aligning them to standards, and then organizing them as a whole course. There can be gaps, but a lot of it's algorithmically curated in the individual resources with no context or social faculty curation, so it's not as crowdsourced. But in the whole course stuff, there's a lot of frustration for the non-Common Core states because this is really around Common Core.

There's one other really big class of OER that's very interesting to me, that's in K-12 but not in higher ed, yet, and that's, as you were talking about, Chris, the crowdsourcing. So there are these marketplaces for teachers to share best practices and lesson plans and to crowd-source ideas and professional development.

KENNEALLY: And as anyone's looking into this topic of OER, they should know some of the players and some of the places they can go to learn more about what people are using, how they are using these materials, and possibly even to look for potential partners, as well. So you have broken that down to repositories of OER content to this whole-course content development notion, as well as to these marketplaces where there's a mix, a blend of both. So tell us about some of these important partners. Some names we'll recognize. There's Amazon – surprise not to find Amazon, I suppose, these days – as well as some other companies people may not know about. Tell us about it.

O'DONNELL: When Amazon Inspire launched a year and a half ago, whatever it was, everybody thought they'd take over, but it really hasn't caught on in a big, huge way. But the repositories of open education resources are the lead ones.

A couple I would like to mention are Knovation, because that's taking a little bit of a different approach. They are the only that's aligned to all grades, all levels, all subject



areas. A lot of these are scattered. One of the problems teachers complain about is it takes too much time because you can find one thing for one standard, but not another thing for another standard. The Better Lessons (sic) is an open education lesson plan sharing. That's really, to me, a very interesting movement in K-12. If you look over on the right at the marketplaces, Teachers Pay Teachers, as of 2015, had 3.5 million teachers on it. TES is a global marketplace of lessons, lesson plans, and open content, and it's 7.6 million teachers on it. All of those have a mix of free stuff, and then teachers can put them on and get paid for it, and other teachers buy it from them. You don't see that behavior at all in higher ed, so it's a very different market there. Then you've also got these whole course, and these are really great nonprofit organizations, I believe all three of them are nonprofits, that are really trying to solve for the Common Core and for math and ELA.

KENNEALLY: Just as we saw, Carrie, some of the major players in the K-12 scene, you've put together a similar chart for us, very useful, as to who's providing repositories, who some of the publishers are of OER content. Some of them are now in partnership with other, more traditional publishers, as well as some of the courseware and platforms. So take us through all of that.

O'DONNELL: First off, the leader/early player/early adopter of embracing OER is California, the state. The state funded Cal State University to create MERLOT, which is this very, very comprehensive resource. But like every other repository, or many other repositories of open content and like, you have to poke through it, it's hard to find things, and people have a really hard time discovering and vetting open content, even though there's this huge resource, MERLOT, and it's good, and a lot of people use it.

Then there's three things there, that are Minnesota and Washington and California Cofer Ed (sp?) that are their open textbook libraries, and these are libraries of open books. They're primarily courses and courseware and open textbooks, and they're vetted by teachers. So a lot of these states – in Minnesota they have initiatives that they're paying teachers to write open textbooks, and publish them and put them out there.

Then there's one major publisher of open textbooks, that's OpenStax, and they have about 30 books. It's a nonprofit out of Rice University that has been highly funded by a lot of foundations and family foundations. FlatWorld was the first big publisher of open textbooks, and we were involved in that, in late 2007 they started, I think. But they're now commercial and affordable. The publishers are really starting to get behind creating open publishing models. So Cengage, particularly is behind it with OpenNow. There's a company called Boundless that I'm not sure if it's still around. I think it's being distributed by another player.

The real opportunity we see in higher ed are to marry open content with technology and courseware platforms. The early player was Sapling at MacMillan had a big relationship with OpenStax and put lots and lots of great assessment content around the OpenStax science textbooks.



Lumen Learning is a big player. It was founded by David Wiley, who I mentioned earlier, and they curate OER for different courses, and for some courses they have courseware, as well. Other players are getting into it in a big way, including the distributors like Barnes & Noble and some of the other technology players – Newton, Top Hat.

KENNEALLY: What's interesting there is although this is an open environment, it is an environment that is now including many traditional players, so we're seeing names we recognize, along with some of those very new names. We're seeing Amazon, Cengage, MacMillan had been involved with Sapling Learning, Barnes & Noble. Are you seeing more of that happen, where the traditional players, the existing players are coming in and exploring this?

O'DONNELL: Yeah, and I just want to make a comment on that, and I should have made it earlier. Basically a lot of what's happening is that they're combining services with open content. So they're curating a course or they're basing it on an open textbook, and then they're adding not only their technology and learning management systems or courseware systems, but they're also adding adaptive features and they're adding a lot of quiz questions and assessment questions and activities, and links. So they're combining curated open stuff with stuff that they have that's paid and commercial. And they're offering it for lower price rates, usually anywhere between \$25 and \$100.

KENNEALLY: So Carrie, as we push towards the big reveal here on the opportunity, let's talk about some of the challenges. We come back to that three-legged stool of affordability, flexibility, and time. Those are playing a role in the challenges, the obstacles, as well.

O'DONNELL: Yeah. And first off, I want to thank Paul Volpeil (sp?) for clarifying my comment on Boundless. In May 2017, it was announced that Boundless course materials would not be available, so they're no longer available. But Lumen Learning archived the Boundless collection on the Lumen platform. Thank you. Thanks, Paul.

I think that affordability is a no-brainer because it's the greatest opportunity and the greatest – for me an opportunity is always a challenge, so affordability is the greatest opportunity and the greatest challenge because affordable doesn't have to be open, but it also is hard to get the kind of quality that you want with completely free.

Flexibility is a huge driver. Increasingly teachers and college faculty want control and flexibility. They want to be the owner of the content. With so much open content available in the world, and with their own ability to create their own content very quickly and easily and distribute it to their students, it's moved. When I first started in publishing – before I started O'Donnell Learn, I was in publishing – and at that time the textbook was the backbone to the course. Particularly in higher ed, you've seen that really, really shift as the textbook is seen as a teaching resource and a study resource and a test-taking resource, and not the core content of the course. So that kind of flexibility is really important to



instructors. There's a huge growth of user-generated content, and they want to share it because they want to be seen as thought leaders.

However, the big problem with it is time because it takes a lot of time to share best practices, it takes a lot of time to search and discover. There aren't really good, easy ways to search and discover, and they need help with curation and vetting, and that takes time.

KENNEALLY: It's an interesting point Carrie because as you say, the textbook is often what we all remember from our classroom experience in college because it's on our bookshelves still. We couldn't remember the professor's name after a few years, but we have the title right there in front of us. What you've just described is a real shift in the power balance towards the faculty, and it's something that publishers must be taking account of. That would really change a great deal for them.

O'DONNELL: Yeah.

KENNEALLY: Let's look at the opportunities here. As you say, challenges and opportunities, they're two sides of the same coin. You see opportunity in a lot of different directions. One area, particularly is the chance to move beyond the textbook, since in fact that's where the market is going anyhow.

O'DONNELL: Yeah, absolutely. Yeah. And we're starting to see this in publishers, distributors, I believe there's a huge role for aggregators to curate, mash up, and enable crowdsourcing of content for higher education courses to make it more affordable, to really take advantage of open, and to really take advantage of instructors' and teachers' special sauce.

Mike Sugarman (sp?) asked over here, where does assessment sit in the OER world? It's very interesting because there's a huge opportunity to crowdsource assessment. There are a lot of instructors who like to create their own assessments. They take great pride in assessments, and they want to be seen as thought leaders in sharing assessments, so there's a real opportunity. Right now, what happens is there are these open textbooks that are out there, and somebody's got to create the assessments to go with them. So if you're adopting a textbook, you're not putting together a course as much as you're adopting a textbook so you're really looking for those free supplements, such as assessments and test banks and quizzes and platforms to deliver them on, which is creating an opportunity for publishers.

I feel like there's continued growth in platform plays that allow you to make it really easy to provide curation, instructional design as a services, mashing up commercial and open, and enabling your users to become a community that crowdsources content for your open or partially open products. I think also there's a huge opportunity in mass customization – managed free resources and making it really easy for faculty and teachers to quickly tailor it on the fly, add their own user-generated content, see what their friend or neighbor's been



doing. There's been a lot of research lately that we've been involved in that has shown that the biggest driver, these days, of finding out about course materials is word of mouth and peer sharing.

KENNEALLY: The question people are asking, I'm sure, is when it comes to open, where's the money going to come from? You do see some potential revenue in all of this, though.

O'DONNELL: Yeah. Well, that's always a problem. The education marketplace is going through a very big shift in where does the money come from? I'm particularly expert in higher ed, that's a little more my area – my companies work in all areas. But you're seeing this shift from what's technology and what's software, and what's course materials, and who pays for what?

But the opportunities we see are in a couple of areas. One is you are starting to see state RFPs at both higher ed and K-12 for developing OER courses and curriculum, and for offering them and delivering them to the state. I think that there's a huge opportunity in the community colleges and in these free degree programs the community colleges are putting together. There's a bigger movement in OER and community colleges, I think. There just is a very large. For example, Maricopa – that's a big Arizona system – they did an RFP, they chose a few vendors, so now they're really encouraging their teachers and incentivizing them. Excelsior is a four-year program in New York. They're incentivizing their faculty to do it, and to use those OER. Then I think you're going to start to see OER offerings in these inclusive access programs for where the students go in and start.

KENNEALLY: Finally, look at some of the business models. There've been some announcements recently. You mentioned Cengage earlier, they just launched a subscription model, which is very interesting, indeed, that helps to control costs. There are some other membership communities and some channel partnerships. Is there anything emerging that's really dominating the field at this point? Or is it still just lots of different directions and nothing really clearly the leader at this moment?

O'DONNELL: Unfortunately the latter. I think you're really seeing people are playing around with subscription business models. They really want to use them. They want subscription. Particularly in higher ed, people want to license their content directly to institutions, directly to states, and it's complicated. In K-12, it's complicated, too, because of all the adoption processes.

KENNEALLY: Well, thank you for a look at the opportunity in OER for publishers, Carrie O'Donnell from Café Learn.

O'DONNELL: Thank you, Chris.

KENNEALLY: For all of us at Copyright Clearance Center and Ixxus, my name is Chris Kenneally. Thanks for joining us and have a great day.



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