



Mapping “A Situation of Open Education”: Using Collaborative Relational Mapping to Explore Motivations and Constraint Among Open Educators

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ABSTRACT

This short paper, analyzes “a situation of open education” using a relational map constructed in collaboration with a group of open educators as part of a larger study of the implications of scale within the field of open education. Applying situational analysis research methodology with its feminist and post-structural underpinnings, the purpose of this study is not to seek a “right” or “wrong” approach to scale but instead to invite a small group of open educators to deconstruct the concept of scale. This research approach is qualitative, critical and tentative and is written in the first person in alignment with the belief that research is neither objective nor neutral.

The relational map presented offers insight into the desires of open educators to increase access, enact social justice, extend beyond the course and reach wider audiences in ways that consistently reject mass standardization. It also highlights the ways in which their efforts are constrained by overwork, a constraint that compels some open educators to adopt large-scale technologies and approaches. Building the foundation for the next stages in the larger research project, it highlights open educators’ complicated relationships with scale. This paper concludes that there is a need to better differentiate the mechanisms of scale through which transformation with open education might be achieved.

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When it comes to scale, bigger is generally accepted as better. In business, politics and online social networks, growth in stock prices, political and economic influence and user counts are typically treated as positive (Rosecrance 1999; Tomasko 2006). Similarly, within the field of open education, scaling up has often been treated as positive and there has been little discussion with respect to its implications (Knox 2014; Mackness & Bell 2015). Seeking to explore this issue in more detail, my current doctoral work is guided by the research question: According to open educators, what impacts might scale, and different approaches to scale, have on learning conditions and practices within open education? In alignment with my chosen methodology, situational analysis (Clarke, Friese & Washburn 2018), the first step of this exploration involved describing the “situation of open education.”

This short paper focuses on the output of one situational mapping technique intended to more clearly define the “situation of inquiry” (Clarke, Friese & Washburn 2018). To that end I first explore the literature as it relates to open education, open educators and scale. I then introduce situational analysis and my overall research design. Finally, I present my findings from a collaborative relational mapping activity, paying special attention to four motivators among the open educators who participated in my research including increasing access, enacting social justice, moving beyond the course and reaching wider audiences; and one constraint, overwork. The relational map presented here is not intended to be definitive, or even representational, but instead it is a dynamic representation of a complex field. In fact, one research participant suggested that it represented a form of crystallization (Ellingson 2014) in that “every time you look at it from a different angle, you see something else that helps you complete the whole.” As a result, it represents *a* situation of open education, rather than *the* situation of open education.

OPEN EDUCATION, OPEN EDUCATORS AND SCALE

The meaning of open education has shifted over time and continues to lack a consistent definition (Stracke et al. 2019). Throughout history, the term has been used to describe a variety of initiatives from the relaxation of entrance requirements to educational television (Edwards 2015; Baggaley 2012). With the advent of the internet, online information sharing became central in defining contemporary open education (Mackintosh, McGreal & Taylor 2011) and led to the emergence of high-profile initiatives, including OER and MOOCs (Bayne, Knox & Ross 2015). More recently, Open Educational Practices (OEP) have begun to emerge as practice-centered approaches that enable students to shape public knowledge (Koseoglu & Bozkurt 2018).

Nascimbeni and Burgos (2016) however, pointed out that most of the definitions of open education, like those presented above, tended to focus on the objects or practice of open education rather than people, specifically the open educators who:

use open approaches, when possible and appropriate, with the aim to remove all unnecessary barriers to learning. He/she works through an open online identity and relies on online social networking to enrich and implement his/her work, understanding that collaboration bears a responsibility towards the work of others (p. 10).

Cronin (2017) further emphasized the importance of conscious and continuous negotiation among open education practitioners. Tur et al. (2020) suggested:

The open educator is, on the one hand, an open creator of knowledge who is committed to providing high-quality educational resources and opportunities for all. On the other hand, the open educator is committed to open practices from a critical perspective, enabling the opening up of the whole teaching and learning process from design, to implementation and assessment with all the implications and possibilities for educational transformation that may ensue (p. 11).

These definitions emphasize the desire among open educators to remove barriers and to transform learning. At the same time, they are silent with respect to the mechanisms through which the scaling up of access and transformation of education might occur.

Kanuka and Conrad (2003) noted that historically where the term “open learning” was used, it suggested that the principle of economies of scale was being applied. Other scholars noted similar connections between open education and industrial production (Garrison & Anderson 1999; Garrison 1997; Peters 1994). Moreover, Kanuka (2008) noted that the field is often focused on the “incongruence and inconsistency in action between and among instructors, administrators, and students, and the ensuing disagreements that revolve around the means rather than the ends of education” (p. 111). Lee (2015) suggested that the resulting theory-practice gap in open education was being leveraged by neoliberal forces to intensify disjunctions and “potentially oppressive power relationships” (p. iii) as for-profit corporations, foundations and venture capitalists have filled the void and steered the open education agenda, often in troubling directions (Elias 2019). The purpose of my work is to explore the ongoing implications of scale within open education and among open educators.

BACKGROUND AND RESEARCH DESIGN

My research applies situational analysis as a “theory/ methods package” (Clarke, Friese & Washburn 2018). Situational analysis is not interested in the search for purity, a singular basic social process or an oversimplified model, but instead focuses on the ongoing deconstruction of what is, or *what we think is*, in order to make space for more nuanced perspectives, partialities and situatedness that more accurately reflect reality (Clarke 2003).

My research methods, approved by the Research Ethics Board at the University of Calgary, involved a three-phase approach. Drawing on the experiences of Mackness and Bell, 2015, in the first phase, I extended an open invitation to participate in an anonymous online qualitative survey. I received responses from 20 open educators who shared over 6,000 words related to their experiences with “big” and “small” approaches to open education.

I then invited a group of four women and two men (all given pseudonyms) to participate in Phases 2 and 3. They were selected through a process of purposive sampling, an approach that is interested in the usefulness of data in generating new ways of thinking rather than its objectivity (Clarke, Friese & Washburn 2018). Jonah is an educational technologist living in Saskatchewan. Charles is semi-retired and continues to teach part-time and lives in British Columbia. Kathleen works as a librarian and lives in Alberta. Tracy is an instructional designer and living in Ontario. Tess is a professor living in Ontario. Sara is a professor who lives in Egypt. They have all been involved in open education for at least five years. Together, they represented a variety of experiences and opinions. In Phase 2, I invited this smaller group of participants to asynchronously identify relationships and annotate an online map. In Phase 3, they discussed the ideas generated in the mapping activity in two focus groups. I then mapped the data gathered using relational, social worlds/arenas and positional maps. This paper focuses on the relational map developed in collaboration with my research participants.

COLLABORATIVE RELATIONAL MAPPING

Using the responses of the online survey as a starting point, I populated a Google Draw site with a series of words. I then asked the smaller group to draw lines between the elements of the messy situational map and add their comments to annotate these relationships. The output of their activity was a messy map (*Figure 1*).

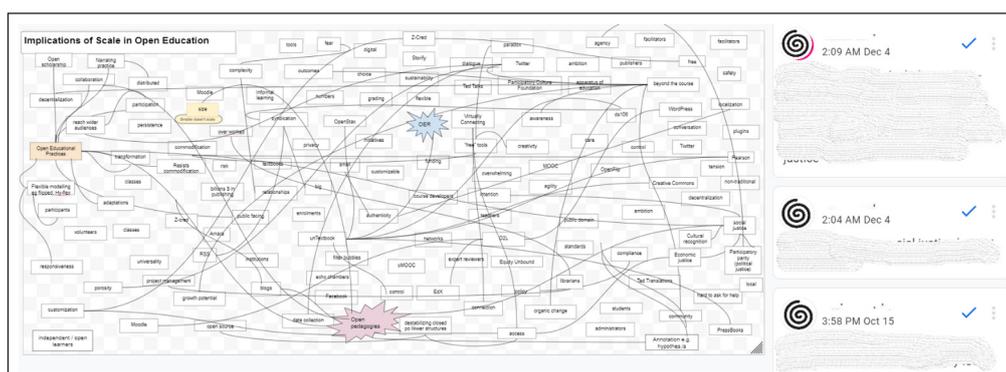


Figure 1 Collaborative Messy Map.

I then sorted and cleaned the map and organized the annotations to create a relational map. The cleaned relational map offers insight into a situation of open education as defined by a group of open educators (*Figure 2*).

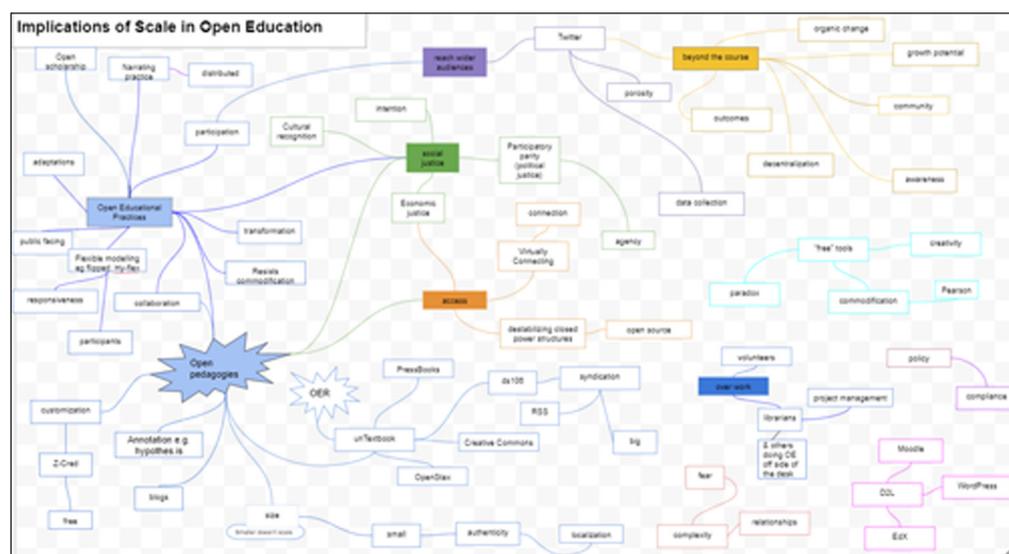


Figure 2 Collaborative relational map.

Through this process a complex situation of open education, including a series of themes related to the methods, motivations and constraints emerged.

A SITUATION OF OPEN EDUCATION

One survey participant expressed frustration with my broad definition of open education as described in the initial survey. She said,

I am having trouble not feeling frustrated with the *fuzzy* definition of open education. Openness in education has a notable and detailed history - e.g. the OPEN universities of the world (e.g. the Open University of Hong Kong, the UK, Athabasca University). Openness in education is very closely tied to the commodification of knowledge through copyright - yet your survey doesn't seem to reflect this foundational aspect.

This respondent expressed an opinion that is well aligned with the academic literature, and one that has often been aligned with industrialized, production models of scale (Garrison & Anderson 1999; Peters 1994). The opinions of other participants differed. In a focus group, Tess said, “What really jumped out at me was how many different thoughts people have about open education and their different ways of looking at it.” As she noted, open education involves a variety of types of projects, approaches to teaching and ways of sharing.

Survey participants highlighted a series of projects including “Z-Cred” textbook cost-free degrees, OpenStax textbook development projects, national OER initiatives, open infrastructure projects, MOOCs and development of open educational policies. Research participants provided examples of open education including class-level initiatives engaging with open resources, building communities beyond the classroom, public scholarship and open sharing at both the grassroots community and individual level. One survey contributor further suggested that what set open educators apart was not the output of their work, but their intentions. They said:

For me, open ed is the catchall space for a broad network of people generally aligned with destabilizing some of the closed power structures of higher education and academic publishing. Always in flawed ways, not an ideal, but nonetheless a big loose coalition of the more transformational people and concepts I have access to.

These open educators embraced broad and contextual definitions of “open.” They delineated a situation of open education that involves not only including OER, MOOCs, OEP and Open Textbooks projects, but also the ongoing work of practitioners seeking to transform a wide variety of educational practices in ways aligned with the literature (Cronin 2017; Tur et al. 2020).

METHODS OF OPEN EDUCATION

Looking more closely at the connections added to the relational map by a small group of open educators, they highlighted a series of methods, motives and issues that make up their current situation of open education. They referenced involvement with MOOCs, OER, OEP and open pedagogies using a wide variety of tools and structural approaches; OEP and open pedagogies emerged as central within the map itself. This focus seems to align with a larger shift in emphasis within open education from resources to practices. Despite their prominence in the mapping exercise I have opted not to address them within this paper but to instead address them in my future work. Here, I focus on four motivations and one constraint that emerged in the relational mapping activity.

MOTIVATIONS FOR OPEN EDUCATORS

According to the connections and annotations within the relational mapping activity, open educators appear to be motivated by issues of increasing access, enacting social justice, moving beyond the course and reaching wider audiences.

INCREASING ACCESS

Ideas of increasing access to educational opportunities are deeply engrained within open education (Anderson & Dron 2011; Cronin 2017). Charles highlighted the pre-internet historical connections to learning in flexible ways in terms of time, structure and geographical location. A survey contributor also noted “the potential for more equitable, immediate access to scholarly publications for all scholars around the world.” Other survey contributors were motivated to use OER to access resources not available in their university databases and as a way to access good-quality, free resources during the pandemic as existing library materials were no longer accessible to their students. In alignment with the academic literature, increasing access to educational resources was a key motivator for open educators who participated in my research.

ENACTING SOCIAL JUSTICE

Notions of access flowed directly into ideas of social justice. During the mapping activity Sara highlighted that “social justice includes an element of economic justice which often manifests as access.” She further explained these connections noting that “using no or lower cost learning materials can be transformative for students on an individual financial level.” Beyond economic justice, mapping participants further highlighted the importance of social and political justice. Unlike open education’s documented connections to access, explicit references to social justice within the literature of open education remained scarce until recently (Lambert 2018).

Among the open educators whose primary motivation is working towards increased social justice, research participants highlighted the critical importance of intention. Sara further noted on the map that “openness in itself, or any of the isolated tools or technologies associated with it, doesn’t have the agency to address social justice at any scale.” Within one of the focus groups, Charles picked up this idea. He highlighted that in the map annotation Sara had raised an interesting question about “the difference between intention and structure in open education and how those two relate; intention being what are you really trying to do in terms of social justice... versus the structures that enabled [it].” This comment suggests that there is an ambivalence with respect to scale and the mechanisms for achieving it. These open educators recognized the economic benefits of increased access, often achieved via prescriptive, production models (Garrison & Anderson 1999; Peters 1994). They also, however, clearly identified the need to address participatory parity and enable agency. Probing deeper in one of the focus groups, Sara described a vision for achieving scale that did not involve a single person teaching 1000 people in the same way that she teaches 20, but instead adding additional people capable of transformative teaching. Where open educators are motivated by a desire to enact social justice, scale and the mechanisms through which scale is achieved are complex and point to a critical need to untangle these connections. I will return to these ideas in more detail in my future work.

MOVING BEYOND THE COURSE

Another source of motivation for open educators identified in the collaborative mapping activity was the idea of moving beyond the course. This idea came up in both focus groups. In one focus group, Tess explained that “if you have an authentic audience, it doesn’t really matter that the teacher isn’t reading it.” Jonah further explored the ways in which working in the open can extend the reach and notion of responsibility for both students and teachers. In the other focus group, Charles said, “The idea of ‘beyond the course’ is a core aspect of my pedagogical interests. I see the course not necessarily as a thing in itself, but as a resource to prompt the learner to thinking in a deepening caring and growing manner about not just content but what it connects to.”

Similar ideas emerged among survey contributors, one of whom explained, “Open tools such as WordPress enable a more free-form way of putting students’ thinking out in public and gives faculty a feel for their history beyond the individual course.” Another survey contributor offered an example from a digital storytelling course entitled ds106 that was first run at the University of Mary Washington in 2010 (<https://ds106.us/about/>).

The thing about ds106 is that the offerings are usually centered on a small (class sized) group being taught as a for credit course, and the participation is opened on top of that to the open community. The same experience is not expected for all, open participants choose their level of participation. But even these numbers are not huge, but the interactions with the registered students is nearly always with a positive impact on the experience.

Echoing these ideas, another survey respondent suggested that open courses “create opportunities to be more creative and think about a larger audience than the instructor.” In these cases, moving beyond the course appears to be less about scaling in terms of the number of interactions per se, and more about creating connection beyond the scope of a course itself.

REACHING WIDER AUDIENCES

Focus group participants and survey contributors further highlighted the importance of reaching wider audiences within the context of personal and professional development. Describing a MOOC geared towards open educators, one survey contributor highlighted that “many people formed deep and lasting connections with each other through their smaller conversations on social media or blogs. This group still has ties to each other today.” Another survey contributor further described that “the bigness of being spread over time means that I improve my work, and I also have a chance to grow my network of ‘online awareness.’” Within the map annotations, a participant further highlighted the value of public scholarship as an example of an open educational practice. Sara explained that, for example, “narrating practices are an example of OEP which *helps* with scale because it makes it possible for others to replicate a small intervention within other pockets.”

These references to reaching wider audiences highlight an underlying desire among open educators to scale up not in prescriptive ways that generate increasing levels of efficiency, but instead in ways that seem more closely aligned with holistic, growth models of scale (Franklin 1999). The tools used to reach wider audiences, however, often complicate these dynamics. For example, in the relational map, the idea of reaching wider audiences was connected directly to the use of Twitter, and a model of openness closely connected to a prescriptive, production-based model of scale (Franklin 1999). I will explore the implications of the use of corporatized tools among open educators more in my future work.

OVERWORK AS CONSTRAINT

The relational map also highlighted the ways in which their efforts were constrained by overwork, an issue to which participants continued to return. Almost every research participant referenced unpaid work in one way or another. Some respondents identified this lack of funding as a positive. One survey respondent, for example, wrote, “I like having no funding. This frees me and the participants from expectations and control by others.” Another respondent similarly shared “related to funding, the free control removes any pressure to deliver or even to complete the course.”

Other participants, however, spoke of overwork and underfunding as serious constraints to their work. In a map annotation Kathleen explained:

Librarians are often the stewards of infrastructure that house OERs and librarians sometimes have skills in project management which makes them well placed for this role. However, many librarians who work in the broad area of “open” are doing this work off the side of desk... I know many practitioners for who this is a struggle.

In the other focus group, Charles and Tracy discussed the need to build recognition for open education efforts into workload and tenure and promotion guidelines, and then expressed frustration with respect to the speed of structural changes regarding labour recognition. Kathleen explained, “I’ve been advocating for openness for over 15 years that haven’t seen much change in terms of institutional structures that incentivize or reward openness and so I find that really frustrating.” These persistent references to overwork and unpaid work, suggest another reason that open educators are reluctant to discuss scale. They tend to recognize the scope of the work required and their inability to do it without help. I will return to this issue and its relation to scale in my future work, but given the prevalence of these comments, overwork and recognition within open education are topics that deserve further exploration.

COMPLICATING NOTIONS OF SCALE

The open educators who participated in my research consistently complicated ideas of scale, regularly rejecting classifications of “big” and “small.” One survey participant described an infrastructure project that was built “from the ground up, so it is sort of a paradox in terms of big/small. Maybe it’s a small project with big potential?” The idea of small-scale projects with big potential was a common theme among participants. This perspective points to a desire/ hope/ expectation among open educators that their work will be transformational over time which is in alignment with the literature (Cronin 2017; Nascimbeni & Burgos 2016; Tur et al. 2020). Many participants echoed similar sentiments with respect to the need to scale up their transformational efforts, while at the same time demonstrating little consideration of the mechanics and dynamics through which these wider impacts might scale. In these ways, they simultaneously demonstrated a reluctance to talk about scale explicitly *and* an implicit awareness of the implications and dynamics of scale within the field. As these topics are not currently addressed within the literature, I will explore these apparent contradictions and their implications more in my future work.

NEXT STEPS EXPLORING THE IMPLICATIONS OF SCALE

The relational map introduced in this paper serves as the foundation from which to continue my exploration of the implications of scale within the context of open education. It will assist in determining what to include in my ongoing exploration and offers many threads to which I will continue to return. As I noted above, many open educators who participated in my research were reluctant to discuss the implications of scale directly. There appears, however, to be evidence that the ideas that motivate various open educators might align with different approaches to scale. One survey contributor noted, “Large networks of people can almost never stumble in step for long, so sometimes there’s productive tension that shapes the big ideas but more often there are limitations of human difference and communication that cause harm and factionalism without even necessarily being productive.” This comment suggests an awareness that enacting transformational change might require more than simply connecting large groups of like-minded ideas. It points to, what might be, an emerging awareness of the need to pay closer attention to the mechanisms and dynamics of scale within the field of open education if transformative aspirations are to be realized. These are ideas which I will continue to build upon.

AREAS FOR FURTHER STUDY

In terms of methods, the use of qualitative surveys paired with asynchronous mapping offers new possibilities in terms of open research among busy and time-constrained collaborators, particularly across time zones. Although I had planned this research approach pre-pandemic, it

turned out to be an approach perfectly suited to the times. In terms of ideas for future research emerging from the map itself not related directly to scale, there are many. From the issues discussed above with respect to overwork, the possibly increasing interest in social justice among open educators and what appears to be a shift away from content-based interests towards the process-based interests including open pedagogy and open educational practices deserve more attention. Returning to the idea of crystallization, open education is a complex field. Each time we choose to look at it from a different direction, we are likely to see something new that, put together, will help us to better understand the whole.

CONCLUSION

The collaborative relational map presented in this paper offers insight into the desires of open educators to increase access to, and social justice within, education. Moreover, it emphasizes their interest in creating connections that extend beyond courses as units of learning and reaching wider audiences. It, therefore, suggests that open educators have a keen interest in increasing and extending the scope of opportunities for learning while, at the same time, consistently rejecting the mass standardization of education. At the same time, the relational map highlighted the ways in which these open educators felt that they were constrained by overwork. For some of them, the adoption of large-scale technologies offered an opportunity to realize operational efficiencies able to overcome this constraint. As a result, the relational map points to open educators' complicated relationships with scale and a need to better differentiate the mechanisms of scale through which their transformational aspirations might be achieved.

COMPETING INTERESTS

The author has no competing interests to declare.

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