Project Agreement Number: 519138-LLP-1-2011-1-UK-KA3-KA3MP
Project funded by the European Commission

Deliverable D6.4

Workshops with national OER initiatives

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Executive Summary

The original workplan stipulated three national workshops on OER initiatives, in three of four partner countries: UK, Hungary, Italy and Netherlands. Following the withdrawal of SCIENTER from the partnership, it was agreed to remove Italy from the list of study countries and with the lack of government interest in OER in Hungary, it was further decide to concentrate the national workshops in the UK and Netherlands.

In the event, three workshops were held in the Netherlands and two in the UK (England), together with separate webinars in Wales and meetings with key stakeholders in Scotland. The two UK-wide workshops took place at the OER13 and OER14 conferences (March 2013 and April 2014) and the three Netherlands workshops were organized through SURFacademy¹ in Enschede and Den Bosch (October 2013) and Heerlen (May 2014).

A journal article was produced following the first two Netherlands workshops and the English translation of this is given in full.

¹ http://www.surf.nl/diensten-en-producten/surfacademy/index.html
1 Introduction

1.1 The brief

This is Deliverable 6.4 of Work Package 6 of POERUP. The Deliverable Title from the proposal is:

3 workshops with National OER initiatives

The Work Package title is:

Exploitation

The brief for the Deliverable states:

It is likely that the workshops with national OER initiatives will be co-located in space and time with partner meetings 1, 2 and 4 – ideally the day before the partner meeting (noting that not all partners will be at the National OER meeting). Ideally all the main national OER initiatives in a country would be invited to such a meeting.

Since OUNL is based in Heerlen, remote from most Dutch institutions, this is one reason why the Dutch partner meeting may instead be in Amsterdam (see WP1 narrative).

These meetings may lead to the setting up of a National OER Advisory Committee in each of the countries – but this will be dependent on national policy relevance, enthusiasm and a degree of non-project funding.

1.2 Changes in practice

The workplan identified the UK, Italy, Hungary and the Netherlands as the four countries where national workshops might take place. The first workshop was planned to take place at the UK national OER13 conference at Nottingham in March 2013, and this occurred as planned. By then, however, it was becoming clear that SCIENTER, the POERUP Italy partner, was in severe financial difficulties and their bankruptcy led to their enforced removal from the partnership. They had reported little OER activity in the country. Furthermore, EDEN, the POERUP Hungary partner, reported little activity and interest at national level in the country.

It was therefore decided to concentrate on the UK and the Netherlands for the national workshops. The second UK-wide workshop was held at the national OER14 conference in Newcastle in April 2014 and three workshops in the Netherlands were organized through SURFacademy\(^2\) at Enschede and Den Bosch in October 2013 and Heerlen in May 2014.

Since education is the province of the devolved administrations in the UK, the national workshops held in England were supplemented by webinars in Wales (May 2013 and June 2014) and attendance at Open Scotland meetings (June 2013 and June 2014).

Reports on all these events are given in sections 2, 3 and 4 of this document.

2. Netherlands workshops

The first two Workshops were held in October 2013 and the third in May 2014:

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Place</th>
<th>URL</th>
<th>Presentation and moderator</th>
<th>Attendees</th>
</tr>
</thead>
</table>

Sample agenda:

**Programma strategieworkshop open en online onderwijs (voorbeeld 2)**

Datum workshop: @@@ 2013
Tijdstip: 13.00 – 17.00 uur
Locatie: @@@
Deelnemers: maximaal 12
Moderatoren: @@@

<table>
<thead>
<tr>
<th>Tijd</th>
<th>Programma</th>
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</thead>
<tbody>
<tr>
<td>13.00 uur</td>
<td>Introductie</td>
</tr>
<tr>
<td></td>
<td>Welkom door @@ met toelichting over doel, beoogd resultaat en opzet van de workshop.</td>
</tr>
<tr>
<td>13.15 uur</td>
<td>Trends in open en online onderwijs en de impact op het hoger onderwijs</td>
</tr>
<tr>
<td></td>
<td>- Wat is open en online onderwijs?</td>
</tr>
<tr>
<td></td>
<td>- Wat zijn motieven om al dan niet in te zetten op open en online onderwijs?</td>
</tr>
<tr>
<td></td>
<td>- Wat zijn de doelgroepen van open en online onderwijs?</td>
</tr>
<tr>
<td></td>
<td>- Wat zijn trends op het gebied van open en online onderwijs in de wereld en in NL?</td>
</tr>
<tr>
<td></td>
<td>- Waar staat het Nederlandse hoger onderwijs?</td>
</tr>
<tr>
<td></td>
<td>- Waar liggen kansen voor het Nederlandse HO, op institutioneel en landelijk niveau?</td>
</tr>
<tr>
<td></td>
<td>- En wat is daarvoor nodig?</td>
</tr>
<tr>
<td></td>
<td>- Wat doen SURF en de SIG OER?</td>
</tr>
<tr>
<td></td>
<td>Presentatie door gastspreker @.</td>
</tr>
<tr>
<td>14.00 uur</td>
<td>Wat is de mogelijke impact van de geschetste ontwikkelingen op het Nederlandse (hoger) onderwijs?</td>
</tr>
<tr>
<td></td>
<td>In plenaire setting discussiëren over:</td>
</tr>
<tr>
<td></td>
<td>- Wat betekenen de geschetste ontwikkelingen voor onderwijsinstelling X / het Nederlandse (hoger) onderwijs?</td>
</tr>
<tr>
<td></td>
<td>- Welke ontwikkelingen zullen de meeste impact hebben voor onderwijsinstelling X / het Nederlandse (hoger) onderwijs?</td>
</tr>
<tr>
<td>15.00 uur</td>
<td>Kansen en bedreigingen</td>
</tr>
<tr>
<td>-----------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Onder leiding van gespreksleider @@ maken we een vertaalslag van de genoemde conclusies naar kansen en bedreigingen voor onderwijsinstelling X / het Nederlandse (hoger) onderwijs:</td>
<td></td>
</tr>
<tr>
<td>- Uitwerken SWOT-analyse</td>
<td></td>
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<table>
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<tr>
<th>16.00 uur</th>
<th>Actielijnen</th>
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<tbody>
<tr>
<td>Onder leiding van gespreksleider @@ gaan we brainstormen over de vraag:</td>
<td></td>
</tr>
<tr>
<td>- Wat zou de rol van instelling X kunnen zijn om de kansen te verrijken of de bedreigingen te ondervangen? Wat is daarvoor nodig?</td>
<td></td>
</tr>
<tr>
<td>- Wat zijn mogelijke actielijnen?</td>
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</tbody>
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<tr>
<th>16.55 uur</th>
<th>Afronding met terugkoppeling resultaten en follow-up</th>
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<tbody>
<tr>
<td>Samenvattende en concluderende woorden door @@.</td>
<td></td>
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</table>

This was varied according to circumstances, as was the introductory presentation:

**Waar gaan we het vandaag over**

1. Wat hadden wij voor ogen met de strategieworkshops?
2. Wat is er tot nu toe uitgekomen?
3. Zelf aan de slag?
4. Q&A
WAAROM strategieworkshops?

Aanleiding:
• onderzoek ‘Een OER-Hollands landschap’ (oktober 2012).

Doelen:
• Faciliteren bij ontwikkelen visie op of beleid voor open education.
• Expertise en kennis delen.

HOE ziet zo’n workshop eruit?

• Workshops met nadruk op (1) informeren, (2) opinievorming of (3) ontwerpen.
• Voor maximaal tien Nederlandse hogescholen en universiteiten (op locatie).
• Door een vaste coördinator met een pool van moderatoren en sprekers.
• Met een programma ‘op maat’, gebaseerd op een intakegesprek.
• Voor minimaal 10 en maximaal 45 deelnemers > gemêleerde groep.
• Maximaal een dagdeel.
Voorbeeld: vragen intakegesprek

- Wat is de aanleiding om een workshop te organiseren?
- Wat is het doel dat de instelling heeft met de workshop?
- Wie zijn de doelgroepen die jullie voor de workshop willen uitnodigen?
- Wat zijn de kernvragen die tijdens de workshop aan bod moeten komen?
- Wat is de bestuurlijke context?
- Wat is het beoogde resultaat van de workshop?
- Wat is het kennis- en ervaringsniveau van de deelnemers ten aanzien van OER / open education?
- Kan er gewerkt worden met ‘opdrachten of ‘huiswerk’ vooraf?
- Hoeveel tijd is beschikbaar (minimaal een dagdeel)?

WAT doen we in 2013?

Voorbeeld:

<table>
<thead>
<tr>
<th>Tijd</th>
<th>Hoofdteken</th>
<th>Beschrijving</th>
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<tr>
<td>09.00</td>
<td>uur</td>
<td>Welkom door voorzitter CvB</td>
</tr>
<tr>
<td>09.10</td>
<td>uur</td>
<td>Introductie strategieworkshop</td>
</tr>
<tr>
<td>09.15</td>
<td>uur</td>
<td>Plenaire presentatie door gastsprekers: ‘Trends in Open Education en de impact op het hoger onderwijs</td>
</tr>
</tbody>
</table>
| 10.00 | uur        | Brainstorm in groepen met plenaire terugkoppeling: (1) wat is de mogelijke impact van de geschetste ontwikkelingen voor onze instelling? (2) waar liggen
Open Education: kansen

- Verhoging van de kwaliteit van onderwijsmaterialen
- Verhoging van de kwaliteit van het onderwijs
- Middel tot innovatie van het onderwijs
- Instrument ter vergroting van flexibiliteit onderwijsprogramma
- Instrument ter verbreding van het onderwijsaanbod
- Kostenverlaging
- Beter gebruik van interne en externe kennis
- Vergroting van de zichtbaarheid
- Te gebruiken voor regionale, nationale en internationale profilering
- Te gebruiken bij voorlichting en (zelf)oriëntatie
- Beter gebruik van interne en externe kennis
- Bereiken van nieuwe doelgroepen
- Aantrekken van internationale studenten en staf
Open Education: ervaringen opdoen

- Begin klein:
  - Stimuleer dat docenten OER gebruiken voor verrijking en uitbreiding.
  - Stimuleer docenten om zelf een MOOC of andere vorm van open onderwijs te volgen.
- Organiseer dat docenten aangeven welke materialen (Youtube, Google Scholar, OCW, OpenUpEd, OpenLearn, EdX, enzo.) voor studenten geschikt zijn.
- Begin met het delen van leermaterialen met (vak)docenten van verschillende instellingen.
- Schakel het beroepenveld in voor het ontwikkelen en (her)gebruiken van open leermaterialen.
- Organiseer hybride vormen van onderwijs en een dialoog rondom open content.
- Faciliteer de experimenten.

Open Education: bedreigingen

- Ontbreken van visie op open (online) onderwijs
- Geen onderdeel van de instellingsstrategie
- Organisatie is er niet klaar voor
- Openheid is bedreigend
- Vrees voor identiteitsverlies
- Zichtbaarheid is vergroting van de kwetsbaarheid
- Accreditatie kan probleem worden
- Hoe verdienen je investeringen terug?
- Is er nog wel plaats voor ons?
- Hoort niet tot onze opdracht
Open Education: visie en beleid ontwikkelen

- Begin aan twee kanten tegelijkertijd: bottom-up en top-down.
- Begin met experimenten, om te ervaren en te leren.
- Ontwikkel een visie en een beleid ten aanzien van open onderwijs: waarom en tot op welke hoogte wil een instelling meedoen, wat zijn prioriteiten, hoe verhoudt open onderwijs zich tot andere onderwerpen van de onderwijsagenda, hoe versterkt open onderwijs de ‘core business’ van een instelling etc.
- Docenten spelen een cruciale rol: wat is meenewaarde, wat vraagt het, hoe moet en kan het?
- Als een instelling MOOC's of andere vormen van open onderwijs wil gaan aanbieden, begin dan met de ‘parels’ / “names” / “topgebieden”.
- Innovatie door middel van open onderwijs vraagt om aandacht en kost geld: wijs middelen (geld en mensen) toe.
- Er zijn mogelijkheden voor samenwerking tussen instellingen: onderzoek vaardigheden in het hbo en het medische domein, deficiëntie-vakken, schakelvakken etc.
- Open Education als kenmerk van de instelling: vraagt om cultuuromslag.

Open Education: portfolio van

**Ervaringen opdoen**

- Begin klein: (1) Stimuleren dat docenten OER gebruiken voor verslag en uitstalling en (2) Stimuleren docenten om zelf een MOOC of andere vorm van open onderwijs te organiseren dat docenten aangrijpen, welke materiaal (vrije teksten, Google Scholar, OER, OpenLearn, etc.)
- Begin het delen van weergegevens met vakcollaboratie (bakensant)
- Schakel het beroepsverband in voor het ontwikkelen en deelsetting
- Organiseer hybride vormen van onderwijs en een dialoog onderwijs
- Faciliteer de

**Beleid ontwikkelen**

- Begin aan twee kanten tegelijkertijd: bottom-up en top-down. Begin met experimenten, om te ervaren en te leren.
- Ontwikkel een visie en een beleid ten aanzien van open onderwijs: waarom en tot op welke hoogte wil een instelling meedoen, wat zijn prioriteiten, hoe verhoudt open onderwijs zich tot andere onderwerpen van de onderwijsagenda, hoe versterkt open onderwijs de ‘core business’ van een instelling etc.
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- Innovatie door middel van open onderwijs vraagt om aandacht en kost geld: wijs middelen (geld en mensen) toe.
- Er zijn mogelijkheden voor samenwerking tussen instellingen: onderzoek vaardigheden in het hbo en het medische domein, deficiëntie-vakken, schakelvakken etc.
- Open education als kenmerk van de instelling: vraagt om cultuuromslag.
### Proces

- Niets doen is geen optie!
- “Van MOOC’s naar Open Education”.

- Aanpak: combinatie van bottom-up en top-down.
- Ervaringen opdoen en tegelijkertijd visie- en beleidsontwikkeling.
- Koppelen aan de onderwijsagenda.
- Niet alleen kijken naar “zelf ontwikkelen”, maar ook naar “hergebruiken”.

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<tr>
<td>Enthousiaste mensen</td>
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<tr>
<td>- Bestuurlijke dekking</td>
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<td>- Financiële aspecten</td>
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<tr>
<td>- Schaalbaarheid</td>
</tr>
<tr>
<td>- Professionalisering</td>
</tr>
<tr>
<td>- Faciliteren</td>
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- Deelnemers: doornsode van de instelling.
- Bestuurlijke dekking en zichtbare betrokkenheid.

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### ZELF AAN DE SLAG?

![Toolbox](https://example.com/toolbox_image)
The agendas, presentations and background documents are all saved in a Toolbox at http://tinyurl.com/toolboxopeneducation and a video from one of the workshops is on YouTube at https://www.youtube.com/watch?v=4imzKxpbNQ.
3 The UK workshops

The first UK-wide workshop was held during the OER13 conference at Nottingham University, in March 2013\(^3\). This was one of several POERUP sessions at the conference – for an external account of these see the blog at [http://oer13.wordpress.com/](http://oer13.wordpress.com/). There were around 20 participants in the workshop, who provided valuable discussion and ideas in developing policies for the UK, especially the university sector.

The second UK-wide workshop was held during the OER14 conference at Newcastle University in April 2014\(^4\). By this stage, the project’s EU-wide policy recommendations were in final draft form and the main purpose of this workshop was to stimulate institutional leaders to develop policies in their own sectors and organizations. The presentation for the workshop is shown below:

![Workshop: A DIY kit for policy formulation for OER in HE and FE](http://www.poerup.info)

**POERUP: summary**

- Inventory of more than 400 OER initiatives worldwide
- 30 country reports – 3 more ongoing – all being updated
- 7 case studies including **ALISON**, OER U and **FutureLearn**
- 3 generic policy documents: universities, VET and schools
- In progress: Policy documents for UK (E, W, S), Ireland, France, Netherlands, Spain, Poland – and Canada
- Project finishes end June 2014, reports 1 September 2014

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\(^3\) [http://www.medev.ac.uk/oer13/programme/](http://www.medev.ac.uk/oer13/programme/)

Opening Up Education

The recommendations for member states – some key examples

Giles

Open dissemination

• Ensure that all educational materials (supported by Erasmus+) are available to the public under open licenses; and promote similar practices under [other] EU programmes

Innovation

• Support innovative teaching and learning environments; through the use of structural and investment funds
• Support educational institutions in developing new business and educational models and launch large-scale research and policy experimentations to test innovative pedagogical approaches, curriculum development and skills assessment.
• Establish a European Hub of Digitally Innovative Education institutions, showcasing and piloting innovative ICT-based pedagogical and organisational practices, complemented by a specific European Award of Digital Excellence
Professional development

• Support teachers' professional development;
  – through open online courses, following pledges made under the Grand Coalition for Digital Jobs
  – and by creating new and scaling up existing European platforms for teachers' communities of practice (e.g. eTwinning, EPALE) to establish collaborative peer-based teaching practices across the EU.

(Self-)Accreditation of learning

• Explore and test, in cooperation with stakeholders and Member states, digital competence frameworks and self-assessment tools for learners, teachers and organisations
• Explore how established and emerging tools for the validation and recognition of skills, such as 'open badges', can be tailored to the needs of learners

Opening Up Education – what’s not highlighted?

• Accessibility
• Awareness raising – except for the OpenEuropa portal
• Copyright and licensing reform
UNESCO OER Declaration

Revisited and revised

Paul

UNESCO OER headings x 10

1. Foster awareness and use of OER
2. Facilitate enabling environments for use of Information and Communications Technologies (ICT)
3. Reinforce the development of strategies and policies on OER
4. Promote the understanding and use of open licensing frameworks
5. Support capacity building for the sustainable development of quality learning materials
6. Foster strategic alliances for OER
7. Encourage the development and adaptation of OER in a variety of languages and cultural contexts
8. Encourage research on OER
9. Facilitate finding, retrieving and sharing of OER
10. Encourage the open licensing of educational materials produced with public funds

1. Foster awareness and use of OER
   • Widen access to education at all levels, both formal and non-formal, in a perspective of lifelong learning (thus contributing to social inclusion, gender equity and special needs education); by the promotion and use of OER
   • Improve cost-efficiency of teaching and learning outcomes; through greater use of OER.
   • Improve quality of teaching and learning outcomes; through greater use of OER.
3. Reinforce the development of strategies and policies on OER

- **Within wider strategies for advancing education**, promote the development of specific policies for the *production of OER*.
- **Within wider strategies for advancing education**, promote the development of specific policies for the *use of OER*.

5. Support capacity building for development of learning materials

- Support institutions to **produce and share** high-quality, accessible educational resources, taking into account local needs and the full diversity of learners.
- **Train and motivate teachers and other personnel** to produce and share high-quality, accessible educational resources, taking into account local needs and the full diversity of learners.
- **Promote quality assurance** of OER (i.e. by formal QA mechanisms via national or regional agencies).
- Promote peer review of OER – and...?
- Encourage the development of **mechanisms for the assessment and certification of learning outcomes**; achieved through OER.
A worked example

Wales, in the UK context

Wales

- Population: 3.064 million
- Semi-autonomous part of UK, full autonomy in education
- Universities: 8 (was 11) – directive former minister
- Hegemon: no overall hegemon though in distance learning the UKOU is dominant
- Significant cross-border flows
- Substantial (for Wales) recent investment in IT in HE
- Significant policy development also

General approach of POERUP

- Try to work with focal points within the country interested in OER and policy
- Be open as to our mission of writing an OER in HE policy for the country,
- but say we would prefer it if they drew on POERUP resources and advice to write their own
Wales vs New Zealand

Wales
- Pop: 3.1 million – part of UK
- GNI/c: $29420
- OER U members: 1 (uni)
- OER WG: yes
- Nat’l e-learning prog: recent
- Policy supportive of eL: yes
- Policy supportive of DL: yes?
- Coursera members: no

New Zealand
- Pop: 4.4 million – on its own
- GNI/c: $35,950
- OER U members: 7 (1 uni)
- OER WG: no
- Nat’l e-learning prog: no
- Policy supportive of eL: no
- Policy supportive of DL: no
- Coursera members: no

Existing HE policy in Wales #1

- Enhancing Learning and Teaching through Technology: a Strategy for Higher Education in Wales [5]: “a ten year strategy for the enhancement of learning and teaching through technology for higher education (HE) in Wales from 2007/08 to 2016/17”
Existing HE policy in Wales #2

• HEFCW Corporate Strategy 2013-14 – 2015-16:
  – “increased emphasis on innovative flexible learning, community and work-based provision”
  – “we will implement our part-time action plan and develop new innovative approaches for supporting flexible and part-time provision” [6]

Open & online: Wales, higher education and emerging modes of learning [9]

Report of the Online Digital Learning Working Group (set up by the Minister), March 2014
Recommendations to the Minister

1. **Widening access to higher education to sectors with low participation**
   - Fund the development of O&O resources for use in schools and colleges, with the aim of raising aspirations of learners from low participation backgrounds.
   - Investigate the use of Hwb as a host for the O&O resources developed, with the intention of establishing a central repository.
   - Extend the work of the Open University OpenLearn Champions project to cover the whole of Wales via the Reaching Wider Partnerships.

2. **Developing skills for the workplace and the Welsh economy**
   - Examine how online learning should be integrated into the approach for programmes funded through the European Social Fund.

3. **Developing Welsh language skills for employment**
   - Develop a Welsh language skills MOOC at higher education level so that students and work-based learners can develop their professional Welsh language skills and potentially seek certification for those skills.

Recommendations to HEIs

4. **Reviewing institutional policies, monitoring developments and exploiting opportunities**
   - Agree what the institution’s overall approach to open and online resources should be, monitor external O&O developments, and exploit opportunities to produce and use resources.

5. **Strengthening institutional reputation and brand**
   - Exploit open and online resources in appropriate circumstances to showcase the quality of learning opportunities.
Recommendations to **Minister & HEIs**

6. **Improving the skills of higher education staff**
   - Institutions should provide academic staff with the skills and support they need to make most effective use of open and online approaches to learning.
   - HEFCW should continue to contribute to the costs of Jisc’s programme on open and online resources and take advantage of Jisc’s expertise.

7. **Licensing and sharing open educational resources**
   - The Government should encourage the systematic adoption of open licensing for open educational resources produced by HEIs in Wales
   - Where possible staff and institutions should release open educational resources using an appropriate Creative Commons licence
   - Institutions should make open educational resources widely available, including via the Jorum repository.

---

**Structuring the policies**

**Some hints**

**Process suggestions**

- Work in groups – same country, same sector – if possible
- Consider the **actors** in your sector/country
- Consider the **existing policies** in your sector/country
Sector actors

- Ministry – or ministries
- Funding councils
- Quality agencies (are they in ENQA?)
- Grant and/or loan scheme operators
- Associations of providers – and sub-sectors
- Unions
- Staff associations
- Student associations...

Existing policies

- Policy documents for sector
- Policies for IT or ICT
- Policies for e-learning
- Policies for lifelong learning
- Policies for distance learning
- Policies for flexible learning
- Policies for open access
- Policies for international

- Old policies
- KPIs, Measures or Indicators
- Benchmark results
- Policies of institutions/groups who dominate the sector or have specialist roles (e.g. OUs)
A useful framing – MIT90s

Now you think about it

- Funding
- Purpose/projects
- Costs and business case
- Licenses
- Accreditation of prior learning
- Quality
- Staff development
- Further research
- Local aspects – languages, culture, inclusion, rural etc
**Over to you**

But we will be here to help

*Paul and Giles*

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**4 Events in Scotland and Wales**

Although separate events in Scotland and Wales do not form part of the series of full national workshops, they are worth recording here, as education policy is devolved to the home nations in the UK.

**4.1 Scotland**

Two *Open Scotland* events were attended, in June 2013 and June 2014. The first of these was the *Open Scotland* summit, which launched the Open Scotland Declaration⁵; by the time of the second event, the Declaration had received substantial comment and support, and a senior civil servant from the Scottish Government attended⁶.

**4.2 Wales**

Two webinars were held in Wales, in May 2013 and June 2014, at events supporting the Wales declaration of intent⁷. Details of these are given in D5.6.2 and D5.6.3, together with the presentations at both events.

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⁶ [https://www.alt.ac.uk/civicrm/event/info?reset=1&id=106](https://www.alt.ac.uk/civicrm/event/info?reset=1&id=106)
⁷ [http://www.oerwales.ac.uk/about/](http://www.oerwales.ac.uk/about/)
5. Conclusions

Conclusions from the Netherlands workshops have been summarized in a journal article - http://www.surf.nl/binaries/content/assets/surf/en/2014/article-strategic-workshops-open-education----lessons-learned-march-2014.pdf. The English text is reproduced below:

5.1 Supporting Open Education policy making by higher education institutions in the Netherlands: lessons learned from strategic workshops on open education

5.1.1 Introduction

Higher education in the Netherlands is known for its high quality and its international study environment. With more than 1800 international study programmes and courses, the Netherlands has the largest offering of English-taught programmes in continental Europe. Dutch higher education has a binary system, which means that students can choose between two types of education: (1) research-oriented education offered by research universities, and (2) higher professional education offered by universities of applied sciences. At a research university students tend to focus on research-oriented work, which can be in either an academic or a professional setting. At a university of applied sciences students can choose a professional programme in the applied arts and sciences, designed to prepare them for a specific career.

In 2002, the Netherlands introduced the Bachelor’s- Master’s degree structure. Both research universities and universities of applied sciences can award a Bachelor’s or a Master’s degree. After completion of a Master’s programme, graduates can start a PhD degree programme (third cycle).

In February 2013, SURF (the organisation for ICT collaboration in higher education and research) announced that it planned to organise ten strategic workshops to support higher education institutions in developing their vision and policy on open and online education. Within one month, ten higher education institutions had registered. Their interest was not entirely unexpected – a study commissioned in the previous year by SURF and Wikiwijs on the state of affairs regarding Open Educational Resources (OER) in Dutch higher education revealed that 42 per cent of institutions were in the process of developing an OER vision or policy (SURF, 2012). In the study, the institutions stated that they would appreciate help in forming their policies.

Over a quarter of higher education institutions that took part in the aforementioned study possess OER collections. When the study was conducted, more and more institutions were making their learning materials publicly available for use and re-use, led by the Open University and Delft University of Technology. Medical research and ‘green research’ were also large contributors in this area. Developers of independent Massive Open Online Courses (MOOCs) in 2013 included Leiden University, Delft University of Technology and the University of Amsterdam.

The SURF Open Education Special Interest Group (SIG) and SURF itself decided to create tailor-made strategic workshops to meet the needs of the institutions. Participants were selected on a ‘first-come-first-served’ basis. Over the course of 2013, workshops were held at three universities (Erasmus University Rotterdam, VU
University Amsterdam and Tilburg University), two university hospitals (Radboud UMC and the Academic Medical Centre) and four universities of applied sciences (Avans, Fontys, Windesheim and Saxion). A fifth participating university of applied science decided that the initial assessment interview was enough for it to make a start on its own.

This article describes how the workshops were created, as well as the new insights that came out of them. It gives an overview of the opportunities, challenges, strategic issues and questions that arose during the workshops. We will discuss our lessons learned, as well as the follow-ups and opportunities that the Dutch approach may offer to others.

### 5.1.2 Structure of the Strategic Workshops

By creating the workshops, SURF and the Open Education SIG aimed to assist participating higher education institutions in developing their vision or policy regarding open and online education (Schuer et al., 2013). A second goal of the workshops focused on the sharing of knowledge and expertise.

The strategic workshops were held at various institutions, with a minimum of 10 and maximum of 45 participants. All workshops were coordinated and led by the same moderator, who was accompanied by a pool of moderators and speakers, mostly experts from the Open Education SIG.

By offering tailor-made workshops, SURF and the Open Education SIG attempted to tailor the content as closely as possible to the knowledge and needs present within the institution, in order to maximise the results achieved during a single morning/afternoon session. Institutions could choose between an informative workshop, one that assists with the formation of an opinion on open and online education, or a workshop aimed at the development of a concrete strategy. In practice, all workshops given turned out to be an amalgam of the first two types.

In order to foster the individual character of each workshop, the coordinator and one or more moderators held an assessment interview with each institution beforehand. During these interviews, the context of the strategic workshop was discussed through questions such as: What is the reason for wanting the workshop? What does the institution aim to achieve with the workshop? What is the participants’ current level of knowledge and experience when it comes to open and online education? What results do they have in mind?

The overall outline of a strategic workshop is as follows:
- Welcome by a member of the Executive Board, a Dean or director of education.
- Introduction by the coordinator.
- Plenary presentation (sometimes two or three) by speakers/guest speakers. Topic: what are Open Educational Resources, what is Open Education, and how can these influence higher education?
- Interactive brainstorming session in groups on a specific question. For example: What is the potential impact of open and online education on the institution itself? Or: What opportunities or possibilities can you envisage for the institution?
- Break
- Second brainstorming session on concrete lines of action. Is there any room for
experiments? What projects can be started?
- Conclusion with feedback on results, and agreements regarding follow-up.

5.1.3 Open Educational Resources, Open Courseware and MOOCs

All strategic workshops start by clearly defining the subject at hand. The following definitions and descriptions are discussed:

For years, open universities and institutions for distance education have been responding to the need for distance education and lifelong learning. The digital revolution has added to this open education an innovative, burgeoning world of OER, Open Courseware and Massive Open Online Courses. ‘Traditional’ Open Education is characterised by accessibility, i.e. a lack of admission requirements. Participants complete the course (or a full curriculum) at their own pace. Often there are no requirements for physical attendance or to start by a fixed date. Digital openness adds two special

Share and share alike - Fontys

‘Fontys has a great deal of expertise when it comes to open and online education. Small-scale experiments were also being carried out, however we still did not have any Fontys-wide policy’, explains Economics Information Manager Desirée van den Bergh from Fontys Universities of Applied Sciences. The aim of the Fontys strategic workshop was to investigate whether there is an institution-wide need for open and online education.

Fontys consists of thirty institutions that prepare students for a variety of careers. All these institutions work at their own pace on educational innovation, and with their own understanding of this field. Van den Bergh believes that the strength of the workshop lies in the diversity of the groups present: lecturers, directors, policymakers, information management staff, but also staff from support services such as Education and Research, IT and Marketing & Communication. ‘What we all had in common at the end of the workshop was the conviction that Open Education is developing fast, and that Fontys needs to get involved’, she says. ‘The strategic workshop also revealed that we find it important to share knowledge throughout Fontys on experiments that are currently underway, and to create an overview of what types of support are needed. Participants had different ideas on the added value for education. Are we going to use Open Education as a supplement to existing education, for remedial courses, for example? Or will entire curricula be offered this way in the future?’

As a result of the strategic workshop, the Education and Research Committee at Fontys was asked to devote attention to OE. Fontys also organised a follow-up meeting involving knowledge exchange on the experiments currently underway. During this meeting, others were asked whether they also wanted to participate in the experiments, and were
invited to indicate what types of support were required. The ideas generated at the meeting will be presented to the committee in late March.

Both the workshop and the follow-up meeting demonstrated the importance of fostering a culture of ‘share and share alike’. One Fontys institution, for example, is considering developing a MOOC or OER in the field of dance as part of a European project. The initiators received feedback on their questions from the expert present (Willem van Valkenburg from Delft University of Technology) as well as from colleagues. Van den Bergh: ‘The strategic workshop is extremely worthwhile for educational organisations wanting to get involved in the developments in Open Education. The workshop was run very professionally, which helped greatly to put the subject in the right context. We are looking forward to the next series of SURF activities on open and online education, and would be happy to contribute to their development.’ Aspects to this: many online learning materials are available for free, and may be freely edited through the use of open licensing. This means that anybody with Internet access can conduct informal private study, as well as edit and distribute learning materials.

Open Educational Resources (OER) are learning materials that are freely available for use and re-use online. The copying, editing and distribution of these materials is permitted (subject to certain conditions) through the use of an open licence, such as Creative Commons. Open Courseware (OCW) refers to a complete course using OER that have been released for use or re-use by a higher education institution. Massive Open Online Courses (MOOCs) are free online courses available to a very large number of simultaneous participants. Participants sign up, complete tests, are often supported by teachers, and receive a certificate of completion (sometimes subject to a fee).

OER and MOOCs do not qualify as Open Education in themselves – additional components are required first. Besides OER, (Mulder & Janssen, 2013) and (Mulder & Janssen, 2014) have identified four additional components, which together form the Five Components of Open Education (SCOE) model. On the supply side of education, they identify:

- (Open) Educational Resources (OER), or teaching materials;
- (Open) Learning Services (OLS); and
- (Open) Teaching Efforts (OTE).

On the demand side, they identify two components:

- Open to Learners’ Needs (OLN); and
- Open to Employability & Capabilities development (OEC), or expectations from the social environment.

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**Low-hangingfruit-RadboudUMC**

The strategic workshop at Radboud UMC was attended not only by
members from the medical degree programme, but also from the institution for nursing and paramedics, in order to generate a joint strategy on OER. Senior policy officer Nicolai van der Woert from the Educational Innovation Office at the Radboud Health Care Academy (Zorgacademie) described the situation as a ‘unique event’ in the history of the Radboud UMC. Those present included students, lecturers, policy officers and directors of education. ‘The discussion surrounding open and online education is often riddled with misconceptions’, says Van der Woert. ‘That is why the strategic workshop is so useful. It’s also nice that it is organised by an external party, which helps to promote an objective discussion.’

The differences in the approach to open and online education between the two institutions were clear. ‘This year saw the beginning of a curriculum review for the medical degree programme’, Van der Woert explains. ‘All decisions related to open and online education and OER need to be in line with the revisions.’ No new policy on open and online education was therefore being developed for doctors currently in training. The nursing and paramedics institute did decide to create policy. However, both target groups decided to go for the ‘low-hanging fruit’ first.

As a result of the workshop, the use of OER in the medical degree programme has been incorporated into the curriculum review. It has been included in documents stating the guiding principles, and projects will be initiated in which OER will be used by lecturers. The nursing and paramedics institute decided to work in the opposite direction, and chose to share a successful project on restricted and high-risk procedures with the rest of the Netherlands in the form of an OER. In addition to an Open Educational Resource, it has also become an Open Policy Resource, including guidelines for implementation. The institute has also set out to create an interactive iBook for the Basic Life Support course. Key lessons for students resulting from operating room simulations have also been collated, forming the basis for a second iBook including OER.

Van der Woert believes that a follow-up to the workshop is an absolute must. ‘After the workshop, the trick now is learning how to keep the fire burning,’ he says. ‘Open Education places great demands on institutions. For example, we have noticed that we cannot do without adequate support for teaching staff. The issue of the new role of libraries and publishers has also been raised for discussion.’

At the Netherlands Association for Medical Education (NVMO) congress, the Radboud UMC ran a round-table discussion on the role of libraries and publishers in open and online education. Van der Woert: ‘In contrast to reports about educational publishers in other sectors, in our experience medical publishers are only too happy to enter into a dialogue about their changing role. Medical libraries, too, understand how indispensable their part is in the support process.’
Opportunities

The Openness is not a doctrine, but a choice. With the 5COE model in hand, an institution can determine its own desired level of openness. For example, institutions may decide to open up their education in order to cater for the diversity in attributes, circumstances and needs of its target groups.

5.1.4 What did the Strategic Workshops achieve?

Of the nine participating institutions in 2013, eight decided on a programme focusing on opinion-forming. The participants identified threats and opportunities presented by open and online education at their own institutions, after which they drew up an initial list of projects to get started with. A brief summary is given below of the insights that came out of the strategic workshops.

Opportunities offered by online education, as identified during the workshops

Participants in the strategic workshops see OER and OE as instruments that can be used to improve the quality of both teaching materials and education in general. Open and online education can contribute to innovation in education. A term often used is that of the flipped classroom, or making teaching materials available online beforehand (such as lectures), freeing up more room during class time for in-depth exploration, group assignments and personal guidance.

According to workshop participants, open and online education also promotes flexibility within programmes. If there are no lectures/tutorials, students can use OER to explore the topic independently. It is also an instrument capable of broadening the scope of education, e.g. by directing students to interesting additional materials available online.

In economic terms, participants expect that after an initial investment, OE may help to reduce costs. The internal and external sharing of teaching materials saves money. Institutions of higher professional education (HBO) in particular propose that it is better to make use of knowledge within the organisation, among students and in the region by means of open and online education.

Open and online education also offers strategic benefits. MOOCs can help to boost the regional, national and international visibility of higher education institutions, a promotional opportunity often focused on by research universities in particular.

Threats posed by online education, as identified during the workshops

The fact of open and online education as a key influencing factor is irrevocable, and it is up to institutions to formulate a response. Participants concluded that the lack of an institution’s own vision on this development can produce undesirable consequences. Open and online education is not an independent phenomenon in and of itself that can be responded to with ad hoc decisions. Institutions that fail to include it as part of their educational strategy risk being outpaced by developments.

Increased visibility also increases vulnerability. Many institutions indicate that staff are sometimes not ready to expose themselves to the outside world. Lecturers value the authoritative status they possess within the walls of the classroom. The cultural shift required to become (and aspire to be) more visible to the outside world was raised as an important issue in nearly all workshops. Some internal resistance is also evident in the occasional remark that open and online education is not part of the institution’s job.
Universities of applied sciences fear losing their regional identity if the trends surrounding OER and MOOCs continue. If new competitors enter their territory, they run the risk of losing their unique position in the region.

Some workshop participants mentioned potential problems with accreditation. Is it really possible to allocate course credits for taking MOOCs? How are Open Education contact hours calculated, and how to measure aspects such as quality? Reservations with respect to the financial aspects were also expressed, not infrequently, during the workshops. How can the initial investment actually pay for itself? What is the revenue model? Institutions wonder whether they can actually carve out a niche for themselves among the enormous quantity of available MOOCs.

**Open Education: gaining experience**

Practically all participants agreed that we learn most by doing. This is can be achieved by either by starting up small projects or experiments, or by encouraging lecturers to take MOOCs and use OER themselves. This is the fastest way to discover what it is, how it works and how useful it is. Hybrid teaching methods, such as the flipped classroom, lend themselves well to experimentation with, and dialogue about, open and online education.

Lecturers can also take on a new role as content curators. Students want to be certain that OER are relevant, and that what they are learning is what they later need to reproduce. It is important to encourage lecturers to voice their approval of the learning materials.

The sharing of learning materials turns out to be far from standard practice within institutions, which may be a good point to start working with OE. There is a trend among higher professional education institutions to set up ‘bodies of knowledge’ for the first two years of study, to which OER would form a fitting addition. Remedial courses, transition programmes and some standard subjects also lend themselves to this purpose. All higher education institutions should aim to achieve further alignment with the professional field on the development, use and re-use of OER.

Both university medical centres and higher professional education share the desire to jointly improve the quality of research skills through open and online education.

Management bodies are urgently advised to facilitate such experiments not only financially, but also in terms of organisation, technology and legal support.

**5.1.5 Open Education: developing vision and policy**

Based on the insights gained during the workshops, below we offer a number of recommendations to higher education institutions wishing to develop a vision or policy on open and online education.

A conclusion often drawn during the strategic workshops is that higher education institutions must take both a bottom-up and a top-down approach to open and online education. Experiments both in and outside the classroom are useful in order to gain experience and explore the possibilities offered by
OER. However, experiments alone are insufficient if there is no context being created in which to implement and record the results. To create a vision and policy on OER, institutions must ask themselves a number of questions. For example: Why and to what extent do we wish to participate? What are the priorities? How is open and online education related to other topics on our educational agenda? How will OER help to strengthen our ‘core business’? What resources do we need? And so on.

‘Open’ as an ice-breaker - Erasmus University Rotterdam

‘The strategic workshop was a good point of departure for getting the subject of open and online education onto the agenda at Erasmus University Rotterdam’, says Gerard Baars, director of the EUR Risbo research institute. ‘In recent years our focus has been mainly on improving study success. The workshop had nearly forty participants, including representatives from all EUR faculties and support services, who learned a lot about the current developments in the field of open online education.’

Another aim of the workshop, in addition to providing information, was to generate a list of ideas on open and online education among stakeholders at EUR and to generate discussion. The ideas among the various target groups turned out to correspond in many respects.

‘EUR needs to do something with open and online education. There are opportunities available such as attracting new target groups, especially international students and course participants for postgraduate programmes’, summarises Baars.

The workshop was one of the building blocks that led to a draft policy document describing the multi-year plan for EUR. Although the document still needs to be evaluated by various bodies, the plan is expected to go ahead. EUR is taking an approach that includes more than just open online education, however. Over the next two years, the entire university will be experimenting with the opportunities offered by online learning, in both undergraduate and post-experience programmes.

1. The university wishes to use online education to ease students’ transition into academic education at the pre-programme stage. This is possible, for example, using an online transition module designed to ‘brush up’ on any skills or knowledge that may be lacking.

2. A second objective concerns improvements to campus-based education. By running part of a subject online, or including effective third-party open and online teaching materials and ensuring that the contact hours contain high-quality content, flipping the classroom can lead to improvements in the quality of on-campus education.

3. Pilot projects will be carried out, involving open online education (e.g. MOOCs) and preferably interdisciplinary collaboration with strategic partners, e.g. as part of the Leiden-Delft-Erasmus (LDE) alliance. All pilot projects will be closely scrutinised in terms of, for example, quality and scalability before being given the green light.

An evaluation of the EUR online learning programme will be carried out in two years’ time, after which more precise choices may be made for the the 2016-2018 period.

Baars: ‘The focus of the strategic workshop was very much on the “open” aspect.'
This is not our only objective, but it did serve as a good ice-breaker within EUR, and certainly got the discussion going.’

The workshops have shown that the professionalisation of lecturers in the field of open and online education is crucial. Lecturers must be aware of the added value of open and online education, have a sound knowledge of what it entails and know how to put it into practice. This professionalisation process does not happen automatically, but needs to be instigated by the institution.

**Innovation**

For many higher education institutions, MOOCs form the catalyst that spark the discussion on open and online education. It is no surprise, therefore, that they are a main focus during the strategic workshops. Many academic institutions consider developing a MOOC prior to the strategic workshops, in order to attract outstanding international students, PhD candidates and staff. However, because the workshops present a much broader picture of the possibilities offered by open and online education (e.g. for their own teaching activities), their views on MOOCs change and MOOCs become only one of the ways of opening up education. The general conclusion from the workshops is that if an institution wishes to create its own MOOC, it must know exactly why. A proven method when offering MOOCs or other forms of open and online education is to begin with the ‘jewels’ in the institution’s crown. Start with the people and subjects that the institution wishes to put on display.

The speakers warn that innovation through open and online education costs both time and money. Institutions wanting to make a serious start will need to free up funds and staff. A cultural shift is also necessary, and is usually the greatest challenge in any organisational change. The shift relates not only to the professionalisation of teaching staff, but also to striking a balance between open, online and campus-based education so that these three components support and benefit one another.

Open and online education provides opportunities for collaboration between institutions, e.g. in matters involving remedial courses (courses that students need to pass in order to take another course) and transitional programmes. Higher professional education institutions and the medical field note that students’ research skills often leave much to be desired. This represents an opportunity for the joint development of high-quality OER. During the workshops, participants became aware that going in search of ‘low-hanging fruit’ together offers many benefits. The Radboud UMC institute for nursing and paramedics, for example, decided to make the results of an existing, successful project available to all other nursing programmes as an Open Educational Resource (see box).

**Well-considered choices**

Making education open (or more open) is an evolving trend: it is not entirely clear where it will take us. It is clear, however, that it is a process of exploration with great potential that is already well beyond the small-scale experimental stage. The participating institutions are aware of this fact – a vision on open and online education is now indispensable. The choice not to participate must also be well-considered, and based on an evaluation of the potential consequences.

Institutions that come to the strategic workshops with the idea of making an international name for themselves via a MOOC soon expand their horizons to include open and online education in its broader sense. They conclude that other forms of
open and online education may be just as important to their own teaching activities as MOOCs. Participants also gradually discover that making education open does not mean creating everything yourself, but that it can also include the re-use of OER from elsewhere for the institution’s own purposes.

Facilitating experiments
Educational institutions starting out with open and online education would do well to reserve a large enough budget and to deploy enthusiastic staff. They should also expect to face many obstacles, and they need funding: OE is not just an ancillary add-on. One question that institutions should ask themselves is whether the initial experiments are scalable. Exceptions, after all, are difficult to generalise. To assist lecturers in their professionalisation process, institutions must organise support for the pedagogical, legal and technological issues associated with searching for and publishing OER.

5.1.6 Lessons learned
SURF and the Open Education SIG conclude that the structure chosen for the strategic workshops is an effective one. An extended assessment interview as the basis for a tailor-made programme embedded within a fixed process framework has proved to be efficient. The importance of a thorough assessment interview is highlighted by the fact that the institutions all have different motives when registering for the workshops. It is essential to gain a clear idea of why an institution wishes to participate, as well as of who placed the issue on the institution’s agenda. For example, is the motivation for developing a vision or policy on open and online education coming from above, from an ICT advisory body, a faculty, or a group of individuals?

One key to the success of the workshop is to ensure that various sections of the institution are represented. Additional value is created when the Executive Board, middle management, policy staff, support services staff, lecturers and students are all present, as was the case with Fontys (see box). Attendance by board members is a sign that the institution genuinely values OE. The various stakeholders also approach the subject with a range of perspectives that must be explicitly stated and analysed during the workshop. One common observation is that the various standpoints result in ‘eye-openers’ among the participants.

Neutral agenda
The formula for the strategic workshops demands a high level of neutrality from the organising party, as the institutions are giving each other a glimpse into the heart of their strategy. Entrusting the organisation of the event to an umbrella organisation (SURF, in the case of the Netherlands) ensures that neutrality is guaranteed. The agenda and objectives of the workshop must also be clear and self-evident at the institutional level. Compulsory attendance or scheduling within some other event (such as a conference) does not result in the same degree of pro-activeness that characterises most workshops.

Positive
One noteworthy aspect of the strategic workshops is the positive attitude of all attendees. The institutions are motivated to take part from a need to do ‘something’
with open and online education. The experts attend in the knowledge that they have a valuable contribution to share. The core members of the Open Education SIG voluntarily shoulder the task of moderating the workshops in turn. All attendees share the conviction that the session is of great value to their work.

5.1.7 Conclusion and follow-up

SURF and the Open Education SIG deem the strategic workshops a success, due to the enthusiastic responses and participants’ clear willingness to openly share their knowledge and experiences. The participating institutions have attested to the usefulness of the workshops in converting broad ideas (‘we need to do something with open and online education’) into concrete projects and/or providing the initial impetus for forming a vision on open and online education.

In 2014, SURF will offer a follow-up to the strategic workshops. In addition to new workshops for institutions wishing to get started with open and online education, we are also considering follow-up activities aimed at the current cohort. During the workshops, higher education institutions frequently ask whether they can receive support if they continue on this route. Given the diversity in the plans of the participants (ranging from pilot projects to policymaking), any such assistance will need to take various forms.