OE —— POLICY PROJECT ROADMAP

EMPOWERING ADVOCATES FOR CHANGE

OPEN
EDUCATION
POLICY FORUM

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Welcome to the Forum. This is a space for your notes, inspirations and contacts you will make during the next days.

1   PROJECT IDEA

Name and Organization:

Project Abstract:
Provide a brief description of your project and what you hope to achieve.
This will likely evolve as you work through the program. Try to keep it
succinct and written in plain language so that anyone in your target
audience can read it and understand what you are trying to accomplish.

Open Education Week Milestone:
Each project should be designed to reach a milestone that you can present
during Open Education Week in early March. This milestone can be defined
however you like, but it's best if it is something concrete that you can share
with the community. For example, it may be producing a report, strategic
plan, draft policy, or other document. It also could be an event or meeting.
The most important thing is to pick something you know you can achieve on
your own, and not something that depends on factors outside of your control.

Project Scope:
Define the scope of your project. This is the space in which your project will apply, for example a specific program, institution, state/province, or country.

Is your initiative:
- Small scale - project
- Medium scale - Institutional and thematic programs
- Inter-institutional and large scale
- National level
- International

What education sectors does your project involve:
- General school education
- Technical and vocational education
- Tertiary education
- Non-formal education and training

Problem:
Making the case for your open education project starts with outlining why there is a need for action. In other words, what is the problem with the status quo? What challenges are most holding back your education system that open education could help with?

Other considerations:
- What significance is this challenge in comparison to other problems in the current political environment?
- How drastic and urgent is solving the problem?
- Is there a clear and evident way to solve this problem through open education?
- What efforts are already underway to solve the problem, and why is that not enough?

Solution:
How does open education solve the problem(s) you outlined? What does the world (within your scope, perhaps) look like when the problem is completely solved? Your description of the solution will likely be broader than what your project will achieve, but your project should be making a step in this direction.

Other considerations:
• How likely is it that this solution will be accepted by politicians and educational leaders?
• How realistic is it that this solution can be implemented?

Opportunities & Alignment:
In what ways does your project align with broader initiatives relevant in your context? How does it fit into your institution's mission? Are there specific opportunities coming up that your project could take advantage of? How does it align with broader initiatives, such as the SDGs, UNESCO documents including the Ljubljana OER Action Plan, or the Cape Town Declaration +10 Framework?

3 STAKEHOLDERS

Stakeholders:
Stakeholders are the people who are affected by your project. Depending on your scope, examples include: students, teachers, administration, policymakers, parents, and employers. Think about what each stakeholder group cares about and how your policy idea could impact them.

Opinion Leaders:
Once you identify stakeholder groups, think about who are key opinion leaders in each of the groups. Opinion leaders are people who others listen to, and if you succeed in changing an opinion leader's mind, it can help change the minds of others.

Allies (and Opposition):
Who is allied with your mission? This can include potential partners who will actively be involved in supporting your work, and also high-level administrative supporters who can provide clearance or endorsement. Some allies may come from your stakeholder list, but not all of them. Also think about whether there is anyone who might oppose or work against your mission.

POLICY

Policy Description:
Describe the specific policy (or policies) involved in your project.
What does the policy require and who does it require to do it? You
can also use this space to brainstorm what a policy should look like
or describe what types of policies your project will focus on.

Building blocks of open education policy:
• **Adopting an open licensing framework**
• **Enabling development, storage and accessibility**
• **Aligning quality assurance procedures**
• **Supporting capacity building and awareness raising**
• **Encouraging sustainable business models and launching funding strategies**
• **Promoting research and evidence-base on the impact**
• **Governance mechanism policy**

Policy Stage:
There are different stages to the policy process, and it's important
to identify where your project will focus. Your project may
encompass all stages, or it may focus on only one.

The five stages are:
• **Agenda setting: identifying a need for policy**
• **Formulation: developing a policy to meet those needs**
• **Adoption: getting the policy passed**
• **Implementation: ensuring the policy is followed**
• **Evaluation: evaluating a policy's success**

Project Outcomes:
At the end of your project, what do you want to achieve? In your "Solution" you described the bigger picture of how you want to change the world. Now it's time to get specific and concrete. Write down the specific goals of your project that you want to achieve by the time the project is complete.

Outcomes should be:
- Specific
- Measurable
- Achievable

Policy Strategy:
Policy itself is not a goal. Policy is a tool that can be used to achieve goals. Explain your reasoning for why the policy you described (and/or the work you are planning to do with it) will help solve the problem you identified earlier and bring you closer to the solution. Also think about which of the three main policy instruments (regulation, funding and information) are core to your strategy.
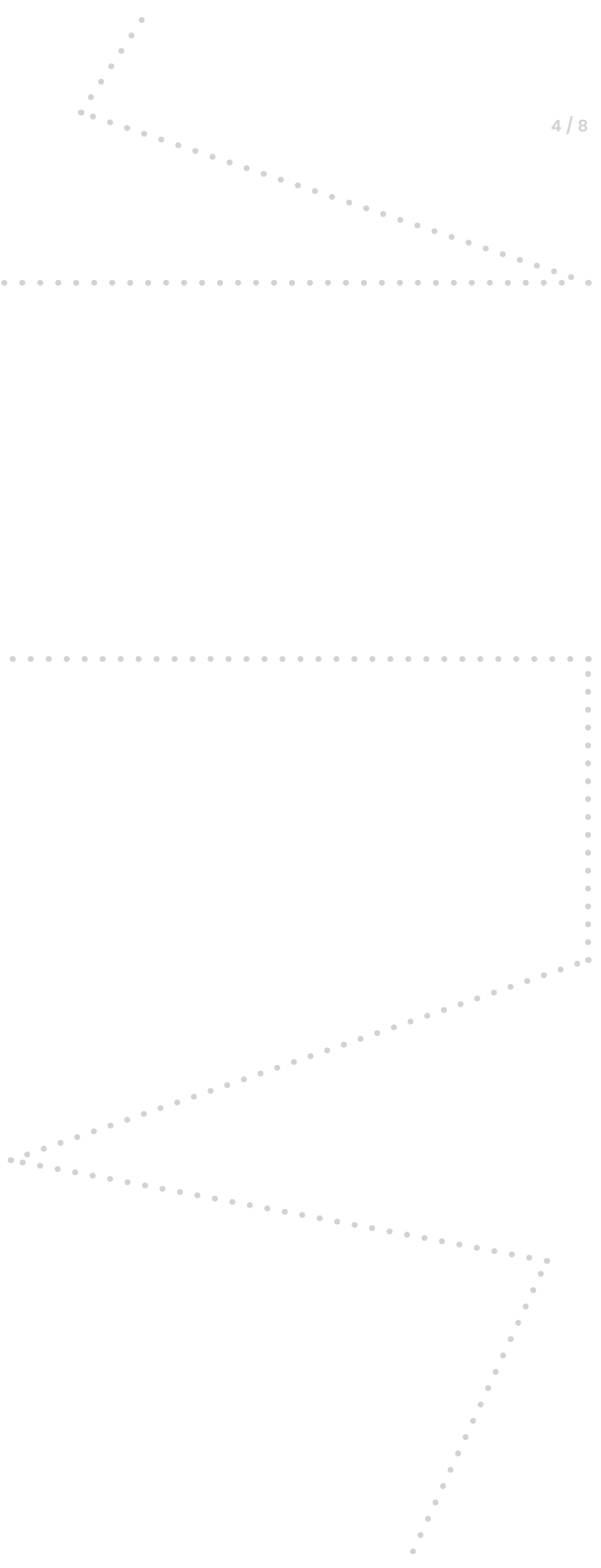
5 PROJECT PLAN

Project Activities:
Now that you have laid out your outcomes, it's time to describe the activities you will employ to reach them. It's often good to start with a brainstorm of all of the great ideas you can come up with, and then go through each one and ask yourself how well it achieves your outcomes. If you can't come up with a compelling explanation for why an activity will achieve your outcome, you may want to cross it off the list.

Project Timeline:
Depending on your project, activities may take the form of several sequential steps or phases, or they may all take place all at the same time. Sketch out a basic timeline for when each of the key activities need to take place, and when you hope to reach each of your objectives.

RESOURCES

Open Educational Resources:
How will OER will be involved in your project—i.e. will you be building it, adapting it, or curating collections? Think through your plan for where the OER will come from, how it is licensed, and what kind of technical tools or expertise is needed. If you are publishing it, think about where, how, and what conditions you want to set forth up-front (such as a grant agreement that specifies open licensing). Also be sure to consider Accessibility.

Staffing & Support:
Who will be involved in your project? At the very least it includes you, but think about who else might be involved in implementing your project—both formally and informally. This could include an advisory committee, colleagues, or partners. Will these people need any kind of professional development or training? If so, how can you help provide it?

Funding & In-Kind Resources:
What kind of resources are needed for your project to run successfully? This could include funding, time release, or other in-kind support like event space, graphic design, etc. If you are giving out funding or incentives, be sure to think about the process required and what conditions you want to place on it.

Partners:
Who is a partner for your project? Think about entities within and outside of your organization who can help achieve pieces of the project activities. Partners can be tactical (i.e. helpful for getting a specific activity done), or they can be strategic (i.e. having a relationship with the organization brings you closer to your goal).

Communications:
What are the key audiences who need to be aware of your effort while it's underway? What channels can you use to make them aware? What messages will resonate? Think about presentations you can make, communications you can send, and other ways of creating buzz. Think not only about how you are communicating information, but also how people can find and reach you.
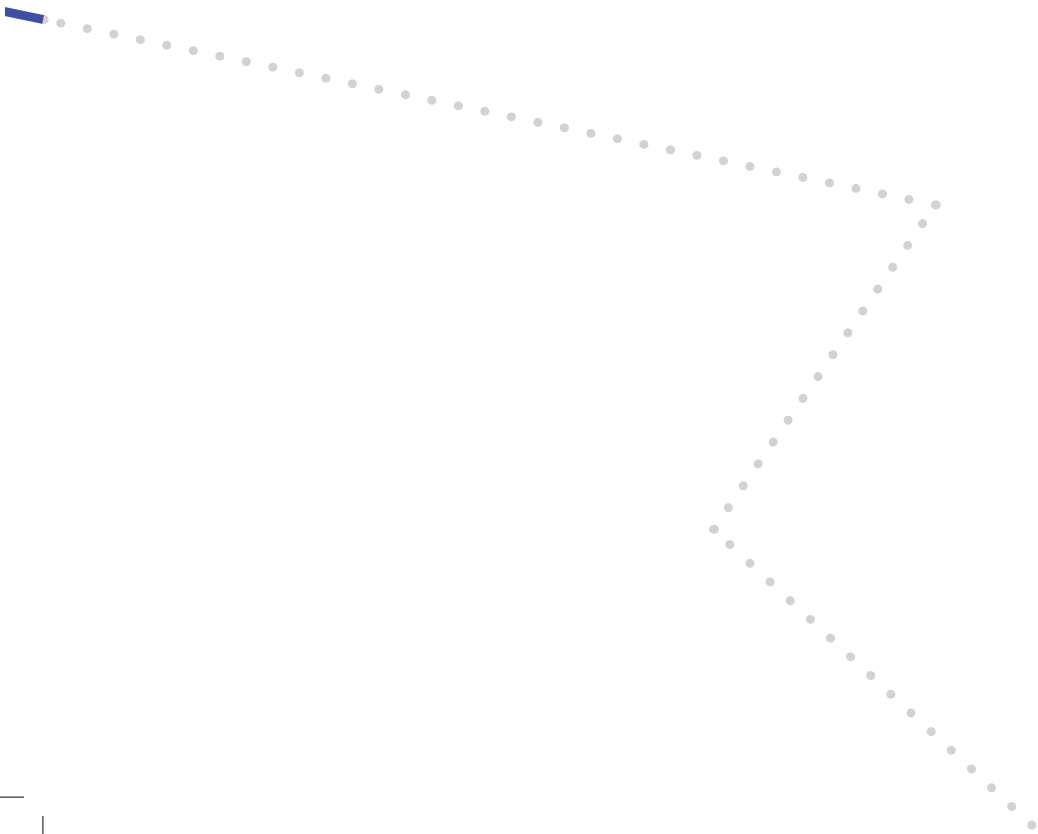
Evaluation & Assessment:
Think back to your goals. How will you measure if your project is a success? Think about ways that you can measure outcomes, both in terms of collecting feedback and also more quantitative measures. Brainstorm specific metrics that can define whether you have met your goal and how you might measure them. Your project may involve other evaluation activities, but this section should focus on evaluation of your project itself.

Rewarding Success:
Equally important as measuring success is how to celebrate it. How will you make sure campus is aware of the impact you have when the project is complete? How will you celebrate champions and reward those involved? How can you make sure the appropriate entities are aware of your accomplishments?

Frameworks & Norms:
What existing policies or cultural norms could affect your project? These could range widely from copyright policy to tenure and promotion customs to how the issue of open education is viewed. Generally short-to-medium term policy goals need to work within existing cultural norms and broader policy frameworks, and should not depend on changing them.
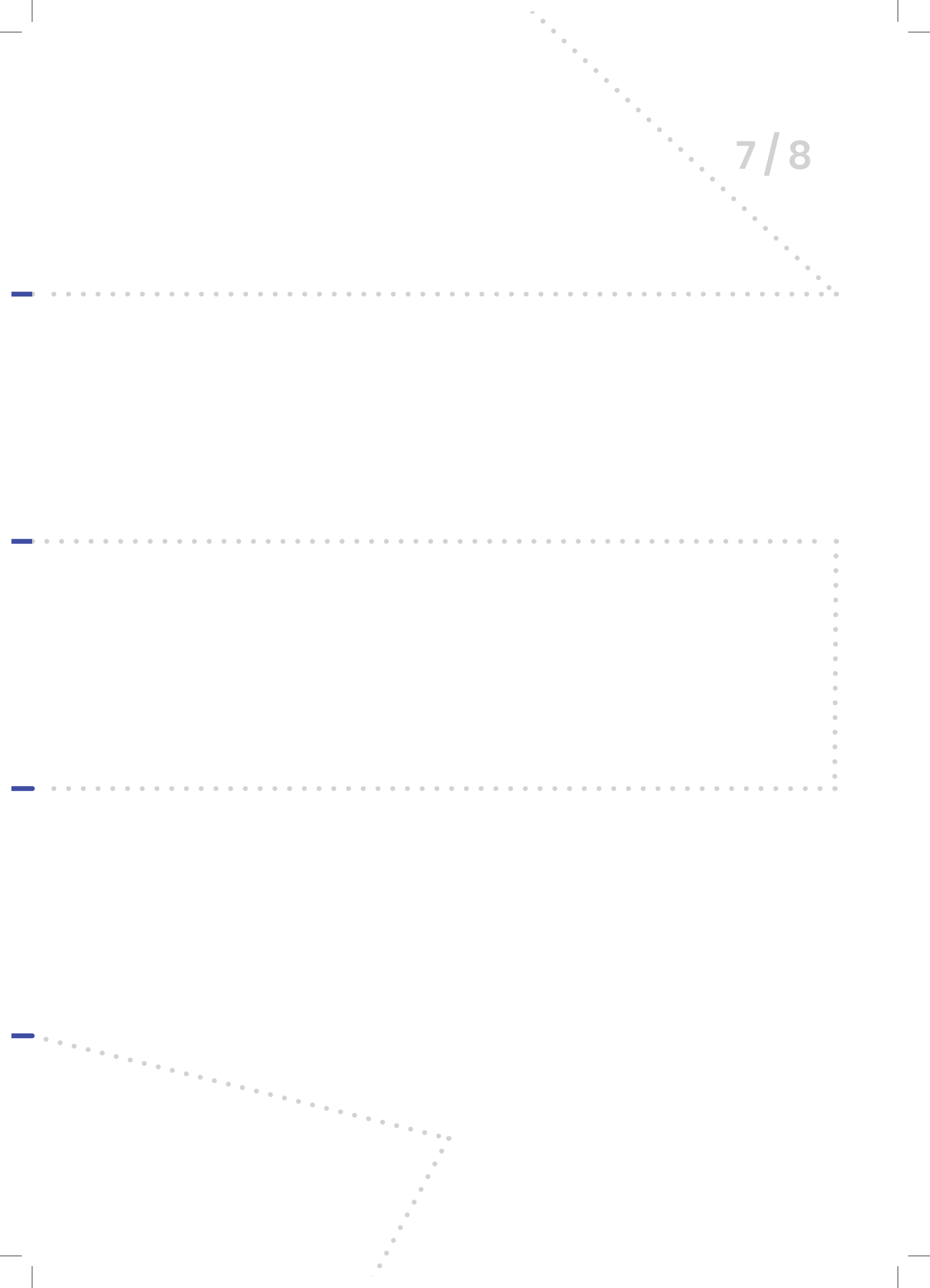
Barriers & Risk:
What are the biggest barriers or threats to success you could face? What steps could you take to mitigate risk of failure? If any of your potential challenges seem insurmountable or too risky, consider refocusing your goals on meaningful actions that are more achievable.

Institutionalizing Change:
Going back to the first section where you outlined the problem, how does this project fit into the larger changes you hope to see happen? How do you see your work feeding into building a culture of openness long term? What steps can you take now?

8 PERSONAL GOALS

Personal Leadership Goals:
What kind of leader do you want to be? What do you want to prioritize for your own personal growth as you work on your project? Identify a few ways you would like to grow as a leader that you will focus on during your project.

Next Steps:
Consider what comes after your project. If you see your project as the initial phase of a larger effort, describe your vision for the next steps. Consider how you or others might build upon your work once your project is complete.