

University of the Philippines Open University
Revised Open Educational Resources Policy and Strategies¹

1.0 Background on Open Educational Resources

Open educational resources (OER) are defined as “learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, re-purpose, adaptation, and redistribution by others. Open license refers to a license that respects the intellectual property rights of the copyright owner and provides permissions granting the public the rights to access, re-use, repurpose, adapt, and redistribute educational materials.” (UNESCO, 2019).

The World OER Congress held at UNESCO, Paris on 20-22 June 2012, enjoins countries to:

- foster awareness and use of OER;
- facilitate enabling environments for use of ICT;
- reinforce the development of strategies and policies on OER;
- promote understanding and use of open licensing frameworks;
- support capacity building for the sustainable development of quality learning materials;
- foster strategies alliances for OER;
- encourage development and adaptation of OER in a variety of languages and contextual contexts;
- encourage research on OER;
- facilitate finding, retrieving and sharing of OER; and
- encourage the open licensing of educational materials produced with public funds.

On the other hand, during its 40th session on 12-27 November 2019 in Paris, UNESCO recommended the following areas of action to “enable governments and education providers to evaluate the quality of the open access content and to optimize their own investments in educational and research content creation, as well as ICT infrastructure and curation, in ways that will enable them to meet their defined national educational policy priorities more cost-effectively and sustainably” (UNESCO, 2019, p. 5):

1. **Capacity building:** developing the capacity of all key education stakeholders to create, access, re-use, re-purpose, adapt, and redistribute OER, as well as to use and apply open licenses in a manner consistent with national copyright legislation and international obligations;
2. **Developing supportive policy:** encouraging governments, and education authorities and institutions to adopt regulatory frameworks to support open licensing of publicly funded educational and research materials, develop strategies to enable the use and adaptation of OER in support of high quality, inclusive education and lifelong learning for all, supported by relevant research in the area;

¹ Proposed revisions were first presented to the Chancellor’s Advisory Council on its 231st Meeting on 27 June 2023 and approved at its 235th meeting on 25 October 2023. Approved by the Chancellor on 13 November 2023.

3. **Effective, inclusive and equitable access to quality OER:** supporting the adoption of strategies and programmes including through relevant technology solutions that ensure OER in any medium are shared in open formats and standards to maximize equitable access, co-creation, curation, and searchability, including for those from vulnerable groups and persons with disabilities;
4. **Nurturing the creation of sustainability models for OER:** supporting and encouraging the creation of sustainability models for OER at national, regional and institutional levels, and the planning and pilot testing of new sustainable forms of education and learning;
5. **Fostering and facilitating international cooperation:** supporting international cooperation between stakeholders to minimize unnecessary duplication in OER development investments and to develop a global pool of culturally diverse, locally relevant, gender-sensitive, accessible, educational materials in multiple languages and formats.

2.0 Why UPOU should engage in OER?

Responding to the UNESCO's recommendations, UPOU has revised its OER's policies and strategies which are aligned with its vision. UPOU's vision is to be at the forefront of the knowledge society as a leading institution in open and distance e-learning (ODEL). UPOU seeks to provide wider access to quality higher education adhering to the highest standards of academic excellence, guarantee academic freedom, and encourage social responsibility and nationalistic commitment among its faculty, staff and students. UPOU aims to:

1. Provide opportunities for alternative access to quality higher education by offering baccalaureate and post-baccalaureate degree programs and non-formal courses by distance education;
2. Develop a system of continuing education for sustaining professional growth and improving technical skills especially for those who cannot leave their jobs or homes for full-time studies; and
3. Contribute towards upgrading the quality of residential instruction in the University and the educational system of the country, in general, by developing, testing and utilizing innovative instructional materials and technology, and sharing these with other colleges and universities through cooperative programs.

UPOU as an academic institution uses a wide range of teaching and learning materials using online technologies to deliver its courses. It encourages and supports the creation of educational and training materials for its academic programs and community extension work. UPOU believes that engaging with OER would facilitate development of quality teaching and learning materials at a more rapid and sustainable pace. It recognizes OER as key to its mandate to promote lifelong learning and provide access to quality education using ODeL-based materials and technologies.

3.0 UPOU OER Policy

Policy declaration:

Recognizing the importance of OER in providing access to quality materials and technologies, UPOU will:

1. *Support OER capacity building, awareness raising, use, creation and sharing at the institutional and national levels;*
2. *Promote the production, use and sharing of OER in support of quality teaching and learning;*
3. *Support the creation, findability, access, re-use, re-purpose, adaptation, and redistribution of inclusive, gender sensitive, and equitable quality OER for all local and global stakeholders;*
4. *Develop and adapt existing evidence-based standards, benchmarks, and related criteria for the quality assurance of OER;*
5. *Establish an open licensing framework;*
6. *Encourage and support research on OER, through relevant research programmes on OER development, sharing and evaluation;*
7. *Integrate the OER values and processes in institutional policies and systems/practices; and*
8. *Develop a comprehensive, inclusive, and integrated OER sustainability model.*

4.0 UPOU OER Strategies

To facilitate the implementation of the above policies, UPOU adopts the following strategies:

1. *Support OER capacity building, awareness raising, use, creation and sharing at the institutional and national levels*
 - Conduct trainings and workshops to capacitate faculty and staff of higher education institutions on the creation, use, and sharing of OER
 - Conduct OER awareness activities (e.g. open talk, webinars, research conversations, etc.)
2. *Promote the production, use and sharing of OER in support of quality teaching and learning*
 - Conduct seminars, workshops, and training programs to educate faculty, staff and students in creating, utilizing and sharing OER materials for teaching and learning
 - Curate subject-specific and discipline-based OER and OER repositories
3. *Support the creation, findability, access, re-use, re-purpose, adaptation, and*

redistribution of inclusive, gender sensitive, and equitable quality OER for all local and global stakeholders;

- Develop guidelines and training materials on producing OER and OER-based course packages with QA considerations
 - Provide technical support for the production of OER in various formats (e.g. video, podcasts, screencasts)
 - Incentivize the creation and promotion of OERs (e.g. integration in the evaluation criteria for the faculty promotion, professorial chair, and awards system; being part of the public service grant)
 - Subject all creation of OER to the QA process of the University
 - Create a stakeholders' feedback system for the continuous improvement of OER
 - Build and maintain a repository of OER
 - Ensure the visibility and discoverability of OER by local and international audiences (e.g. indexing in prominent OER repositories and/or metarepositories)
 - Review UPOU OER for possible massive open online course (MOOC) offerings
4. *Develop and adapt existing evidence-based standards, benchmarks, and related criteria for the quality assurance of OER*
- Develop a quality assurance framework for the creation, access, re-use, re-purpose, adaptation and redistribution of OER
 - Adapt and/or modify existing evidence-based standards appropriate for UPOU's context
 - Develop a monitoring system on the educational effectiveness of OER
5. *Establish an open licensing framework*
- Develop a framework and policy on licensing
 - Develop guidelines for choice and use, including display, of licenses for educational resources produced by the University
6. *Encourage and support research on OER, through relevant research programmes on OER development, sharing and evaluating*
- Incentivize research initiatives on OER
 - Provide support for the dissemination of OER research findings
7. *Integrate OER values and processes in institutional policies and systems/practices*
- Evaluate institutional policies vis-à-vis the OER policy framework
 - Review UPOU's educational resources for compliance with the OER policy framework
 - Develop an effective management system for educational resources produced by UPOU
8. *Develop a comprehensive, inclusive, and integrated OER sustainability model*
- Create a mechanism that may provide revenues and sustainability to OER provision such as but not limited to partnerships and networking with local, national, and global academic institutions, communities of practice, and industries for the creation of OER, monetization of views of OER in social media platforms, and collaboration and cooperation with international agencies and organizations for research and development on OER.
 - Translate institutional and individual faculty members' outputs of their research and other projects into OER.

5.0 Scope

This Policy applies to all Faculties of Study of UPOU including academic support units, namely Center for Open and Digital Teaching and Learning (CODTL) and UPOU Library.

6.0 Responsibility and Authority

The Chancellor as the head of the University as well as the Vice Chancellor for Academic Affairs shall ensure compliance with this Policy. Other responsible units include Faculties of Study, CODTL, Library and Legal Office.

7.0 Definitions

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Massive Open Online Course (MOOC) – a course of study made available over the Internet without charge to a very large number of people (Oxford Dictionaries)

8.0 References

Creative Commons. About The Licenses. <https://creativecommons.org/licenses/>

Guide to Open Data Licensing. <http://opendefinition.org/guide/data/>

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