

EXPLAINING THE PARADOX:
PERCEIVED INSTRUCTOR BENEFITS AND COSTS OF CONTRIBUTING TO
MASSACHUSETTS INSTITUTE OF TECHNOLOGY OPENCOURSEWARE

by

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ABSTRACT

Explaining the Paradox:
Perceived Instructor Benefits and Costs of Contributing to
Massachusetts Institute of Technology OpenCourseWare

by

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This study examines perceived benefits and costs of instructors who contributed to the Massachusetts Institute of Technology (MIT) OpenCourseWare (OCW) project. While previous research has investigated the benefits and costs of OCW from the perspectives of the users and institution, the instructor's perspective is the focus of this qualitative case study. Instructors created the original educational content and would seem to have the most to lose by contributing to OCW.

Data come from six years worth of surveys conducted by the evaluation team of the MIT OCW project, follow-up interviews with contributing MIT instructors, and a content analysis of written feedback comments received by the MIT OCW team. Findings include instructor benefits of: (1) improved reputation, (2) networking, (3) supplementary opportunities, (4) improved course content, (5) course feedback, (6)

students accessing materials, and (7) working with the MIT OCW team; and instructor costs of: (1) damaged reputation, (2) loss of intellectual property rights, (3) requirement of extra resources, (4) realignment of individual professional goals, (5) public materials, and (6) working with the MIT OCW team.

(223 pages)

PUBLIC ABSTRACT

Explaining the Paradox:

Perceived Instructor Benefits and Costs of Contributing to Massachusetts Institute of Technology OpenCourseWare

The Massachusetts Institute of Technology (MIT) OpenCourseWare (OCW) project offers potential benefits and costs to three main categories of people: users, the institute itself, and the instructors who provided the materials to the project. Little is known about the benefits and costs of the instructors, so that is what this study examines. Instructors put together the original educational materials and would seem to have the most to lose by contributing to OCW.

It appears that instructors recognize benefits of: (1) improved reputation, (2) networking, (3) supplementary opportunities, (4) improved course content, (5) course feedback, (6) students accessing materials, and (7) working with the MIT OCW team; and costs of: (1) damaged reputation, (2) loss of intellectual property rights, (3) requirement of extra resources, (4) realignment of individual professional goals, (5) public materials, and (6) working with the MIT OCW team.

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CHAPTER 1

INTRODUCTION

In 2002, the Massachusetts Institute of Technology (MIT) launched what has become a global movement of open educational resources (Vest, 2006). Though many educational institutions have launched similar initiatives, MIT's project, OpenCourseWare, is still the most well-known OpenCourseWare project to date, visited over 1.2 million times per month by individuals from around the world (Vest, 2004).

This paper presents a study which examined the perceived benefits and costs that come to instructors who contribute to MIT's OpenCourseWare (OCW) project. First, the study's background is presented, followed by the seeming paradox of contribution based on the costs versus the benefits to instructors. Second, in Chapter 2, the case background is presented, which includes a discussion on open educational resources and MIT OCW, a description of MIT instructors, a discussion on potential general benefits and costs of MIT OCW, and a description of the instructor costs and benefits. Third, in Chapter 3, the study's qualitative case study methodology is discussed, including a discussion regarding the pilot study, data collection, and data analysis. Fourth, in Chapter 4, the findings are presented regarding the perceived instructor benefits and costs. And, finally, in Chapter 5, a discussion of the perceived instructor benefits and costs is presented.

Study Background

Many wondered how MIT would overcome the seeming paradox of having instructors, who traditionally (1) protect their creative works, (2) are short on time, and (3) believe their classrooms are a private place, contribute to a project which would require (1) licensing their materials in an unfamiliar way; (2) more of their time; and (3) publicly publishing their works, inviting review, criticism, and scrutiny. These three categories of seeming paradoxes will be discussed under *Open Publishing*, *Instructor Time*, and *Increased Review*.

Open Publishing

The MIT OCW project (<http://ocw.mit.edu>) built on the foundation established by the open content movements of “free software” and “open source” which supported the publishing of digital works in ways that were free (as in “free speech,” not as in “free beer”) (Stallman, 2004) and open (as in “open access”) (Hamerly, Paquin, & Walton, 1999) where a creative and novel approach to copyright licensing was adopted. Instead of choosing the traditional “opt-out” copyright mentality of the late Twentieth Century (Lessig, 2006), contributing instructors to MIT OCW adopted an open license approach. Instead of selecting a mentality where content producers automatically retained (or reserved) all rights to duplicate, distribute, exhibit, and alter their works (Parker, 2007; Zia, 2001) (unless they license these rights on a case-by-case basis), contributing MIT OCW instructors chose to grant certain permissions ahead of time for others to download, copy, distribute, alter, and/or use materials. These permissions are granted so long as,

depending on the license chosen, the users of the materials: (1) give attribution back to the original author, (2) do not commercialize the content, and/or (3) offer their content which makes use of MIT OCW content in an open format as well (Fitzgerald, 2006; Gandel & Wheeler, 2005; Liang, 2005; Moody, 2006; Newmarch, 2000; Weeramuni & Carson, 2006).

Therefore, instead of negotiating permissions to use content by licensing on a case by case basis (usually in exchange for compensation) MIT instructors agreed to a copyright license where they did not know what their compensation (if anything) would be for giving up certain rights. Moreover, giving away these rights ahead of time could also jeopardize the marketability and commercialization of their course content. What publisher would want to produce a book which only contains content that anyone could already download for free? If someone puts their time, talents, and money into producing copyrightable content, such as educational content, why would they release their copyrights ahead of time without negotiating compensation?

Instructor Time

For instructors to contribute their materials for use in MIT OCW, they must take extra steps, which involves additional time.

Even though the materials will be covered by an open license, they need to be reviewed to determine who holds the copyright. Only the copyright holder can release rights which allow their works to be publicly available and usable. It takes time for instructors to review their works to determine which are theirs alone; which involved other peoples' works; and which are used under an educational Fair Use claim, which

means the use of another's work is allowable because it is for educational purposes and contained within a classroom or a password-protected online setting.

If a work was even partially created by another person, that other person must be identified, must be located, and must agree to the open use, which may involve explaining what the use is; all three activities involve time for the MIT OCW contributing instructor. If content is used under an educational Fair Use claim, instructors must find alternate solutions when using that same content under an open license. If they cannot identify, locate, and reach a use agreement with the original creators of the content, they have to remove the content, replace the content with comparable substitutes, and/or recreate the content; again, all three activities involve time for the MIT OCW contributing instructor.

In addition to copyright concerns, some of the MIT OCW materials would need to be adapted for online use, which also takes time. Videos, papers, and pictures might need to be digitized. Descriptions of the content, including metadata descriptors which make the content easier to locate, need to be added by those familiar with the content, but this is costly in time and effort (Duval, Hodgins, Sutton, & Weibel, 2002; Lagoze, Krafft, Payette, & Jesuroga, 2005; Mathes, 2004; Greenberg, Pattuelli, Parsia, & Robertson, 2001; Vander Wal, 2007).

When considering this added time and energy required, why would MIT instructors be willing to invest any time at all in contributing to MIT OCW?

Increased Review

When instructors put their materials in MIT OCW, they are inviting the world to look through their works. This goes against the traditional approach where instructors enjoy a closed-classroom, with only those involved in the course receiving copies of the materials. Instructors normally do not invite feedback from just anyone, especially from their peers. However, in an open environment, anyone can critique and scrutinize their works. With increased viewing also comes a perception of greater availability and accessibility.

Why would instructors seem to invite additional communication regarding their materials, when their time is already stretched thin? Why would instructors choose to subject their works to increased review, exposing their materials to the criticism and scrutiny of the world?

The Paradox of OCW

With these apparent costs of contributing to MIT OCW, why would instructors be involved? Why would they be interested in essentially giving away their creations, forgoing the standard copyright approach? Why would they risk the marketability and commercialization of their course content? Why would instructors be willing to put in any extra time? Why would they make their course content openly available for anyone to review?

Because contributing is largely voluntary, instructors must feel that contribution to MIT OCW brings them benefits which outweigh the costs of contributing.

Purpose

This study reviewed an existing case, namely Massachusetts Institute of Technology's OpenCourseWare (MIT OCW) project, in an attempt to identify and describe the reasons instructors contribute to the project. It was hoped that by understanding the benefits and costs for contributing, open dissemination opportunities might become more understood.

Operational Definitions

Benefits: Positives, pluses, drivers, pros, motives, solutions, and incentives.

Costs: Negatives, drawbacks, barriers, cons, inhibitors, problems, and disincentives.

Instructor: Instructor on record for a particular course's content. This could be an emeritus/a faculty member, a current faculty member, or an adjunct instructor.

Contribute/Contributing/Contribution: Providing materials for use in OpenCourseWare. Publishing materials to OpenCourseWare.

Participate/Participating/Participation: Being involved in OpenCourseWare after contributing, including responding to emails and taking part in surveys and interviews regarding OpenCourseWare. Perhaps even being available and active in the ongoing use of OpenCourseWare.

OpenCourseWare: Freely and openly available, stand-alone, college-level online materials, which are housed under a single umbrella.

Materials: Works used for educational, course, or teaching purposes, including lecture notes, videos, reading lists, course assignments, syllabi, calendars, graphics, study items, tests, samples of student creations, and online simulations. These are whole complete productions.

Content: Works that can be in hard-copy form, digital form, open format, educational, or course, among other types. These can be pieces of a larger whole, like an image used in a paper.

Work: In general terms, a copyrightable production by an writer, author, or artist. In specific terms, it is a piece of material created by an instructor.

Creation: Work, as in something someone created.

CHAPTER 2

CASE BACKGROUND

Massachusetts Institute of Technology OpenCourseWare (MIT OCW) built upon existing thinking about the specific benefits to openly sharing digital software. These include: a pure pleasure of creating; altruism; a desire for increasing knowledge and improving a creation; a need to fix an immediate problem; increasing reputation; a sense of collective disdain towards commercial software producers in general; and even monetary compensation (people can consult, provide customer service, or produce a sellable product) (Benkler, 2002; Lerner & Tirole, 2002). Indeed, some believe that having many people accessing open source software is the only way to efficiently achieve the highest quality product (Benkler, 2002; Hamerly et al., 1999; Raymond, 2001; Stallman, 2004). The idea is that if digital content is open (employing specific licenses such as the Creative Commons Licenses or the GNU Free Documentation or General Public Licensing), other people will be able to improve upon it over and over until a product of far better value is achieved—far better than one person alone could have achieved.

MIT OCW was established on the belief that these benefits extended beyond digital source code production to general open content production. MIT educators believed that their content should be disseminated widely and improved upon. The belief was that by offering educational content in an open format, people would be free to use and improve upon others' works. One goal was to make quality higher education

materials more accessible to an increased number of people, especially to those in less advantaged parts of the world, to be used for teaching and learning (Carson, 2004).

It is recognized that changes to how people think of educational resources will have to be made for the benefits to be realized. As two Open Educational Resource leaders, Smith and Casserly (2006), put it:

We are unabashed advocates of open educational resources, but we are concerned about the future. Issues of sustainability; the tradition of institutions, colleges and universities included, to protect their content from all but the elite; and the strains of anti-intellectualism and protectionism that run deep in parts of the world all threaten the open spread of knowledge. These threats can only be offset by the enthusiasm, imagination, and commitment to open knowledge that we see in people as we travel throughout the world.

Open Educational Resources and MIT OCW

There is not one standard definition of open educational resources. They tend to include digitized materials offered openly for educators, students, and self-learners to use, such as: learning objects like lecture material, readings, simulations, experiments, and demonstrations, as well as syllabi, curricula, and teachers' guides (Wiley, 2006); but they can also include tools, such as software and systems, and implementation resources, such as open licenses (Creative Commons licenses, etc.) (Trenin, 2007). In a general sense, open educational resources are openly-available materials resulting from a course of some kind. The Hewlett Foundation, a large supporter of the open educational resources

movement, states that they are “teaching, learning and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use or re-purposing by others. Open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials or techniques used to support access to knowledge” (The William and Flora Hewlett Foundation, 2007).

Therefore, MIT OCW is a type of open educational resource, one that focuses on the development and delivery of college-level materials that are openly available online. These include lecture notes, videos, reading lists, course assignments, syllabi, calendars, graphics, study items, tests, samples of student creations, and online simulations. Anyone wanting to use MIT OCW content does not need to sign up, register, or log in. As mentioned earlier, the content is accessible at no cost and available to use provided the requirements of the open licensing are met (Educause Learning, 2006; Kirkpatrick, 2006; Vest, 2004).

MIT Instructors

It is important to note that MIT OCW instructors were the first to be approached with the OCW concept. The MIT OCW team developed protocols and plans in approaching instructors in order to not only have the best outcomes in agreeing to contribute, but to also adhere to policies and overall missions of MIT. The funding provided for the first instructors who contributed to receive a small compensation for agreeing to be the early adopters.

After a time, the institution recognized there was a potential value in having its instructors contribute to MIT OCW. It made the decision to strongly encourage instructors to contribute. Some instructors even would go so far as to say they were coerced into contributing.

The instructors at MIT tend to view themselves and be viewed by others as highly-skilled in their respective fields. In many ways they are among the top experts in academia. As such, they are a unique set of individuals to identify and use for a research.

Potential General Benefits of MIT OCW

Open educational resources, including MIT OCW, have different potential general benefits depending on who the audience is. There are three categories of those who could benefit: institutions housing the content (government, for-profit, non-profit, or educational), users of the content (other institutions, teachers, instructors, or students), and those contributing the content (teachers, instructors, professors, or faculty members).

Institutions housing the content can benefit by establishing a longer-term focus on reusability. They can also benefit by raising the visibility and reputation of the institution, perhaps even allowing for a higher return on investment of tax dollars and enriching the size, quality, and use of resources. More people can have access to the content provided by an institution. Users of the content can benefit by having access to a broader range of subjects, permitting options not only in topics, but also permitting re-use of the resources, encouraging improvements, building or strengthening learning communities, and promoting user-centered approaches (Open eLearning, 2007). In other

words the access to higher quality content can be the outcome. And, those contributing the content can benefit by having their name out there, allowing others to cite their work or add feedback. They can network with one another on similar topics which can lead to collaborations that may not have occurred otherwise (Johnstone, 2005). They can benefit from the institutional benefits such as raised reputation or higher return on investment. And, some instructors also want a way of leaving a lasting legacy after their retirement from academia.

In a February 2007 report to the William and Flora Hewlett Foundation, Atkins, Brown, and Hammond (2007) mentioned potential general benefits of MIT OCW including *reuse of materials* and *increased accessibility*.

Reuse of Materials

A potential benefit is the ability to reuse MIT OCW content. *Reuse* is the utilization of previously existing content to ultimately create something new (Frakes & Terry, 1996; Summer & Dawe, 2001). MIT OCW has a distinct ideology when it comes to reuse, including the licensing and protection of content. It is recognized that reuse is a *potential* benefit even though some research suggests it is not a realized benefit (Duncan, 2009). The ideology simply makes reuse easier and more possible.

Traditionally, the approaches of protecting copyrights included investing time, resources, and research into improving watermarking, data encryption, password protection, captioning, restricting extraction, digital signatures, and regulatory advances (Gage, 1995; Mintzer, Lotspiech, & Morimoto, 1997). By doing these things, the claims were that ownership of the content is conveyed and “cheaper, better, and more freely

available entertainment and educational materials” would be the outcome (Mintzer et al., 1997, p. 12). This is at odds with the MIT OCW approach, which makes the exact same claims, but seeks to accomplish them by handling copyright protection in an opposite manner. MIT OCW looks to how open licensing can be best employed to spread the content more freely, efficiently, and effectively (Carson, 2004). For doing the same activities that are encouraged in MIT OCW (copying, distributing, and altering content), people using content in other online sites are referred to as “the malicious party,” “unauthorized persons,” “miscreants,” “adversaries,” “hackers,” and “nefarious” individuals (Mintzer et al., 1997). This makes the benefit of educational content reuse very different in MIT OCW.

One goal of MIT OCW is to provide content that can be altered, because the belief is that the more people that are participating—finding and fixing flaws—and adding to the content, the better it will become (Cole, 2006). Basically, anyone who thinks they have something to add to the materials is encouraged to do so, even though there is no systematic way to post changes directly to MIT OCW. A potentially unlimited number of individuals could be altering the content, through no formal editing process, with the time it takes to make revisions measured in minutes not weeks (Rominger & Stacey, 2006).

This is in contrast to traditional methods of content alteration, even when the materials are digital: suggestions are made for alterations; authors assimilate and analyze these suggestions; they add them to a new edition of the content; editors, publishers, and peers review the changes; and, finally, the new version of the content is published.

Granted, this process tends to add validity, credibility, and quality to the content, because it is formally edited and/or peer-reviewed. However, the time it takes to get these alterations to the user can often be measured in months.

Thus, through MIT OCW reuse, there is the potential benefit of better content developed quicker than when compared to traditional methods. However, since MIT OCW is meant to reflect how things are taught at MIT, alterations to and derivative works of the original content rarely make it back to the official MIT OCW content.

Increased Accessibility

By extension, the ability to reuse MIT OCW content opens the potential of adapting the materials to the specific needs of a given user. To be more readily available to those with different individual needs including language and cultural-type differences (Green, Jones, Pearson, & Gkatzidou, 2006; O’Conner, 2002) and global accessibility needs, initiatives and investigations to alter MIT OCW content are important. People utilizing MIT OCW are likely to be responsive to these needs because of the open licensing which facilitates the ability to adapt and improve upon the content (Martinez, 2002). Users can more easily interact with the educational content, and each other, to gain tacit knowledge of the materials (Cook & Brown, 1999; Lave & Wenger, 1991; Merrill, 2002)

Initiatives are already underway to translate MIT OCW content into other languages (Young, 2005) and to find new ways to use and adapt the content. One aspect of making MIT OCW content more usable by people in various lands is taking into consideration cultural norms that exist, especially as they translate into online interactions

(McCracken, 2006; Walsh, Gregory, Lake, & Gunawardena, 2003). The initiatives being undertaken in various nations (such as Spain, China, and Japan) are attempting to integrate cultural aspects into the reuse creations of MIT OCW content. And, though OCW is primarily in English, it has been translated into languages including Spanish, Portuguese, traditional Chinese, and simplified Chinese (Arendt, 2009; Kirkpatrick, 2006; Smith & Casserly, 2006; Vest, 2006). The express goal of having open digital educational content accessible to an increased number of people in the world, in many languages and cultures (Carson, 2004), is being realized.

Potential General Costs of MIT OCW

Just as there are three categories of those who could benefit from MIT OCW, there are three categories of those who bare the costs of MIT OCW: institutions housing the content, users of the content, and those contributing the content. Time and money to contribute, maintain, and update course content are the biggest potential costs. How an institution will pay for the personnel to keep servers going, for instance, must be considered. Or, who is paying for the equipment to clear the intellectual property, as well. The end user, to be able to even access the content, would have to cover costs of technology at the very least. Instructors are expected to parse out their content for what might not be educational Fair Use in a public online forum (but might be in a classroom), as well as bare any “trickle down” costs from the institution, such as loss of revenue.

Vest (2006) mentioned four fundamental issues that must be addressed if open source materials are to reach their full potential: cost, bandwidth, intellectual property

rights, and quality control. Accordingly, the Centre for Educational Research and Innovation identifies and describes what they call barriers for open educational resource usage: *technical barriers*, *economic barriers*, *social barriers*, and *legal barriers* (Hylén, 2007). To further encapsulate the four issues mentioned by Vest (2006), there would be another category of barriers which can be referred to as *content barriers*. The potential costs for open educational resources, including MIT OCW, would be whatever it takes to overcome these barriers.

Technical Barriers

Technical barriers cover the need to have access to certain technologies, including a computer, the technical knowledge how to use the hardware and software, and access to the Internet. These costs primarily affects the users and those contributing content.

Without these technologies, use of the OCW content requires obtaining it from others through reuse in printed copies. Or, if people only lacked Internet access, they could utilize localized digital copies. It is true that OCW content is being widely used offline (printed and digital) to secondary audiences: “18% of visitors distribute copies of OCW material to others; 46% of educators reuse content; of those, 30% give students printed copies, and 24% provide digital copies” (Carson, 2006, p. 2). But, this involves other costs (printing, distribution, etc.) and is not the primary nor most efficient use of OCW content.

Economic Barriers

Economic barriers involve funds to create, prepare, and maintain the OCW materials. There are real costs associated with the production, maintenance, and distribution of materials for open educational resources projects (Vest, 2006). They may be initial investments in hardware, software, and trained personnel; or costs associated with long-term sustainability (Caswell, Henson, Jensen, & Wiley, 2008; Downes, 2007). These costs primarily affect those contributing content and the institutions housing the content.

There are costs associated with preparing content for public availability, for example: clearing the content for intellectual property (see *Legal Barriers* below). Someone (typically those contributing content or the institution) has to go through the materials and identify which content may be in violation of national and international intellectual property laws. Permission to use this content must then be acquired, which typically involves a licensing fee, or this content must be removed, replaced with acceptable substitutes, or recreated.

All open education resource projects, including MIT OCW, must consider how their projects will be fiscally sustained, especially after start-up funds have been used up. Some scholars believe that long-term sustainability depends not on focusing primarily on monetary costs and final physical product, but on focusing attention toward what the user community wants and values, and on improving the content value for various user communities so the products and outcomes are worthy of sustaining (Dholakia, King, & Baraniuk, 2006).

Regarding how the costs of sustaining would be covered, Wiley (2007) summarized and added to the possible sustainability models presented by Dholakai et al. (2006) and Downes (2007) in categorizing thirteen not-necessarily mutually exclusive models: endowment model, membership model, donations model, conversion model, contributor-pay model, sponsorship model, institutional model, governmental model, replacement model, foundation model, segmentation model, voluntary support model, and reduced cost model.

No matter the model, someone, a group of people, or some organization covers the costs of sustainability. In the *endowment model* base funding is provided and the project is supported by the interest earned on that base funding. In the *membership model* interested organizations pay either seed money or annual subscription fees to have access to certain privileges. In the *donations model* a non-profit organization is set up which either manages or is assigned the materials and then seeks, and receives, donations from the larger community. In the *conversion model* the materials begin as being free, maybe for a trial period or at a lower quality, then once the user wants to have regular access to the higher quality materials, they must pay. In the *contributor-pay model* the providers of the materials pay for them to become—and remain—available to the public. In the *sponsorship model* advertisers and promoters pay for their names, logos, etc. to be displayed in some form along with the materials. In the *institutional model* an organization (usually the one who houses the materials) makes the costs of producing and maintaining the project part of the regular program (a “line item” in the regular budget). In the *governmental model* a governmental body of some kind (local, national, or multi-

national) assumes the costs of sustaining the project. In the *replacement* model the materials themselves take the place of other proprietary content management systems, so the money saved from not having to pay for the content management systems can be used to support the materials. In the *foundation model* the materials benefit an under-served user segment and thereby justify being supported by foundations, non-profit organizations, philanthropic institutions, professional societies, trade groups, firms, and/or governmental agencies. In the *segmentation model* support relies on users of the materials being willing to pay for the value-added to the materials (not just for the digital content itself). In the *voluntary support model* supporters of the materials donate their time and money to keep the project going, oftentimes focusing on fund-raising events. And, in the *reduced cost model* the cost for for the systems and procedures involved in creating and maintaining content is so low that it can be assumed by budgets and personnel already in place.

The William and Flora Hewlett Foundation has been a major player in the creating and maintaining of open educational resources, including of MIT OCW. It is estimated that this foundation has given a total of \$68 million in grants relating to open educational resources between years 2001 and 2006:

\$43 million has gone to the creation and dissemination of open content and \$25 million into reducing barriers, understanding, and/or stimulating use. Of the total, about \$12 million has gone to non-U.S. institutions primarily in Europe, Africa, and Asia for capacity building, translation, and/or stimulation of established institutions such as the Open University in the United Kingdom and Netherlands

so they will be more aggressive in providing open content. About half of the \$12 million has gone to enhance the ability of developing countries to take advantage of the open content and contribute to it. (Atkins et al., 2007)

Many of the open educational resources projects are funded by foundations and governments. However, foundations and governments are unlikely to sustain this support in the long run. In the United States, even though the Library of Congress, the Smithsonian Institution, the National Science Foundation, and other organizations are committed to continuation of many OER projects, it is recognized they cannot support all efforts. Thus, open educational resources projects are shifting to the other sustainability models to cover costs. The trend seems to be the adoption of models that use the projects to generate revenue such as through print sales and some sort of membership structure (Smith & Casserly, 2006).

Social Barriers

Social barriers include undeveloped or underdeveloped skills to use the available materials, resources that end up being context bound, lack of benefits for contributing to or using the resources, and social norms and traditions which encourage or discourage participation largely because of the potential of interacting with different groups. The costs to overcome these barriers primarily affect the users of and the institutions housing the content.

Open educational resources may be context bound. They may apply specifically to certain social situations, demographics, geographic locations, or learning environments (Arendt, 2009). For example, learning by doing and making mistakes may be considered

normal in some cultures while committing errors during the learning process is considered a negative in other cultures; just as engaging in teamwork during the learning process might be a regular occurrence in one culture, while it is considered academic dishonesty in another (Wiley, 2007). Another example is that certain content might include policies, regulations, and laws that only apply to a certain geographic region, so they could have little meaning for another region. And, some materials may have been prepared for a specific content management system, like Blackboard, so they do not function when removed from this digital environment.

Open eLearning Content Observatory Services (2007) has contended that the highest value of open educational resources can be achieved only if there are contexts for users, such as narratives that embed cultural objects in history and society, and avenues where people can relate objects to how they understand their history, identity and community. For MIT OCW to be successful, the practice of publishing materials to an accessible and open communication channel must become interwoven with social practices (Open eLearning, 2007; Smith & Casserly, 2006). The costs associated with overcoming these barriers need to be covered.

Legal Barriers

Legal barriers include copyright limitations and lack of clear policies or procedures (Trenin, 2007). A significant legal barrier in offering open educational resources is that of intellectual property, which includes copyright (Vest, 2006). These costs primarily affect those contributing content and the institutions housing the content.

When contributing materials instructors and institutions need to consider copyright issues, particularly if the instructor is not the creator of the materials. Many of the costs related to creating and offering open educational resources concern assuring intellectual property clearances have been addressed (Atkins et al., 2007; Smith & Casserly, 2006). Sometimes, it may not even be clear if the copyrights of the materials are held by the institution, the instructor, students, other originator, or a combination (Fitzgerald, 2006). This makes use of content even more costly. Therefore, tools that make the release of specific copyrights easier and less costly are increasing in use and popularity. The most used example is the Creative Commons Licensing, which has become utilized in many nations across the world.

Creative Commons Licensing allows creators to establish which rights apply to their works, instead of having materials automatically covered by all copyright limitations, by providing free, easy-to-use, flexible licenses for creators to place on their digital content (Fitzgerald, 2006; Smith & Casserly, 2006). Specifically, “Creative Commons provides free tools that let authors, scientists, artists, and educators easily mark their creative work with the freedoms they want it to carry. You can use CC to change your copyright terms from ‘All Rights Reserved’ to ‘Some Rights Reserved’” (Creative Commons, 2007). This helps lower the costs and legal issues involved in offering content freely online (Caswell et al., 2008).

A development from Creative Commons was ccLearn (<http://creativecommons.org/education>), launched in July of 2007, which focused specifically on open learning and open educational resources. It emphasized lowering

legal, technical, and social barriers. A primary goal of ccLearn was to build a comprehensive directory of open educational resources with the assistance of Google which encouraged locating and utilizing the content (Atkins et al., 2007; Bissell, 2007; Brantley, 2007).

Content Barriers

Content barriers include the question of quantity versus quality, ease of content use, and ease of locating materials. It takes resources to make and keep the quality high, to have the materials easy to use, and to build the systems and procedures to make locating the content easily possible. The costs of these resources affect those contributing content, content users, and the institutions housing the content.

As Vest (2006), the former President of MIT, noted, quality control could be a content barrier for open educational resources, particularly since oftentimes there are no formal peer reviews or publisher certifications. All there are is the instructor working with whomever is actually putting the content online. Conversely, it can be argued that there is more opportunity for quality control due to feedback and improvements by communities and networks who share the content (Open eLearning, 2007). A concern shared by instructors contributing materials is that their works would be misrepresented, resulting in a lower-quality product, and then also available for all to see (Parker, 2007). There is a cost involved in ensuring quality of content.

It is not enough to simply grow open educational resources, there also needs to be continued discussion and thought about its accessibility and its real and intended impact. For those interested in promoting the open educational resources, it is not enough to look

at ways to increase the number of initiatives. There is also a need to increase access to and the usefulness of existing resources (Trenin, 2007).

Open educational resources currently offer only limited constructive engagement with the content for the learners and only limited interaction with other users. Some argue that it may be better to focus instead on enhancing and promoting communities of interest around certain topics, where not only is there content, but mechanisms for communication and commentary (Open eLearning, 2007). By establishing such communities, the users can guide each other to supplementary content along with addressing possible questions and concerns.

Accessibility also involves users' abilities to locate desired and available materials. If potential learners are not able to locate or use the resources available they will serve little, if any, purpose for them. Metadata can be used to facilitate searching, but doing so appropriately takes time and therefore is costly, and if it is not appropriately done the content may remain undiscoverable (Kastens et al., 2005). As Trenin, (2007) stated, "adding metadata to a resource is time-consuming and faces the same problem software programmers do – the person adding metadata does not know the circumstances under which people will use the resource, *i.e.* the search for the resource may be done from a perspective totally different from what the person adding the metadata expected, so that it will be difficult or impossible to find the resource." The success of open educational resources relies on teachers and learners being able to find, determine the quality of, and utilize content from the available repositories (Open eLearning, 2007; Wojcickil, 2008).

Another aspect regarding content is the need to author various formats of the content: text, audio, video, etc. There cannot be an assumption that a user will be able to access all content formats, so an effort to offer as many formats as possible must be made, which increases cost of content production. Additionally, it may not necessarily be less costly to produce text than to produce audio or video, depending on how the digital content was originally created (Wiley, 2007). Creating PDFs, and text documents, and Flash Videos, and simulations, and MP3s, and presentation slides all have costs associated.

Understanding Instructor Benefits and Costs

For now, many content producers, including instructors, are apprehensive about open digital dissemination of their creations. One of the main reasons is that they see the costs, but do not understand the benefits that can come to them for doing so (Parker, 2007). This study is designed to raise an understanding of the benefits and costs of contributing to MIT OCW.

Benefits of MIT OCW have been investigated since the project began. Though the benefits to educational institutions and students have been studied (which may peripherally benefit the instructors) (Arendt, 2009), *there is little research on the benefits and costs to those who contributed the content—the instructors. The researcher in this study seeks to better understand these benefits and costs.*

Instructor Benefits

Through MIT OCW, MIT gains recognition, increases in visibility and reputation, showcases outstanding instructors, and connects with lifelong learners. Future students can review course content before enrolling. Current students have access to supplementary course content. And, alumni can easily revisit course content (Carson, 2005).

The Centre for Educational Research and Innovation, part of the Organization for Economic Cooperation and Development, attempted to identify some basic benefits, motives, and drivers for open educational resource usage and development for government, educational institutions, and individuals. They identified four main groups of possible benefits of individual instructors to participate in open educational resources: altruistic or community support, personal non-monetary gain, monetary gain, and not being worth the effort of keeping the resources closed (Trenin, 2007).

There is a belief that by sharing content instructors will be able to improve on each others' materials, share content they would not have been able to before, establish alliances and connections because of the content, have access to communities built around the materials, and encourage more good will through the sense of good will (Open eLearning, 2007; Trenin, 2007). There is also a belief that contributing to open educational resources includes monetary benefits, new cost recovery models, and reduced costs through cooperation and sharing via alliances, communities and networks (Parker, 2007). It can also allow for a higher return on investment from the instructor (and public funding) due to re-use of resources and increased access (Open eLearning, 2007; Trenin, 2007).

To achieve the important overall general benefits of reuse and access, first the content must be produced and shared by MIT OCW. If instructors do not understand the benefits—and that these benefits outweigh the costs—they will not likely contribute. To realize the ultimate goals of MIT OCW, instructors must understand what they may get out of contributing (why they would want to contribute). In the beginning, there were educators who believed that the benefits to open publishing would be enough to overcome the seeming costs to contributing. Has this really turned out to be the case?

Instructor Costs

Costs of MIT OCW have not been as researched nor documented as the benefits, but can include an increase in time and effort to contribute, because of needing to prepare course content for a new online location. Furthermore, content creators, including instructors, tend to not open license their works—which is viewed as giving up rights to duplicate, distribute, exhibit, or alter content—unless there is some perceived benefit for doing so. They might perceive direct monetary compensation (people will still buy the content even when it is available for no cost); indirect monetary compensation through advertising, sponsorship, or supplementary goods and services; recognition; a sense of altruism; a desire to advance progress; or something else altogether (Parker, 2007). But these benefits would need to outweigh the costs for instructors to open license their materials.

Problem

There is a seeming paradox between the costs (disincentives) of what MIT OCW is asking of instructors and the fact that instructors are choosing to contribute in the project. Normally, educators are apprehensive about utilizing open approaches to disseminating their creations. Yet, MIT OCW instructors continue to volunteer to contribute even when there appears to be costs for doing so. Research is needed to help understand what benefits and costs there are for contributing content to MIT OCW.

Research Questions

What are the reasons instructors contribute their educational content to Massachusetts Institute of Technology OpenCourseWare (MIT OCW)?

Research Sub-Questions

What benefits do instructors feel they receive for contributing to MIT OCW?

What costs do instructors feel they give for contributing to MIT OCW?

How do the instructors' perceptions of benefits compare to the instructors' perceptions of costs?

CHAPTER 3

METHODOLOGY

Research Design

This was a qualitative case study. The case was the OpenCourseWare project at the Massachusetts Institute of Technology (MIT OCW). The informants were the instructors who have contributed course content to this project.

According to Yin (1989), a case study approach is appropriate for this study because the focus is to answer a “why” question. I could not manipulate the behavior of those involved, I wanted to cover contextual conditions, and the boundaries were not clear between the phenomenon and the context. As Stake (1995) characterized qualitative inquiries, this was an intrinsic case study as it was descriptive in nature and I hoped to understand the particulars of the case. This type of case study is not conducted because the case represents other cases or because it illustrates a certain trait or problem, “but because in all its particularity and ordinariness, the case itself is of interest” (Baxter & Jack, 2008, p. 548). The purpose was not to understand some abstract construct or generic phenomenon, nor to build theory, though these are possibilities (Stake, 1995). With intrinsic case studies, the primary objective is to come to understand the case at hand. It helps “to tease out relationships, to probe issues, and to aggregate categorical data, but those ends are subordinate to understanding the case” (Stake, 1995, p. 77)

I employed only qualitative methods and did not conduct a mixed methods study to answer my questions. Though observing how someone contributes to MIT OCW

would not likely have resulted in discovering what benefits instructors felt they had received for contributing to MIT OCW, I did look to discover the way people were reacting in a real setting, through self-reporting (Stake, 1995). In this way, my study could be looked at as having taken the emic perspective—how the instructors viewed their situation, not how outsiders looking in would have described it (Fetterman, 1998).

Stake's (1995) case study approach was particularly useful, because it allowed responsiveness to the particularities of the case, emphasizing the importance of not over-prescribing data collection and research procedures. This allowed me to follow emergent themes. I did not know what instructors would specifically say nor what specific anecdotes regarding costs and benefits or they would divulge (though a previous pilot study gave me a general idea). For example, I could ask questions in addition to those found in the interview protocol when something unexpected and of interest presented itself. Though I assumed there likely were positives to contributing to MIT OCW which seemed to outweigh the negatives, I did not know specifically what instructors felt they were. I was interested in the perceptions of the instructors which provided the sense of realism and the thick description desired in a qualitative analysis (Slavin, 1992).

Methods

I conducted a content analysis of two data sources: (1) the annual evaluation reports and raw data (for years 2003, 2005, and 2009) (see Appendices A-E) which were the outcome of the annual surveys (see Appendix F) and interviews conducted by the MIT OCW Evaluation team; and (2) the nearly seven years' worth of online feedback

comments (see Appendix G) from students, educators, self-learners, and alums of MIT that were archived by the MIT OCW team (the first received Oct. 1, 2003, the last received Jan. 27, 2010). And, I conducted interviews of instructors specifically for this study (see Appendix H).

Pilot Study

Before beginning the study with MIT OCW, I conducted a pilot study with Utah State University's OpenCourseWare (USU OCW). I did this smaller study to test the interview protocol and get a better feel for what might be some themes, patterns, and trends worth pursuing. The instructor population was also smaller and more accessible to me. The pilot study involved an email survey (see Appendix I) and face-to-face interviews of the instructors that contributed to USU OCW (see Appendix J).

Pilot Study Results

Results of this pilot study helped me have a starting point on the likely possible patterns of MIT OCW, since before this pilot study, as a relatively unexplored area, my possible patterns to start with and look for were based primarily on second-hand anecdotes and assumptions from those who had talked with and observed contributing instructors. The results of the pilot study included the incentives and disincentives to instructors for contributing to USU OCW. I found some of the expected incentives (from previous anecdotes and assumptions)—like adding to reputation, being altruistic, and networking—but also found some unexpected incentives and disincentives—like instructors finding ways to receive monetary compensation, instructors using OCW as a

way to stand out as doing something unique, and instructors disagreeing with how their content appears in OCW. I categorized these incentives (see Appendix K) and disincentives (see Appendix L) as part of the results section of the final pilot study report.

How Pilot Study Informed This Study

The pilot study added much to the development of the full study, including refinement of interview questions and understanding OCW better from a contributing instructor point of view (gaining the emic perspective). Becoming more familiar with my protocol and interview process helped prepare me for the study with MIT. The incentives and disincentives categories began to emerge here that I was able to apply when gathering and analyzing the data for this study.

Something interesting to me was that I had approached the pilot study hoping to document and identify incentives to OCW, so I focused on the positives (incentives) that instructors receive from having contributed to OCW. During the interviews, though, instructors wanted to talk about the negatives (disincentives) as well. I was not looking for this, yet it was interesting, so I investigated these instances further when they came up. Doing so changed my perspective from pursuing an answer to “What are the incentives instructors perceive for contributing to OCW?” to wanting to discover an answer to “What reasons do you have to contribute? (because you must have perceived the benefits outweighing the costs, right?).” So, I switched for this study to discover benefits *and* costs, which is actually a more interesting pursuit. I added and altered questions on the survey and interview protocols to address this.

I do recognize that beginning the process of categorizing benefits and costs, in this pilot study, caused me to start recognizing patterns and groupings that I was not aware of before. I know that when I collected and analyzed the data for this study I looked for these patterns as potential patterns. I am also aware that I investigated and recognized other groupings and categories that I had not before considered. I feel the pilot study, in this way, improved this study and was not a negative factor.

Data Collection

I collected the data in several phases. From 2004 to 2010 I was in regular communication with Steve Carson, currently MIT OCW's External Relations Director, through phone calls, by email, and in face-to-face meetings when we both attended various conferences. I made one trip, at my own expense, to Cambridge, Mass., in October, 2007, to meet with the MIT OCW team to map out my future data collection plans. Their feedback guided my decision to include personal interviews of instructors, as the MIT OCW Evaluation Team felt this was a needed aspect to allow instructors to elaborate on their responses to surveys.

Table 1

Description of Data Sources

Data source	Primary or secondary data	Facilitator	<i>n</i>	Included in study	Description	Research method
2003 Report	Secondary	MIT OCW Evaluation Team	Invited= Approximately 950 Started Survey= 197 Completed Survey= 128	Yes	The researcher analyzed the sections on the report which were written based on the surveys that MIT instructors completed which they were emailed an invitation to take.	Content Analysis
2004 Report	Secondary	MIT OCW Evaluation Team	5000	No	This report did not result from surveys of MIT OCW instructors, but mostly from intercept surveys, so it was not included in this study.	Content Analysis
2005 Report	Secondary	MIT OCW Evaluation Team	148	No	The researcher received the raw survey data for this report	Content Analysis

					which was judged as being more appropriate to use as it was primary data, so this report was not included in this study.	
2005 Survey	Primary	MIT OCW Evaluation Team	Invited= 992 Completed Survey= 148	Yes	All MIT instructors were emailed an invitation to take a survey.	Content Analysis
2009 Survey	Primary	MIT OCW Evaluation Team	Completed Surveys= 169	Yes	All MIT instructors were emailed an invitation to take a survey.	Content Analysis
Online Feedback Comments	Primary	MIT OCW Evaluation Team	Total: 33,749 Alumni= 576 Educator= 1906 Educator - College/ University= 1518 Educator - High School= 531 Educator – Other= 646 Parent - College/ University= 62 Parent - High School= 41 Parent – Other= 74	Yes	The researcher received and analyzed a database of all online feedback comments received by MIT OCW between Oct. 1, 2003 and Jan. 27, 2010.	Content Analysis

			Self Learner= 11,643 Student= 6495 Student - College/ University= 4338 Student - High School= 854 Student – Other= 881 Unidentified= 4184			
Instructor Interviews	Primary	Researcher	4	Yes	The researcher conducted phone interviews of MIT OCW contributing instructors.	Interview

Content Analysis

Over the years, Mr. Carson sent me emails with attachments of the final Evaluation Reports in Word DOCs and raw data in Excel XLSs of each year's annual surveys and interviews (with the exception of the 2009 Survey, of which I only received the raw data). At the end of January 2010 he sent an email (see Appendix M) with an Excel XLS attachment which included all 33,749 feedback comments received by MIT OCW up to that point. Each row in the XLS included—in separate columns—the date, the feedback provider's global location, course related to the feedback (if applicable), demographic category of user (student, educator, self-learner, or alum of MIT), and the feedback comment.

Interviews

In the most recent annual survey, all contributing MIT OCW instructors received an emailed invitation to complete a survey regarding feedback about the initiative. As part of this survey, instructors were asked whether they would be willing to be interviewed regarding MIT OCW.

From the pool of instructors who said they were willing to be interviewed—and with the assistance of Stephen Carson—I selected instructors for interviews. My goal that I expressed to Mr. Carson was to interview nine instructors: three who had been involved with MIT OCW since the beginning, three who had been involved between 2-5 years, and three who had been involved less than two years. I also desired to identify specific instructors who had a variety of experiences—from positive to poor—with MIT OCW to achieve a more well-rounded view of the instructors (see Appendix M for the specific emailed discussion regarding how instructors were recruited for interviews).

I documented my experience in gathering the negative input, meaning I attempted to get instructors who have had negative experiences to be a part of the interviews, but if the attempt to include them was altered by MIT to, say, an email, I documented this process. The goal was to get a well-rounded picture of the feelings of instructors contributing to MIT OCW. This was viewed as beneficial when looking for the perceptions of benefits and costs.

To select the instructors for interviews, I referred to the 2009 annual survey raw data and identified positive and negative quotes that I considered to be the most interesting (and, by extension, might lead to the most interesting interviews) and worth

further investigation (see Appendix N). I sent these quotes to Mr. Carson and he contacted the corresponding instructors via email, including, in the body of the email, an explanation of this study which I wrote (see Appendix O). This sample was an Information-Oriented Sampling, which was employed in hopes of garnering a holistic picture of the case (Flyvbjerg, 2006).

Mr. Carson explained to me that due to some past negative experiences with the MIT OCW instructors who have contribute, it was necessary for the MIT OCW team to protect access to the instructors, and as such, he needed to be the one to do the final instructor selection and contact (this was one of his specific responsibilities on the MIT OCW team, to contact instructors regarding MIT OCW). Furthermore, the raw data sent to me was anonymous so I would need to go through the MIT OCW team to even be able to identify which instructors provided certain quotes. He selected nine instructors based on my requests and parameters. However, I have no way of knowing if the instructors selected were actually the ones who provided the quotes which I selected and sent to Mr. Carson. Also, as a means of being the least intrusive and keeping instructors at ease (and due to my distance), we decided to have Mr. Carson meet with the contributing instructors in person and I would be on speaker phone for a phone conference. He handled initial introductions and asked the early demographical-type questions to begin the interviews and then would turn the time over to me to ask my specific questions (see Appendix H). I then followed the interview protocol as naturally as possible in a genuine conversational-type interview. These interviews averaged about 30-40 minutes each.

After following this plan for three interviews, I realized all three were of instructors who were retired, and they were generally positive in their assessment of MIT OCW. I mentioned this to Mr. Carson and requested the next interviews be of a varying variety so I could attain the holistic picture for which I was aiming from the beginning. He told me that retired instructors are typically easier to schedule an interview and that is why he selected them. There did not appear to be any other reason he chose these particular three. I was not informed about the fourth interview being scheduled and when I was following up with Mr. Carson, he told me he had already conducted it and would send me the transcript. I followed up several times over several months regarding this transcript and to schedule the remaining interviews, yet I have not received the transcript and he told me that due to the time of the year, it would be difficult to schedule any more interviews. The findings section, which I member checked with Mr. Carson, includes data from these first three interviews.

Analysis

Unit of Analysis

The unit of analysis was the individual instructor who has contributed content to MIT OCW. To answer the research question, I gathered data (from feedback comments, past annual survey responses, and interviews) generated by individual instructors. Together, their responses made up the data of the case being studied. Different instructors responded in each data collection method. Each response was treated as an individual piece of the larger picture.

Data Analysis

I analyzed the data according to Stake's (1995) qualitative case study approach. This involved describing the case, undertaking categorical aggregation, making direct interpretation, establishing patterns, developing naturalistic generalizations, and completing a case document. More specifically, I described the case and its context in detail; grouped instances that are similar until something can be said; interpreted individual instances of the case; established apparent trends and patterns that are present; applied these patterns to greater things that might be informed by the case; and wrote the complete case document (methods, findings, and discussion) which records these items. I organized data from the content analyses and interviews by related data (themes, trends, patterns) in the findings section, interweaving the anecdotes, thick description, and salient quotes.

This data analysis method included acquiring statements, identifying meanings through reduction, finding themes through clustering, conducting a search for possible meanings, and giving a general description of the experience based on those themes, patterns, and trends. I bracketed, or set aside prejudgment or preconceptions, when obtaining a picture of the experience (Creswell, 1998; Denzin & Lincoln, 2000). Emergent themes and patterns that related to the original research questions were identified which followed the chain of evidence. From these themes and patterns, I developed conclusions and assertions that were qualified, data-driven statements which addressed the research questions. As these conclusions developed, I reviewed the case document to identify strengths and possible weaknesses of the conclusions. In effect,

“The nature of the study, the focus of the research questions, the curiosities of the researcher pretty well determine[d] what analytic strategies [were] followed” (Stake, 1995, p. 77).

I used the themes, patterns, and trends identified in the pilot study as a starting point for categorizing the data. The raw annual evaluation data and feedback comments were in Excel XLS when I received them, so I used a color-coding technique to cluster the related data points. I followed a similar technique in the annual evaluation reports and the interview data. Then as I identified new and emerging themes, I added these categories to the color-coding technique.

I began by analyzing the 2003, 2004, and 2005 Annual Evaluation Reports (see Appendix A). Steve Carson, then of the MIT Evaluation Team, provided me with both the final reports of all three years and the spreadsheet of raw data from 2005 (the final reports of the three years are currently publicly available online, e.g. http://ocw.mit.edu/ans7870/global/05_Prog_Eval_Report_Final.pdf). I found several pertinent data points in the “Faculty Suggestions for Process Changes” section of the 2003 Report. These were mostly suggestions for better understanding of the process of contributing to MIT OCW and its limitations, including intellectual property licensing. When I analyzed the 2004 Report I found very little on the instructors who contribute as this report focused on the Access, Use, and Impact of the visitors, that is to say, of those who were using the MIT OCW content (see Appendix A). All web analytics, online intercept surveys, and interviews for the 2004 Report focused on only users of the MIT OCW content.

For the 2005 Report, however—along with web metrics, surveys, and interviews which focused on visitors of MIT OCW, MIT students, and MIT alumni—there was also a survey conducted of MIT instructors. It is the resulting data from this survey which made the 2005 Report contain more pertinent data for this study. In reviewing both the raw data and the final report for 2005, I chose to analyze the raw data first, so as to not be influenced by any conclusions or categorizations made in the 2005 Report by the MIT OCW Evaluation Team. The open-ended, free response questions (see Appendix F questions 4, 5, 8, 11, 16, 18, 20, 21, 22, 24, 25, 26, and 28) provided the data points for this study.

I then analyzed the raw data I received from the 2009 Annual Evaluation Report. The data points from this source were the complete responses which MIT instructors provided in response to the 2009 Survey conducted for the 2009 Report. All of their responses to open-ended questions were included. These responses were valuable as the most current data points from the MIT instructors included in the annual reports.

I then received the spreadsheet of comments from the “Contact Us” feedback page on the MIT OCW website (see Appendix G) that MIT OCW had archived between Oct. 1, 2003, and Jan. 27, 2010, from “self-learners,” “students,” “educators,” “alumni,” and “parents.” Though most of these data points came from those using MIT OCW, they were helpful in establishing a bigger picture and understanding for me. I found it interesting to compare the student feedback along with the instructor feedback of users of MIT OCW which added to what the MIT OCW contributing instructors had provided in the Annual Reports.

By this point in the analysis process, I had identified major overlapping themes and possible categories of data (see Appendix P) which had grown out of the pilot study results and the analysis of the four annual survey Evaluation Reports. I assigned each theme a color and color-coded the 33,749 individual responses in the spreadsheet accordingly. It was going through this process where solid categories of benefits and costs materialized, to which I could refer in the subsequent instructor interviews.

I integrated new categories that emerged and I combined some categories which I had not before recognized as belonging together. For example, I had not considered that students who are taking, or recently took, a specific MIT course could use MIT OCW as a way of providing anonymous feedback regarding the course. This was a newly-found benefit for the instructor. An example of combining categories include when I realized that *Lack of Support*, *Extra Time Involved*, *Clearing Intellectual Property*, and *Preparing a Course for Both the In-house MIT Learning Management System and MIT OCW* all belonged under a single theme of *Requirement of Extra Resources*. Another similar example is when I realized the only *Non-Monetary Loss* was *Damaged Reputation* and that *Cannot Update Content*, *Inability to Adapt Materials*, and *Content Being Left Out* all led to a *Damaged Reputation*. Another similar example is when I realized that *Altruism* actually was referred to by many as a way of demonstrating *Improved Reputation* of the instructor or of MIT (and that if MIT's reputation improved, by extension, instructors felt like their reputation did as well).

After conducting the content analysis of the four years' MIT OCW Evaluation Reports and the feedback comments, I worked with Mr. Carson to identify the specific

instructors to interview. As I interviewed the instructors, I looked for not only more information regarding their previous responses, but also for any new or emergent data from which I could pursue more details. Based on these interviews, I went back to the previously analyzed data and looked for any new themes I may not have identified before.

After final categorizing of data, I wrote the findings and discussion sections of the case document.

Credibility

Regarding the question of credibility, the appropriate concepts to use when discussing rigor in a qualitative study are “trustworthiness” and “authenticity.” In accordance with Creswell’s (1998) and Lincoln and Guba’s (1985) criteria for establishing trustworthiness and authenticity, I specifically employed (1) using multiple data sources and (2) recognizing and explaining my perspectives.

For this study, triangulation of data sources played a major role (Denzin, 1989). Consistent with Stake’s (1995) case study approach to data collection and reporting, I used (1) a content analysis of feedback comments from and regarding instructors who have contributed to MIT OCW that have been archived by the MIT OCW team, (2) a content analysis of the annual evaluation reports and raw data which came from the annual surveys, and (3) interviews of the instructors. The three data sources were not only meant to establish a bigger and clearer picture, but also to provide confirmation of findings. Stake (1995) argued that multiple data sources should be used to generate more

credible data, which will increase the degree of credibility of the assertions generated (Fetterman, 1998).

Data quality was enhanced based on the principles of idea convergence and the confirmation of findings (Knafl & Breitmayer, 1989). In this way, I compared one source of data against another as a way to generate more credible data. Information gleaned from one source was fact-checked against and used to supplement other sources. Unlike the other two sources, the annual evaluation reports and raw data were anonymous and therefore could have provided different information than the feedback comments and/or interview responses. The emails were unsolicited (unlike the evaluation reports and interviews) and therefore could have potentially offered differing points of view. These three sources were also designed to capture data from different respondents, since it was believed that different instructors would respond to the survey requests and the interview requests than those that sent feedback comments.

Stake's (1995) methodology relies heavily on the continuous interpretation *of the researcher* while gathering data. This is to serve as a constant reminder to the researcher that he or she is to strive to have an open-minded point of view, suspending judgment until conclusions are warranted by the evidence and not letting preconceptions get in the way of seeing the reality that exists. Since I did not play the role of a participant observer, where I would have needed to attempt to minimize my role as interpreter while in the field in order to protect the integrity of the original data, I was able to do as Stake suggests. The data from the content analyses of the evaluation reports and raw data, and

feedback comments, and the interview analysis—included in the case document—became the basis upon which I made any assertions.

Also, in qualitative case studies, there has been a perception that the perspectives of the researcher can inform what data are collected, what data are ignored, and how they are interpreted. This perception may be due to this type of issue being more often encountered, yet not as often properly dealt with, in qualitative case study methodologies. In this study, for example, I could have misinterpreted what was intended in the archived feedback comments and survey responses, simply by reading my perspective into the data. Though triangulation can serve as a mitigation tool for researcher perspective, it cannot mitigate a perspective that cuts across all data sources. The goal, then, was for me to recognize and explain these perspectives.

To help identify my perspectives, assumptions, and stereotypes, during the initial categorization of the content analysis data and before I conducted the interviews—and even before the informants were explained their rights to confidentiality by reading and signing the consent form—I took part in a bracketing interview. Bracketing means to bring out a person's theoretical presuppositions prior to engagement with the phenomenon under investigation (Van Maanen, 1983). Bracketing interviews are conducted to sensitize interviewers to conceptual perspectives that might serve to change their interpretive vision (Pollio, Henley, & Thompson, 1997; Thomas & Pollio, 2002). This type of interview was used to confront the interviewer (me) with the phenomena of the investigation so that I could understand the phenomenon from the perspective of those who experience it (Van Maanen, 1983). The main purpose in taking part in this

bracketing interview was to have an awareness of my own experience with OpenCourseWare. For this bracketing interview, an outside person (a faculty mentor with no connection to this study) asked me the interview protocol questions and wrote up a summary letter (see Appendix Q).

In line with the bracketing interview summary letter and the full transcript (see Appendix R) the following were my perspectives at the beginning of data collection and analysis:

I was an advocate of using open licensing. I believed that the current understanding of copyright law (and licensing) is in opposition to what the U.S. Constitution states in Article 1, Section 8, Clause 8 that protection of the rights of authors and inventors is “To promote the Progress of Science and useful Arts.” That is, by protecting our creations for the sake of monetary gain, we are allowing the mean of compensation to become the end, which can have an effect of limiting progress. And, we need to employ open licensing to promote progress in the digital age.

I was concerned about my works being used without attribution back to me. It was difficult for me to feel honored, as some of the Asian countries do, when my works are used without prior permission. Sometimes I liked the recognition that comes from having created something that someone else values enough to use. It was difficult for me to share ideas and creations freely and openly even though I knew there were benefits for doing so.

The largest benefit that I recognized for contributing to OpenCourseWare was the networking and the collaboration between peers and colleagues. I believed that

collaboration, like co-presenting at conferences, was an outcome of contributing to OpenCourseWare, and that these efforts add to one's reputation and experience as can be demonstrated on a curriculum vita.

The largest drawback I recognized for contributing to OpenCourseWare was the time it takes in order to prepare quality content and make it ready for public accessibility. A major concern I shared was that in a password-protected Learning Management System an instructor can claim educational Fair Use when utilizing copyrighted material, but in OpenCourseWare an instructor cannot. Therefore, if particular course content uses copyrighted works, it must be removed, recreated, or replaced in order to have a similar level of quality as the original materials. Doing these activities takes time.

I felt the quality of course content increases when placed in OpenCourseWare because of the increased number of people who would view it. If instructors think their peers or even students will be reviewing the content they have produced and placed in OpenCourseWare, then they are more likely to create the best possible content, because their public reputation is involved.

I thought funding agencies should still be actively involved for another three years, at least, because there is still a lot that needs to be done to investigate the potentials of OpenCourseWare. Ways to promote collaboration and easy improvement of the content need to be created, which will take people and time, which means it will take money.

I believed the benefits to instructors contributing to MIT OCW (improving networking, getting more grants, having greater recognition, etc.) outweighed the costs

for having contributed. This might have caused me to overlook the effects of negatives from having contributed to MIT OCW—ones that could have overpowered and outweighed a positive to a given instructor. I also recognized this perspective in my pilot study where I found though it was easy and natural for me to focus and follow-up on positives, it was more difficult for me to pursue negatives.

Therefore, by recognizing I had these perspectives, I took steps to identify and explain their influence on the study. I make these clear so the reader can make decisions regarding the trustworthiness and authenticity of the study. In the pilot study, with practice, I found I could specifically pay attention to my perspectives during the interviews (for example, I could pay attention to when there were hints of negatives in responses, since I have a tendency to look for positives, at which time I could further pursue the negatives). In this way, I felt I have been able to understand this perspective, which served me in the collection and analysis of data in this study. At the same time, I recognize that perceived benefits analyzed in this study could be lower, and perceived costs analyzed in this study could be higher, because of my perspectives at the beginning. It is also important to note that I received no funding for this study.

Limitations and Scope

The self-reporting of the contributing instructors is a possible problem with the surveys. They were left to interpret what was requested of them on their own. Some data may not be indicative of how other contributing instructors felt since not all those who contributed were interviewed.

The instructors who were selected by the MIT OCW team may have been selected due to their positive experiences with MIT OCW. There is no way for the researcher to know if the instructors selected represented a holistic picture of the contributing instructors. There was also a small number of instructors who self-selected for interviews and who were ultimately interviewed. Regardless, all data came from instructors who participated in MIT OCW so it is possible actual overall participation costs of MIT OCW are higher, which this study did not address.

Also, the perspective of the researcher can affect the data, especially when interpreting what was intended in the archived comments. Responses could have been interpreted incorrectly, in part, because the reader or interviewer had perspectives going into the study.

The online feedback comments are likely to be on the positive side since those who want to compliment take the time to do so while those who want to complain are likely to just move on to something else without voicing their thoughts, or to just ignore the MIT OCW project.

Generalizability

Since this is a case study, generalizability is limited. The findings of this study may or may not apply to other cases. That would be determined by those examining this study and applying it to other, perhaps similar, situations.

Though not likely to be generalizable to a larger population or perhaps even to another OpenCourseWare project, the findings of this study will help guide understanding and future studies. All of these conclusions, as part of a qualitative case

study, do not have inherent generalizability to other populations (Lincoln & Guba, 1985). Their power, instead, lies in providing others with narrative descriptions which allow for making inferences about other possible situations. This process might begin with the researcher applying apparent patterns to greater things that might be informed by the case. However, the researcher should focus on the real purpose of the case study, which is particularization, not generalization (Stake, 1995).

Since every case is unique, case studies are not meant for producing generalizable findings. As Merriam (1998, p. 19) put it, “A case study design is employed to gain an in-depth understanding of the situation and meaning for those involved. The interest is in process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation. Insights gleaned from case studies can directly influence policy, practice, and future research.” Additionally, as Stake (1995) has suggested, case studies can be used, in some instances, to suggest problems with, or modifications to, broad theories, perhaps identifying avenues to pursue and holes in theories that need exploring.

CHAPTER 4

FINDINGS

In this chapter I present the Perceived Instructor Benefits of Massachusetts Institute of Technology OpenCourseWare (MIT OCW) and the Perceived Instructor Costs of MIT OCW. These are not necessarily the reasons instructors initially decided to contribute (or not contribute) to MIT OCW, nor the reasons for continual participation (or non-participation) of the instructors. I focused instead on the benefits and costs that instructors identified they have received for having contributed to MIT OCW. These benefits and costs categories are supported by the different data sources.

Perceived Instructor Benefits of MIT OCW

Instructors expressed several perceived benefits, which I have organized into seven categories: *Improved Reputation*, *Networking*, *Supplementary Opportunities*, *Improved Course Content*, *Course Feedback*, *Students Accessing Materials*, and *Working with the MIT OCW Team*. I have ordered these categories how I considered to have the most logical flow from one into the other, building upon relating data points. In so ordering, these categories are not necessarily placed from greatest to smallest, or most important to least important, or otherwise.

Table 2

Perceived Benefit and Cost Categories

Benefit or Cost Category	Data sources supporting category				
	2003 Survey	2005 Survey	2009 Survey	Interview	Online Feedback Comments
Benefit 1: Improved Reputation		X	X	X	
Benefit 2: Networking		X	X	X	
Benefit 3: Supplementary Opportunities	X	X	X	X	X
Benefit 4: Improved Course Content		X	X	X	X
Benefit 5: Course Feedback					X
Benefit 6: Students Accessing Materials		X	X	X	
Benefit 7: Working with the MIT OCW Team		X	X	X	
Cost 1: Damaged Reputation	X	X	X		
Cost 2: Loss of Intellectual Property Rights		X		X	
Cost 3: Requirement of Extra Resources	X	X	X		
Cost 4: Realignment of Individual Professional Goals		X			
Cost 5: Public Materials		X	X		
Cost 6: Working with the MIT OCW Team		X			

Benefit 1: Improved Reputation

Instructors felt their individual reputations are improved due to MIT OCW, because (1) the world supports what MIT is doing regarding MIT OCW; (2) the world positively views the altruism of MIT and its departments; (3) when MIT or a department

increases in reputation, the instructors' reputations increase as well; (4) the greater access to and availability of materials; and (5) the increase in communication with people from around the world.

Instructors recognized a benefit in having people around the world aware of MIT OCW. They felt like they are in a more positive light just because MIT OCW is viewed as a positive thing by others. When the world looks more favorably on MIT or a particular academic department, instructors feel their reputation improves. They feel the world supports what is happening with MIT OCW. When discussing benefits, an instructor on the 2009 Survey said, "From talking to people at other institutions, it has become clear to me that it reflects *very* positively on MIT as an institution in their eyes."

One benefit recognized by instructors is the raise in MIT's reputation for doing something altruistic: something that can benefit the world. An instructor on the 2005 Survey said it this way, that MIT OCW is "a strong demonstration of the ethic of sharing resources for everyone's benefit." Another instructor discussing benefits in the 2005 Survey said, "OCW hasn't helped my classes, but I still think it is an excellent resource that I strongly endorse as a public service." Speaking of MIT OCW, another instructor on the 2005 Survey said, "I love it and I think it's great for science, education, and the general welfare of the world." while another said, "OCW is likely to continue to reflect positively on MIT as an institution (sic) that shares knowledge and has concern and compassion for the global community."

By extension, MIT instructors felt that when the reputation of MIT, or even their own academic department, increases (because of altruism or otherwise), their reputations also improve. Two instructors on the 2005 Survey expressed this by respectively saying, “OCW has brought tremendous, positive attention to MIT from all over the world and enhanced our reputation,” and “makes me proud to be part of an institution that has OCW.” Three instructors on the 2009 Survey summed up this sentiment by saying, “OCW has had a positive impact on MIT’s brand, and this is important for all of us,” “OCW is one of the most important MIT initiatives that I’ve seen in 30+ years on the faculty. It is a great gift to the students of the world. We should do what ever we can to continue OCW,” and “The public visibility of OCW is a huge asset for MIT. Don’t get rid of it, even if it is expensive!”

When speaking of benefits to the department one instructor on the 2009 Survey commented, “The availability of all the course material in one ... place makes it easy for users to find it. As a result, many more users are looking at our courses, which enhances our reputation.” Another instructor in the 2009 Survey referred to the famous *Walter Lewin Lectures on Physics* when speaking of the increased accessibility of course content due to MIT OCW by saying, “It has made our department member Walter Lewin famous, raising MIT’s visibility.” This is supported by an online feedback comment which said, “I have been watching Prof. Walter Levin's Physics lectures, and have begun to understand and enjoy Physics. Kudos to Prof. Levin to make this material enjoyable and understandable.” And, an instructor responding to the contacts and collaborations

question on the 2005 Survey said, “General visibility outside MIT among academic departments in my area of expertise.”

Instructors viewed the availability of MIT OCW to other countries as a benefit. One instructor on the 2009 Survey said, “around the world everybody knows and loves OCW for the incredible resource that it is, and this is great for MIT!” while another on the same Survey said, “My research is with developing countries, who really don't have access to the kind of teaching we have at MIT. I think OCW performs an incredibly valuable service to open what we do at MIT to the developing world.” One retired instructor said in the 2009 Survey when identifying a benefit, “I'm impressed with statements of people around the world on the great usefulness of OCW as a whole.” Another instructor on the 2009 Survey said MIT OCW “is positive because it exposes the broader world to MIT teaching that might not otherwise have had the opportunity.” Another instructor on the 2009 Survey was specific regarding this benefit in saying, “I hear only good things about it. My relatives in Colombia who are engineers and/or associated with universities, for example, think very highly of MIT's OCW effort. I have heard similar comments from colleagues in France and Spain.” And another on the 2009 Survey said, “I have told many people in other countries about OCW (mainly in Latin America) and they are always impressed.” In her interview, one instructor said:

MIT was, with OpenCourseWare, for me, addressing a hugely important problem for the population of the whole world, flattening the hierarchies of the world, giving access to very bright persons born in poverty. This seemed to me to be perfect for MIT's vision and something that OpenCourseWare demonstrably is

doing. From my point of view, that was a very MIT kind of thing to do. ... I've done a lot of work in Africa and I know of two villages in Africa where OCW is used extensively.

One instructor responding to the “other” open-ended response of the “How have you used OCW?” question in the 2009 Survey said, “I have 94 video lectures on OCW. I am receiving daily a dozen questions regarding these lectures from people all over the world. I often watch parts of my own lectures to understand their questions.” Responding to the request to describe contacts and collaboration because of MIT OCW, another instructor in the 2009 Survey said, “Comments from people that I only semi-knew that they had reused some of my worksheets. It was great!” Another instructor responding to this same request said, “My ... OCW site is the #2 Google hit under ‘Transport Phenomena’, and thanks to OCW I used to have 3 of the top 5 rankings under that search.” And, an instructor in the 2005 Survey said, “I have been inundated with questions about OCW as I travel around the world. It is fun to see how much interest and admiration it has generated.”

Instructors felt having the materials available to any one in the world increases the audience of their materials, which, if the materials are good, can increase their individual reputations. Young instructors felt they could establish or create their reputations, advancing instructors felt MIT OCW added to their tenure and promotion portfolios, and retiring and retired instructors felt they had the opportunity to leave a legacy.

Benefit 2: Networking

Instructors felt that either relationships with others are strengthened or are created because of (1) the increase in communications, (2) online interactions with people they may never meet, and (3) face-to-face meetings that occurred.

One instructor on the 2005 Survey said he received “lots of positive comments from colleagues at conferences!”. An instructor mentioned in her interview that she receives “two or three emails a week from people who say they saw my materials in OCW and I would not otherwise have heard from these people.” This is fairly considerable since this instructor's course content was put into MIT OCW several years ago, in 2003. She continued by saying, “I don't recall any miserable questions in email. In fact, I would say more than 99 percent of these communications are either useful or I would welcome.” One instructor in the 2009 survey answered the “How have you used OCW?” question by saying, “I constantly use it to answer questions from afar.” This implies that instructors are receiving contact from individuals with whom they would not likely have had contact if not for MIT OCW.

In the “other” open-ended responses of the contacts and collaborations question in the 2005 survey, several instructors mentioned involvement in collaborations. One said “I have met people [online] I never might have met.” In the interview when asked about positives of MIT OCW, one instructor said:

It's been fun for me to meet [through the Internet] major figures in Europe and Asia, New Zealand, Australia, Japan, and India. Over seven years, I've met dozens of people virtually I would not otherwise have met, and probably never

will meet in person. It has been an effective tool to meet others internationally. This has increased my interaction and collaboration with them. ... For example, there's a professor in the United Kingdom who found my course [content in MIT OCW] ... and I've corresponded with him ... about how he's teaching various entirely different groups of students in the United Kingdom. Some are adult union workers. Some are adult students at a university. And, some are 17-year-olds. It's been fun to talk with him about what kind of cases would appeal to each of those groups and to think about how theory applies slightly differently cross-culturally with the very different cultures that he's dealing with.

In the 2009 Survey on the contacts and collaboration question one instructor simply put, "many new colleagues," while two instructors, on the impacts request, respectively said, "It is a (sic) mostly a way of distributing the material widely because folks around the world go to OCW more easily than to my specific course web site." and "My course syllabi and student work have been on the Web, open to all, since 1996, so OCW did not change my approach. It has led, however, to many more people viewing."

An instructor on the 2009 Survey said, "I spent an entire afternoon with the Prime Minister of Ethiopia ... after he had read about OCW and wanted to know more." An instructor mentioned in his interview that "I was invited to do a seminar at Boston University and I was able to tell them to check out my book in OCW. Later, I sent them a copy of my hard-copy book."

Instructors felt they have stronger and more relationships with people who have seen their course content, than before when it was not part of MIT OCW, and that this is beneficial.

Benefit 3: Supplementary Opportunities

Instructors felt there are several opportunities because of contributing to MIT OCW. These include (1) financial compensation, (2) book publishing, (3) speaking and presentation invitations, (4) projects, and (5) funding.

Some instructors felt the compensation they received from the MIT OCW team was a benefit. One instructor on the 2005 Survey said, “The financial support associated with publishing on OCW has been helpful to me in several ways, including development of better material.” Another instructor on the 2003 Report supported this statement and added a recommendation by saying, “OCW provided me \$2,200 to pay a graduate student to do this work for me, and it was valuable to me and I believe to OCW. The lecture notes were not really usable in my hand-written format, and so there would have been much less to post without this support. I hope OCW will assist other faculty to do the same.”

When asked about book publishing, in the 2005 Survey, most instructors said there is no impact, either way, positive or negative (none). Several said they plan to publish a book which is already in MIT OCW, and do not anticipate problems or were even benefited in the publishing process by MIT OCW. For example, two instructors said, respectively, “The book I plan to write is in the early stages of preparation so I have not reached this point. I do not anticipate it being a problem,” and “My possible text is

still pretty hypothetical, but I don't anticipate that my ability to publish it will be hurt (or helped) by OCW." One even said, "I already had a contract for the book. So OCW has not changed anything. The publisher approved the publication of certain book materials through OCW." In one of the interviews, an instructor shared his thoughts on this subject:

Because it was in OCW, I got copy editing on my book from the publisher which made it even better before it was published. I think publishers recognize that if you price it right, it will sell even though it is available freely online. To tell you the truth, I haven't really followed up on it, so I don't know how well the book has sold. The preface of the book does include a reference to OCW, so I guess we both benefited.

Some instructors specifically felt that publishers discovered their materials in MIT OCW. For example, one instructor on the 2009 Survey said, "Dover Publications discovered my textbook on OCW, contacted me, and offered me \$\$ upfront (sic) if I gave them permission to publish, which I did. They published my text, supplying much needed copy editing service. And this in no way infringes on the freedom of OCW visitors to access the text on line and print out the same for educational use."

Regarding speaking and presentation invitations, one retired instructor said in her interview, "The invitations I get now to come talk about [my research area] around the world probably are OCW related, at least a little."

Instructors mentioned projects in which they are invited to participate that they attribute to MIT OCW. In the 2009 Survey, one instructor said, "I was recently invited to

be a co-editor of a web project sponsored by the National Humanities Center:

<http://onthehuman.org/> When the Editor-in-chief ... introduced himself to me, he said that he has been using my materials on OCW for his teaching for several years, and was so impressed by the lecture notes, etc. that he was sure I would make a great addition to the team. I was blown away. I accepted the position and am delighted to be part of the project. Thanks to OCW!”

The online feedback comments support this view of the instructors, that MIT OCW opens up invitations to projects that may not have otherwise occurred. One user wrote, “I am starting a business that might be interested in licensing the open courseware materials in an innovative way. I want to speak with someone on how to benefit the program.” An instructor in the 2009 Survey touched upon the benefit that since the materials were openly available they could be reviewed beforehand for projects by saying, “It has prepared potential sponsors prior to establishing agreements on project scope, output, methodology and costs.”

In the 2009 Survey, one instructor said that MIT OCW “has been a useful reference when seeking funding for subsequent projects. (five since 2003)”. Another instructor on the 2009 Survey said, “I am on an education grant headquartered at Kent State University in part because of OCW.” And an instructor said in his interview:

I have sought funding for five projects recently which made reference to OCW.

The grantors viewed OCW as a positive thing. By being willing to show our course content it probably showed that we were confident but not cocky about the

quality of the teaching we were doing and about the interest people would have in the content and the ideas we were working on.

The benefit of supplemental opportunities, including financial compensation, book publishing, speaking and presentation invitations, projects, and funding, was recognized as benefits to instructors.

Benefit 4: Improved Course Content

Instructors felt it a benefit to have many eyes providing feedback on their content because (1) users find mistakes in the materials and offer suggestions directly to the instructors, which improve the course content; and (2) instructors felt the materials are made better by being publicly available.

Many online feedback comments were from users who were identifying mistakes or deficiencies in the MIT OCW materials. The feedback ranged from being as broad as one user writing, “it is patently evident that, even by its own promise, it is grossly incomplete. ... This course is so incomplete that it should be deleted” to as specific as another user writing, “While checking my solutions for Quiz 1 from the Linear Algebra 18.06 series, I noticed Professor [X] made a mistake in his solution for Problem 3, part d. In the solutions, he writes that $x \text{ nullspace} = x3[-3 \ 0 \ 1]$ (the column is written as a row due to typing restrictions) while it should be $c[1 \ 0 \ -3]$.” This feedback supports the view of instructors that course content can be improved because of many people looking at it.

Responding to the contacts and collaborations question on the 2009 Survey, one instructor said “[I] receive periodic feedback, questions, suggestions for improvement.” Responding to this same question on the 2005 Survey, one instructor wrote, “users of the

material have pointed out mistakes.” Another instructor on the 2009 Survey mentioned this benefit by saying, “I have become aware of changes to information that I should change, if I get time to do so.” One instructor shared the following in her interview:

About a half a dozen times a year I communicate with other teachers around the world about the topic of negotiations [her course topic]. We find it beneficial to compare what we are each teaching and how we are doing it. My discussions improve their work and vice-versa. Over time the quality of what we are teaching increases. This process has been made much easier because of OCW, because now, they can see the work I am doing and we can look at details of the materials I am using. Because of this I am a fierce supporter of OCW. This is among the two or three best things MIT has done since I came on in 1973.

Instructors did feel that this way of providing feedback could be improved if there were some way to directly contact the instructor from the materials. On the 2009 Survey, one instructor when suggesting improvements for the updating process said, “Students should be able to contribute to updating.” So, either students need to be able to contact the instructor directly from the course content about which they want to comment, or students need to be able to make the improvements themselves.

Instructors also mentioned that they tend to find mistakes in their own materials when they use them from MIT OCW. One instructor in the 2009 Survey said, “I discover errors when I use the material.”

Instructors also felt they are able to better prepare their materials because of being able to review other course content. That is, since they can see the course content from

courses before and after their course, they can better fit their materials within the course of study.

Instructors felt that by contributing to MIT OCW they could get feedback from others to improve their course content. Mistakes could be found by users, and by themselves, when they reviewed their own course content on MIT OCW.

Benefit 5: Course Feedback

Instructors benefited from receiving feedback regarding the course itself because of MIT OCW. Students use MIT OCW as an outlet for student evaluations by leaving online feedback comments. These are not feedback items on the materials, such as those which are trying to improve the course content, but instead these are feedback items on the actual course itself provided by current students or students who recently completed the course. This is supported in the comments from students in the archived online feedback comments.

These student comments covered anything from how much a student enjoyed a particular course to instructional techniques and methods used by the instructor. Examples include students who said, “Great course! Dr. Agarwal does a great job in the lecture!”; “Excellent. I have never seen such a good and dedicated instructor”; “I found your course very interesting and easy to understand”; and “Prof. Walter Lewin 8.01 Physics I: Classical Mechanics course was brilliant. He provided a very simple explanation of the relationship between the time and distance for an object falling to the Earth and in the process introduced the concept of uncertainty. Thank you, I will be signing up for the rest of the semester.”

Benefit 6: Students Accessing Materials

Instructors felt that having (1) prospective students, (2) current students, and (3) former students accessing the MIT OCW materials is a benefit. Prospective students can see what a course will cover to help them in their planning, which makes advising easier for instructors; current students can have access to supplementary materials more easily than they would otherwise, which takes a load off of the instructors; and former students can access course content after the course is over, without having to burden the instructor by requesting it. Since these aspects help students have a better experience, the overall benefit is that if students have a better class experience they will not only learn more, but they will look more highly on a course and its instructor.

Instructors use MIT OCW materials to advise prospective students. In the 2005 Survey when filling in the open-ended “other” response on the item “Please indicate any ways you have made use of YOUR OWN materials published on the OCW site” one instructor wrote “referred prospective students to the sites.” Another instructor in the 2005 Survey, discussing benefits, said, “It is helpful to point students to when they are considering taking the course.” One instructor in her interview said, “It [having materials in MIT OCW] made it much easier to discuss the course with future students.” Another instructor in the 2009 Survey, responding to the “How have you used OCW?” question wrote, “Advising students about their course of study.” And, three other instructors in the 2009 Survey mentioned this benefit by respectively saying, “[MIT OCW is] helpful in finding courses for my students and for my advising,” “It has helped me from time to time in my role as an advisor, and also at times when I am asked to approve substituting a

different class for mine as a required subject in a student's academic program," and "Students were more aware of current course content and curricular philosophy after viewing OCW". Another instructor in the 2005 Survey said, "It provides a convenient way to find out in detail what material is covered in classes related to those I teach (especially pre-requisites)."

The concept is that instructors felt benefited because they could better and more quickly advise students, who could then plan more appropriately and be more prepared for certain courses because they have reviewed the materials beforehand. As one student put it in an online feedback comment: "I WAS so excited to receive this information. I plan on including this inmy (sic) school plan. Thank you."

Some instructors even brought up the possible benefit of increased interest in their courses and departments simply because prospective students have access to the course content. One instructor in the 2009 Survey said, "There is some uncertainly here. For example, our PhD applications went up some 50-60% over the past two years. Is this the economy? A bump in our popularity? Or -- who knows? -- the impact of OCW?" MIT OCW does not only serve as a marketing tool for courses and departments, it also allows students to "test drive" the courses to make sure they are the right fit for them.

Instructors can easily supplement their in-class experience with materials on MIT OCW, which means current students can have a better class experience. They can direct students to these materials which students can peruse on their own time and at their own pace. One instructor, when discussing benefits on the 2009 Survey, said, "Both my film course site and my modern fiction site are helpful in my other teaching, as I can direct

students to essays posted there; I sometimes recommend one or another of the lectures to students in my other courses.” Commenting on the benefits of having contributed materials early which affected teaching later versions of the course, one instructor said in her interview, “It’s made my life simpler to have hand-outs already available [to students].” Instructors can tell students to go to that course’s MIT OCW content and access, download, and/or print-out the materials beforehand. This further prepares the students for the course and makes the course more streamlined and convenient for the instructor.

Former students of a particular course have continued access to the course content, because MIT OCW is openly available online. Frequently, even though course content is available online during the course, it is behind a password-protected barrier of some kind, often as part of a learning management system, like MIT’s in-house system called Stellar. Once the course is over, students no longer can access the materials. If they forgot to print out some materials or misplaced them from when they were in the course, they have no way of acquiring these materials except to contact the instructor and request them. Instructors then have a choice: they either ignore the requests; respond to the requests, saying the materials are no longer available; or respond to the requests, providing the materials either in an email attachment or by granting limited (and usually password-protected) access to the materials in an online location. By having the course content available in MIT OCW, instructors do not receive as many of these such requests because the students already know they have access to the course content, and requests that instructors do receive can more easily be responded to by simply directing the

students to the course content online in the MIT OCW location. Students and instructors are saved time and effort by having materials available in MIT OCW.

If students have a better class experience, instructors felt this reflects better on them, which is a benefit. Prospective students, current students, and former students having access to course content in MIT OCW helps them have a better experience.

Benefit 7: Working with the MIT OCW Team

Some instructors felt working with the MIT OCW team was a beneficial experience. One instructor when discussing benefits of MIT OCW on the 2005 Survey said, “The OCW staff member who worked with me on my course was patient, diplomatic, and very professional. I am happy that MIT is providing OCW to the world.” Another instructor on the 2005 Survey said, “the OCW staff members that I have interacted with are excellent! I have been very impressed with their professionalism, knowledge, enthusiasm, and desire to be helpful.” Another instructor when making a suggestion for improving the updating process on the 2009 Survey said, “It was great, the staff made it very easy.” Another instructor when mentioning benefits on the 2009 Survey said, “Every interaction that I have had with the people working on it has been superb.” In her interview, one instructor, when asked about benefits of MIT OCW, said, “The publication process was very smooth.” Instructors felt that they were benefited by having the opportunity to work with a great team on a great project.

Perceived Instructor Costs of MIT OCW

Instructors also expressed several perceived costs, which I have organized into six categories: *Damaged Reputation*, *Loss of Intellectual Property Rights*, *Requirement of Extra Resources*, *Realignment of Individual Professional Goals*, *Public Materials*, and *Working with the MIT OCW Team*.

When analyzing the 2009 Evaluation Report raw data, I took note that of the 169 instructors who took part in the 2009 Survey and were asked “What are your reasons for NOT publishing course materials on OCW? (Please check all that apply)” not one of them checked the response “I have heard colleagues describe negative experiences with OCW participation.” So, apparently, there is little talk of negative experiences, at least regarding contribution, with MIT OCW instructors. This perception of few negative experiences is different than recognizing costs, as instructors could view those as two separate aspects. One instructor, in her interview when I asked about costs, said there was nothing that she considered out of the ordinary from regular improvement to the course she does each year, and made this clear by stating, “I have incurred no negatives.” She is in the minority, as instructors identified some costs for having contributed to MIT OCW, even though they may not consider these negative experiences.

Similar to how I ordered the instructor benefits, I have ordered these categories of costs in a way which has the most logical flow from one into the other, building upon relating data points. In so ordering, these categories are not necessarily placed from greatest to smallest, or most important to least important, or otherwise.

Cost 1: Damaged Reputation

Instructors were concerned about damage to their reputation and to MIT's reputation. They did not want (1) users mistaking the materials for complete MIT courses. Instructors were concerned about (2) the inability to update their materials easily, which could have the most severe effect of appearing out-date. And, instructors were concerned about (3) the detrimental effect of not having the option of claiming educational Fair Use on the materials they contribute to MIT OCW.

Instructors felt like there is some risk in damaging their reputations, and MIT's, if users misunderstand the materials, especially when users think they are actually taking an MIT course, when they are not. The MIT OCW course content does not capture the MIT course experience, so if people think they do, the reputation of MIT could be damaged. One instructor on the 2009 Survey said, "I wonder sometimes the risks of giving people the impression that they have 'taken' an MIT course without actual interaction or evaluation." Another continued this sentiment on the 2009 Survey by saying, "OCW presents a one-dimensional view of MIT education. You can't get a meaningful, high-impact education at MIT without the face-to-face, engaging dynamic and energy of classroom teaching."

Instructors feel that, over time, having materials they cannot easily update available to the world can make them look outdated or behind the curve. They do not like being unable to improve course content once it is up on MIT OCW, or they do not like that it can take months to get updated materials available. A common comment is exemplified by instructors on the 2009 Survey who said, "It would be nice if classes were

updated more frequently,” “Contacting contributors periodically about corrections/updates [would improve OCW],” and “Updates would be good.” Another instructor when commenting how to improve the MIT OCW publication process on the 2005 Survey said, “Provide a way for faculty to put update the content on their OCW sites (allowing for an IP review by the OCW staff before the revised materials are released).” Regarding how to improve MIT OCW, one instructor on the 2003 Report simply said, “to make a small change in the published material I had to wait two months.”

Two different instructors’ comments on the 2009 Survey explain how they feel about their course content being outdated: “The versions on ocw are more than 4 years old.” and “The newest versions of advanced graduate courses are often missing. A delay of few years is quite substantial for cutting edge research.” One instructor on the 2009 Survey compared materials in MIT OCW to the materials in the MIT in-house, established learning management system, called Stellar, when saying,

I am ignorant of how one makes sure that the materials posted for a course are current. My two courses, for example, have never been updated to my knowledge, but each semester I teach them there are changes made in the materials, so that by now the Stellar archives are a much better resource than is OCW.

Another instructor on the 2009 Survey when responding about impacts said,

Essentially no impact. I already use Stellar. The OCW materials are out of date, and had to have significant material scrubbed so they are not very useful. Also, I think it highly unlikely that a student could get much/anything out of just our

OCW materials alone. They do not stand alone without lecture.

Because MIT OCW is a new way of utilizing digital educational content (open licensed, not password protected), “there is no direct legal precedent clarifying the applicability of fair use” (Bays et al., 2009, p. 3) for the content used. Therefore MIT OCW chose to have all content pass through an approval process by the copyright holder(s), where they give permission for the content to be used. Instructors felt their reputations could be damaged because of MIT OCW’s method of omitting, replacing, or recreating content for which copyright holders could not be deciphered or for which copyright holders were not willing to give permission to use their content. This method could make the MIT OCW contributing instructor's materials appear inaccurate or incomplete. An instructor on the 2003 Report said, “some of the material didn’t pass the copyright muster and was deleted leaving ugly white open spaces in my material. I know this is hard but we need to identify ways to get broad copyrights from many sources, especially web sources.”

Regarding educational Fair Use, one instructor in the 2009 Survey simply said, “The entire material should be posted - slides, handouts, homeworks.” Another instructor, recommending an improvement to MIT OCW in the 2009 Survey said, “Allow posting of materials that are fair use for educators. Current substitution of OCW-generated substitutes are not as rich or clear and materially detract from the educational quality of (at least my) OCW courses.” Another instructor, recommending an improvement to the publication process, in the 2005 Survey said,

OCW should take a more active role in pursuing the 'fair use' of copyrighted

materials. It is a big problem for me that all the images from my lectures must be excised for fear of copyright litigation. That is gutless and bad for the educational mission of the university. What happened to 'fair use'?

And another instructor in the 2005 Survey stated,

We need to deal with the whole issue of copyright. I feel queasy about possibly infringing copyright by making papers available to my MIT classes, but will not do this for OCW users, who therefore have a much harder time following the material in my classes, which is often taught from papers, not books.

Instructors felt a cost of contributing to MIT OCW was the damage to their or MIT's reputation because of users mistaking the materials for complete MIT courses, the inability to update materials, and the effects of not being able to claim educational Fair Use on their course content.

Cost 2: Loss of Intellectual Property Rights

There was some concern over how MIT OCW affects instructors' intellectual property rights. These included protecting their materials under the agreement of the open license and concern about future publication of their course content in MIT OCW.

Instructors expressed concern over people using their works and not attributing.

One instructor in 2005 survey said,

I have been quite disturbed to discover my own teaching materials included (without acknowledgment) in a colleague's OCW site for the same course. I have also seen materials that I strongly believe to have been written by a TA included in an OCW class, again without acknowledgment. I have chosen not to make a

continuing issue of this for a variety of reasons, but I remain quite surprised that OCW does not at least ask those who are chosen to produce sites to verify that the material is theirs to post. I urge greater care and vigilance on this matter.

One instructor shared her insights in her interview regarding how academics' works get used all the time without attribution, and MIT OCW just makes this easier and more common, but that she has never cared before so she does not care now. She views it as a way to collaborate:

People take my work constantly. I am quite frequently apprised by some colleague somewhere or another that “Smitty” or “Jones” has picked up a piece or something I’ve written and included it in his or her article. Occasionally, that’s a kind of thievery. But more frequently it’s kind of collaborative without giving credit. In my case, because of the nature of my work, I don’t care a bit. I know that I’m a tiny little fish in the sea that you are studying.

She went on to give specific examples of how her work gets “lifted all the time, sometimes knowingly and sometimes not,” and that “since my topic is on how to properly treat human beings, I’m more pleased than not when my work is used. I want to help people in my field so it’s a pleasure for people to lift my materials.” Then she added:

When I was younger and traveling around and being invited here and there, because my work was being used, OCW would have helped. It would have been enormously helpful. It would have brought in more invitations to visit Stanford or London or wherever. I’m trying to eliminate the topic where some people are

extremely annoyed about having their work stolen.

Instructors felt concerned over how the open license of MIT OCW would affect the ability to commercialize any of the materials. Responding to the question regarding how MIT OCW affects the publishing a book, one instructor on the 2005 Survey said, “Haven’t got to that point yet, but am concerned about it.” Another instructor on the 2005 Survey describing future costs said, “the impact of the ultimate publication of my course material.”

Cost 3: Requirement of Extra Resources

Instructors felt there was extra time and effort required in MIT OCW in (1) putting materials in MIT OCW, especially regarding the time and effort to get intellectual property right clearances and approvals; (2) maintaining course content and responding to inquiries involving the materials; (3) changing the current version of the course because of the materials being available online; (4) having to prepare materials more than once, for MIT OCW, for their personal websites, and for the MIT learning management system; and (5) understanding a new publication process, especially if instructors do not get the support they needed.

On the 2009 Survey, one instructor said, “The major hassle is vetting OCW substitutes for materials on my course slides that in my view are acceptable as is for educational purposes fair use.” while another said the “biggest issue is getting copyright approval for images. I create most of my own but those I get from other sources can be difficult to find the right person for copyright approval.” Speaking of the MIT OCW team, one instructor on the 2005 Survey said, “They should work harder to get

permission for individual figures and illustrations from other publishers to be cleared. It is the largest hurdle I had to get lesser substitutions or [have] blank spots in the material.” Another instructor on the 2005 Survey said, “It was hard to get the pictures and other materials I wanted on OCW, presumably because of IP concerns. In some cases, we probably could have bought the right materials for a pittance.” On the 2003 Report, one instructor said, “Clearing the copyright of most of my figures or graphs is a nightmare. We should think at an alternative - e.g. OCW staff removing the picture, but putting in a verbal description.” And, even though another instructor said in his interview, “I haven’t had anything negative since publishing,” he added that there was “a little extra energy locating the originals.”

Instructors felt that there is an increase in time and effort to maintain course content and respond to inquiries involving the materials. One instructor on the 2009 Survey said, “I have received a fair amount of unwanted email from students at other universities requesting that I post additional materials.” Another instructor mentioned in his interview when asked about any negatives, “I’ve received a few emails that I felt I needed to take the time to respond to.”

Instructors felt they need to put more time and effort into changing their current courses since the materials for them are available online, usually because students would have access to past exams and solutions. One instructor said, in the 2005 Survey, he was reluctant to contribute to MIT OCW because “I use a textbook in most of my courses. Thus, the only original material I have to post are the solutions to problems. Once I post them, I cannot assign those problems.” It would be extra effort and time for this

instructor to make the material original each time it is taught. Another instructor on the 2005 Survey, when answering the “How have you used OCW?” question, said simply, “avoiding problems with previously published solutions.” What he meant was: since he had published solutions on MIT OCW, he had to take extra time and effort to check to be sure the assignments he was giving his class did not involve items which would include the available solutions. If the assignments did involve the published solutions, then he would need to take extra time and effort creating new assignments. Another instructor on the 2009 Survey said, “The main negative is just one of time: the more materials are out there (esp. solutions) the more each new version of the class must be fresher.”

A recurring theme among contributing instructors was that they they wished MIT OCW could link out to their materials on their personal course website. They wanted to prepare the materials only once for online use. If they were going to prepare them for their own website, they wished MIT OCW would just link out to that website. As one instructor on the 2009 Survey said, “For courses that already publish all of their materials online, OCW should simply link to that course’s web site.” Speaking of MIT OCW, another instructor on the 2009 Survey said, “Tie it closer to existing courses by reducing/avoiding the translation step from a course Web site to OCW.”

Some instructors went so far as to say their personal websites were superior and more dynamic so they were really wasting time doing MIT OCW *and* having their own websites. One said, on the 2003 Report,

Right now my own course website is superior to the OCW site, though there are a few features, eg, search, that I would be pleased to incorporate in my own site.

My main regret is that my own course/website does not benefit at all, since the OCW pages depend on materials available only on the OCW servers, so I can't port copies of the OCW pages to my current course.

Another instructor expressed this sentiment in the impacts request of the 2009 Survey by saying, "I have had my course materials on the web for a long time. OCW is totally redundant and -- because the updating cycle is so long -- second rate to my primary web publications of courses." Another instructor on the 2003 Report shared this sentiment regarding the length of time it takes to update MIT OCW versus a personal website in saying, "At the moment, I prefer outside colleagues to go directly to my own course websites rather than to the OCW version."

Or, if instructors were going to prepare their course content for the MIT in-house, established learning management system, called Stellar, they wished the same preparation could work toward contributing the materials to MIT OCW. They wished there was a tighter link between MIT OCW and Stellar, so they did not have to create the course content twice. As one instructor on the 2009 Survey put it, "Perhaps some merger between OCW and stellar would make sense. Instructors could dedicate [sic] for all materials in their classes which ones of these would be public and which ones only visible to enrolled MIT students." And another instructor in the 2005 Survey when commenting how to improve the publication process simply said, "There should be a tighter linkage between learning management systems such as Stellar and the OCW publication process." When asked how to improve the updating process, another

instructor said on the 2009 Survey, “By merging stellar and OCW[,] updates would be essentially automatic.”

Finally, some instructors expressed that more time and effort had to be dedicated to contributing materials to MIT OCW because of the lack of support from the MIT OCW team when preparing and publishing the course content. Two instructors on the 2005 Survey when commenting on how to improve the publication process respectively said, “much more technical support,” and “Offer more technical assistance to Professors.” Another instructor on the 2005 Survey was more specific in saying,

There is no mechanism for providing support for knowledgeable TAs to serve as notetakers or to otherwise participate in the developing OCW content. It was very disappointing [sic] to learn that OCW rules forbid paying TAs or other graduate students who are working on OCW content. Only OCW approved notetakers are allowed, and these people do not have a sufficient knowledge base to take notes or to even understand the course material.

And another instructor on the 2005 Survey said, “I wasted a significant amount of time preparing for OCW participatiing [sic] only to be mis-advised by OCW staff regarding support for notetakers. The amount of time needed to prepare OCW material seems unreasonably large.”

Instructors perceived a cost in the extra time and effort needed to clear materials for intellectual property, maintain course content, change the current version of the course, have to prepare materials more than once, and understand how to put course content into MIT OCW.

Cost 4: Realignment of Individual Professional Goals

There was some sentiment among instructors that they had to realign their individual professional goals with the goals and mission of MIT OCW. Some instructors felt compelled to contribute and treated like lesser citizens if they were against MIT OCW. They changed their goals in order to contribute, so it could not be held against them. They wanted to avoid any negative repercussions or bad feelings for not contributing. One instructor on the 2005 Survey when discussing costs said, “OCW is not for MIT. It does not connect well with students and does not serve their (or my) needs.” Another instructor on that same survey response said,

I think OCW is a bad idea. I am only involved because I was harassed endlessly. I have enough trouble getting students to come to class without lectures on-line, and I don't think other schools should teach courses they way we do. Typically, MIT courses cover too much material too quickly. It is not a good model for anyone else.

Cost 5: Public Materials

Some instructors found a cost in having their course content publicly available online. Regarding students, this cost is because some take short-cuts on assignments, or they decide to not attend the in-class sessions of the course because the materials are accessible on MIT OCW. And, regarding the instructors, some are apprehensive in having their materials available for review by their peers and colleagues.

One instructor on the 2009 Survey said, “The only negative is that some students report that easy access to old homework assignments and solutions sometimes

encourages to take short cuts on homework by looking them up where they feel they shouldn't have done so.”

When mentioning a cost to MIT OCW, one instructor in the 2005 Survey said, “I think that there was a slight decrease in attendance due to materials being on line.” An instructor in the 2009 Survey said, “We were afraid that the OCW site would decrease attendance so we started taking attendance using clickers. Taking attendance with clickers has increased attendance.” One thought about the potential cost of lower student attendance is included in a response by an instructor in the 2005 Survey who said, “I believe it may contribute to decreased attendance [sic] of students in lectures and recitations. (Instructors need to better understand ways in which they can enhance 'live' experience in the classroom!)”. One instructor on the 2005 Survey simply described this cost by saying, “students will stop coming to class.”

Regarding having their materials exposed to the critique of their peers and colleagues, one instructor in the 2009 Survey said, “It has made me reluctant to put information that might be questioned by a colleague on a handout [which will be contributed to MIT OCW].” Another instructor explained a cost on the 2009 Survey by saying, “I have no [sic] participated in the videotaping [sic] of lectures- I strongly am opposed to this. If my lectures are videotaped, then I need to change how I teach- I need to make things much more scripted. Im [sic] not going to speak extemporaneously and have what I say put out on the web.” And two instructors on the 2005 Survey explained how this reluctance to post course content publicly affects their materials by saying, “I feel the need to make the material more polished for publication on OCW. I see this as a

obstacle for rapid improvement of my lecture material. ... Having highly polished course materials be the norm discourages innovation in the curriculum.”

Cost 6: Working with the MIT OCW Team

Some instructors perceived having to work with the MIT OCW team to be a negative experience. One instructor on the 2005 Survey said, “I found the e-mails/interactions with the OCW folks somewhat offensive.” Another instructor who actually identified himself as one who has not been to the MIT OCW site, nor contributing to the site, sheds some interesting light as to why he is not contributing by saying,

I do not like the tone of the e-mails/phone calls that I receive from OCW about participating. I feel that they are coercive - starting with the presumption that you are not a good citizen if you do not agree to list your course material. If I had been approached differently, it is possible that I could have been persuaded to participate in some capacity. As it is, I am pretty entrenched against it.

Summary

Generally speaking the findings corresponded with what I had discovered during the pilot study. Some categories of benefits and costs were the same as in the pilot study (*Networking, Improved Course Content*), some became a smaller part of a larger category (*Altruism, Avenue to Leave a Legacy, and Build Reputation of Instructor* became part of *Improved Reputation*; and *Promote Course Materials* was separated and became part of *Improved Reputation and Students Accessing Materials*), others expanded and became

big enough to serve as their own categories (*Establish a Revenue Stream* became *Supplementary Opportunities*, and *Easy of Access to Course Materials for Others* became *Students Accessing Materials* as a benefit and *Public Materials* as a cost), and others manifested themselves in this study (*Course Feedback*, and *Working with the MIT OCW Team* as a benefit and a cost).

In the next chapter, I discuss what I felt was the most interesting aspects of these categories, including aspects that I felt were anticipated and which were not.

CHAPTER 5

DISCUSSION

Perceived Instructor Benefits of MIT OCW**Benefit 1: Improved Reputation**

I had not anticipated that instructors would feel like their individual reputations improved if the institution's or their department's reputation increased. This shows that MIT instructors' identities tie very strongly to their institution and department. They care what happens to these entities and view it as a reflection of their individual reputation.

The talk of altruism, though anticipated because it is discussed in the literature as being one of the main reasons for doing something involving open licensing, I had not thought would be so pronounced. For some instructors that reason alone makes MIT OCW worth doing on an individual level and an institutional level.

Making educational content more accessible to the world was a benefit I had anticipated. What I had not anticipated was how MIT instructors would consider this to fit right in with MIT's vision. I still am not clear why instructors felt this way as MIT is not like a land-grant institution with a mandate of reaching out to lesser-served populations. I believe some instructors simply have the perspective that it is a calling of a more privileged population (like they view MIT) to assist those who are under-privileged.

Because of the results of the pilot study, I was anticipating more mention of young instructors feeling they could establish or create their reputations.

Correspondingly, I was anticipating advancing instructors feeling MIT OCW added to their tenure and promotion portfolios. They did not mention this specifically, but did so indirectly when they discussed how MIT OCW increases supplementary opportunities like publishing and funding, and how MIT OCW improves their reputations. I was somewhat surprised that there was only a little talk, even among retiring and retired instructors, that they had the opportunity to leave a legacy. This had come up fairly clearly in the pilot study as a likely benefit of MIT OCW. This may be due to the different perceptions of their reputations and of the caliber of instructors between two separate institutions.

Benefit 2: Networking

I anticipated seeing more data to support that instructors were finding other people because of their content being in MIT OCW. I thought instructors would express more the benefit of connecting with colleagues because of the course content on MIT OCW. Of the 105 contributing instructors who responded to the question “How have you used OCW?” on the 2009 Survey data, only three selected the response “Developing my network of researchers within my area of specialization.” This surprised me as I had expected a large instructor benefit of MIT OCW was being able to connect with others which would lead to collaboration efforts.

Of those who did discuss the benefit of meeting people, especially those they would not have met otherwise, I wonder how many of these interactions are because of the course content being in MIT OCW, and how many of them were because MIT was simply doing something new and innovative which drew people in. In other words, the

networking opportunities may have been the result of the novelty of MIT OCW and not the actual project.

Benefit 3: Supplementary Opportunities

I anticipated seeing more supplementary opportunities than were reported by instructors. Only one instructor really brought up speaking and presentation opportunities that were related to MIT OCW. I thought this had the potential of being a major benefit of MIT OCW to contributing instructors.

I do not see financial compensation as a real, lasting benefit. This benefit is a contrived example, a way of getting early adopters to commit. Such compensation is not a long-term benefit built into the open publishing system.

The supplementary opportunity that really stood out to me, though, was book publishing. I found it interesting that not only did instructors feel that having their materials in MIT OCW did not affect their book publishing plans, but they also recognized that publishers were willing to publish materials that were freely available to users. This implies that publishers recognize that there still is a market for a hard-copy text book that is already available online. Instructors considered having their materials online as a way to market them; a way that publishers could discover them and offer financial compensation in order to be able to publish them; and a way to get editing which improved the materials.

Benefit 4: Improved Course Content

This benefit falls right in line with one of the overall benefits of open content: that

the more people can review the material, the more feedback is provided to find mistakes and offer suggestions for improvement. I had not anticipated, though, that instructors would discuss finding their own mistakes in their materials. This may be the product of reviewing their materials more frequently or in a way they had not done before.

Benefit 5: Course Feedback

I had not anticipated this benefit. The idea that OCW itself could serve as an avenue to receive feedback on the course had not shown up in the pilot study. In fact, it did not show up in any of the data from the four annual Evaluation Reports. I did not realize this was a benefit until I was analyzing the data from the feedback comments and there were many from students who had recently completed the course. They wanted to leave a comment regarding the quality of the course itself.

I decided to follow-up on this idea with the interviews of the instructors. They mentioned how they had indeed received direct anonymous feedback through MIT OCW from recent students, and how they felt this was a benefit.

This type of course evaluation feedback can be valuable to instructors wishing to improve their courses. It would serve as additional feedback than what may be received through standard course evaluation procedures at an institution.

I wonder, though, how many of these comments came from students who thought the materials in MIT OCW are “a course” instead of course content. So, when they say they “just completed a course” do they really mean that they just went through the materials in MIT OCW? An example of this is apparent when a student said, “Thank you very much for your efforts with MIT open course ware. These courses enabled me to

pass the MCAT exam and apply for medical school this year. I would not have had the funds otherwise to apply. Thank you!” If users meant “course content” when they used the term “course,” this could make a difference in the interpretation of that data set. All the feedback, positive and negative, pertaining to a particular course, would actually then be referring to the MIT OCW course content, which is not a complete version of the course.

Benefit 6: Students Accessing Materials

The idea that instructors could use materials in MIT OCW as an advising tool was new to me. There were several instructors who emphasized that this is their greatest benefit. Students are better prepared mostly because instructors are better prepared to advise them and because students could go through the materials before taking the course. This can have an indirect effect on improving the reputation of the instructor, the course, the department, and MIT.

I found it interesting to investigate the contrasting views of instructors who said that current students having access to the materials in MIT OCW was both a benefit and a cost. The cost is discussed below under *Public Materials* and is basically centered around students not attending class because they feel they have what is most important, the course content. The benefit of current students having access to materials ties into one of the overall benefits of open educational resources, which is that self-learners have access to materials and can use them to supplement their individual learning opportunities. Current students have options, offered and presented by instructors with whom they are familiar, to add to their current classroom experiences.

The fact that instructors view it a benefit to have former students accessing course content in MIT OCW was anticipated as it was one of the identified benefits in the pilot study. I did anticipate seeing more evidence of this, as there were only a few mentions of it in the interviews and online feedback comments. It caused me to wonder if this was more of a benefit with an institution, like Utah State University in the pilot study, who, as a land-grant institution, has a mandate to reach out to under-served populations, and thereby engages in extensive distance education programs, including offering many courses online using password-protected learning management systems. An institution, like MIT in this study, who does not engage in extensive online education programs, may not see as great of benefits from having course content available in OpenCourseWare, because they do not have as much content online behind password-protected barriers.

Benefit 7: Working with the MIT OCW Team

I had not anticipated that instructors would view the act of working with the MIT OCW team as a benefit. I just figured this would be considered part of the process with no benefit or cost associated with it. Instead, as it turns out, instructors tended to feel that the process of doing what was necessary to contribute course content was either beneficial or costly. They may have viewed it as a benefit because it was something new and different, or perhaps because they believed in the cause.

Perceived Instructor Costs of MIT OCW

Cost 1: Damaged Reputation

It was anticipated that if there were a category of *Improved Reputation* there

probably would be one of *Damaged Reputation*. Instructors have legitimate concerns for appearing outdated simply because they were unable to update the course content and for having material omitted, recreated, or replaced because of educational Fair Use problems. These can make an instructor or the institution, who have reputations of being “cutting edge,” appear to be behind in quality.

One aspect that I had anticipated, because of the pilot study, which was not very prominent in this study, was the concern over instructors not having the opportunity for final approval of course content. I anticipated seeing more complaints about the inability to approve the materials before they are published to the world. Instructors do not typically like their creations tweaked and then presented to the world as if they were the instructors intent, unless they are approved by the instructor beforehand.

Cost 2: Loss of Intellectual Property Rights

I found it interesting that instructors were less concerned about giving up their intellectual property rights, than they were about infringing upon others’ rights. Perhaps this is the mentality of attribution and giving credit where credit is due that exists among educational institutions. The concern of how attaching an open license to their materials would affect publication is a common preoccupation among instructors. This could be overcome if instructors understood that the benefits of marketing and increased exposure of their materials outweigh the risks and costs of giving permission ahead of time to others to reproduce, exhibit, distribute, and alter their creations.

Cost 3: Requirement of Extra Resources

Requiring extra time and effort being perceived as a cost by instructors was anticipated. In fact it is the extra time and effort, along with the fact that instructors open their materials to the public and give up some intellectual property rights, that establish the paradox in of why instructors choose to contribute to MIT OCW.

The idea of linking out to personal websites or to course content in MIT's learning management system Stellar may represent a lack of understanding of the open licensing agreement and educational Fair Use claims, since intellectual property rights are treated differently with MIT OCW, personal websites, and password-protected learning management systems. Having the content interlink would not really be a feasible option.

I view an increase in inquiries regarding materials a positive outcome of contributing to MIT OCW. This would mean that users are interested in the course content and want to learn or have access to more. Viewing this as a negative seems backwards to the reasons MIT OCW exists in the first place: to offer course content to the world in hopes it gets used and generates interest.

Regarding the sentiment of having to learn a new publication process, it would seem productive to me to first make the process as stream-lined and intuitive as possible for instructors; and second, to provide the requisite support they need. The goal being to have the instructors succeed at what they are doing, which will help the users, the institution, the department, and the instructors in their educational pursuits.

Cost 4: Realignment of Individual Professional Goals

It was surprising to me that there were instructors who felt compelled to do MIT

OCW. I would think that compelling an instructor to participate would go against the philosophy of open content thinking: that people should be free to choose to contribute or to not, and that by choosing to contribute they recognize potential benefits.

In one perspective this cost can be viewed as a benefit: that if instructors contributed, they avoided negatives of not contributing. This seems backwards to me, since I cannot see how avoiding a negative can really be considered a benefit. So, instead, I interpreted this as a cost: basically having to live with the choice of realigning individual professional goals after contributing.

Cost 5: Public Materials

I had not anticipated that having materials public for current students to review would actually promote student attendance to decrease. Furthermore, I was surprised to see how many instructors really disliked this, considering it a cost of contributing. If the lectures and class discussions are not a necessary part of the course (for learning and to achieve positive marks) and do not add to the course content, then the in-class sessions should be improved. There needs to be more discussions, activities, social interactions, demonstrations, etc., which cannot be duplicated in a digitized manner. Students must live the experience of learning, not just access the educational materials. It is like the old adage: if all that an educational institution offers is access to the materials, we would only need libraries. Instead, what is important is how the materials are utilized, with instructional techniques, that really makes them educational. The stand-alone materials are not necessarily educational. Instructors who recognize this would not be intimidated by having their course content available to their current students, especially if the largest

perceived threat is that students will decrease their class attendance. I agree with the instructor who said, “Instructors need to better understand ways in which they can enhance 'live' experience in the classroom!”

Regarding instructors being concerned about their peers and colleagues reviewing their materials, though most instructors viewed this as a benefit (for *Improved Course Content*), some found it intimidating and a cost of contributing to MIT OCW. This is one of the reasons contributing to MIT OCW is viewed as a paradox, because instructors typically do not like their classrooms exposed to the world. I do not see why instructors are concerned about the feedback of their colleagues. My view is if the content is good it will be praised and if the content is bad it will be given recommendations for improving. Either way, it causes an instructor to have better materials over time. If an instructor feels so poorly about his or her materials that may say something more about their quality of materials, than anything else.

A cost that I had anticipated to come up, which did not, was having to take a risk that instructor course content can be misunderstood and/or taken out of context. I was aware of several examples of instructors (and MIT) having negative experiences which had occurred because the course content was public and people misunderstood the meaning or intent, or their were interpreted incorrectly because they were taken out of context. I was interested in finding out more about these stories and of any others.

Cost 6: Working with the MIT OCW Team

I had not anticipated how frank, open, and strong some instructors would be with their feelings on what they felt was so negative regarding having worked with the MIT

OCW team to contribute their materials. Several instructors felt coerced and marginalized by the team. MIT OCW could benefit from discussing this cost with its instructors in order to learn how to overcome it.

Conclusion

This study sought to help understand what reasons instructors have to contribute their materials to MIT OCW, because common logic would suggest against doing so. The answer is because the benefits seem to outweigh the costs, the positives seem to be greater than the negatives, the incentives seem to be more than the disincentives.

Assertions

1. *Improved Reputation* seems to be the benefit instructors focused on the most.
2. *Realignment of Individual Professional Goals* seems to be the cost instructors focused on the most.
3. It seems that instructors felt the benefit of *Improved Reputation* is greater than the corresponding cost of *Damaged Reputation*.
4. It seems that instructors felt the benefits of *Improved Course Content*, *Course Feedback*, and *Students Accessing Materials* are greater than the corresponding cost of *Public Materials*.
5. It seems that instructors felt the benefit of *Working with the MIT OCW Team* is greater than the corresponding cost of *Working with the MIT OCW Team*.
6. The overall MIT OCW instructor benefits seem to be greater than the costs.

The case description of this study showed that the possibilities of benefits around the world are great for the OpenCourseWare initiatives. But, these external benefits are not likely to be realized if instructors do not understand how the benefits outweigh the costs for contributing, because they are the ones who are producing and offering the content upon which everything else is built. Additionally, these external benefits are not likely to be realized if the benefits of OpenCourseWare are viewed as limited to a special case of Massachusetts Institute of Technology, that is, an elite institution, with high funding and established reputation. Therefore, further investigation is needed.

OpenCourseWare offers the world a tremendous opportunity to increase the accessibility and quality of educational content. If it can be regularly shown that those who expend additional time, open their content up to more exposure, and give up most of their intellectual property rights still find contributing to such a cause worth doing (the benefits outweigh the costs), then this movement of open content will only continue to grow.

Once the benefits to contributing to an educational open content arena, like OpenCourseWare, are understood, instructors who find these benefits motivating will be more likely to continue participating and instructors who are not yet contributing will more likely consider doing so. Over time the diffusion of this innovation will continue to increase, and the consequences—desirable or undesirable, direct or indirect, anticipated or unanticipated—can be discovered (Rogers, 2003).

It is worth recalling that the Open eLearning Content Observatory Services says that “rather than expecting a radical change or a ‘re-invention’ of education from within

the educational institutions, we think it more likely that a diffusion of new forms of online communication and collaboration into the institutions will slowly change educational practices” (2007). They also caution to focus not just on providing access to more content in digital formats, but on considering whether these resources promote true innovation in teaching and learning (Open eLearning, 2007). It is this type of “innovation” that could lead to higher quality educational practices and content.

One intention of this study is to help improve the quality and accessibility of OCW content because the instructors understand better the benefits for being involved. They, in essence, get to serve as educational change agents. It is important for the instructors to understand the perceptions of other contributing instructors because, yes, perceptions matter. However, it is not the perceptions of outside experts or change agents that matter, but for the individuals who are involved to express their perceptions of the attributes of an innovation, which will affect its rate of adoption (Rogers, 2003).

Broader Impacts and Practical Importance

There is little doubt that regardless of how open educational resources—which include OpenCourseWare (OCW)—play out technically, economically, socially, legally, and regarding content, they will not only have an impact on education, but can also be an important continuation of a bigger movement. What is not known, however, is the scope, breadth, and depth of this impact. What began as a sensible, common occurrence of digital content—that of openly sharing software—has grown to permeate educational

content, and, with the advent of open licensing, has the potential of affecting any industry which makes use of digital content.

The findings of this study can serve as a document to inform future instructors who might be interested in contributing to the general OpenCourseWare movement. Also, if we understand what benefits come to educators who openly offer their materials, similar benefits might extend to other arenas. Likewise, if we understand what open models of sustainability function in education, similar models might extend to other arenas. Functioning and sustainable models can include marketing, advertising, supplementary goods and services, and individualizing. These models might apply to the entertainment, artistic, and mass communications industries, for example.

Yes, the OCW movement can help reach the goal of education for all, since it increases the free flow of information, which nourishes academic progress (Smith & Casserly, 2006). And, yes, there are still many issues to address, including copyright issues, costs, accreditation standards, open access journals and books, open access learning management systems, available alternatives, efficiently locating content, the meaning of scholarly communication, and the meaning of education itself at a global level.

Possible Future

Understanding benefits and costs to the content creators of open content initiatives will help understand how to handle digital content. If the benefits outweigh the costs on a consistent basis, then a future—not too distant—could exist where all digital

content, once released to the public, is done so with only the right of attribution being retained by the creator (at the creator's choice, because it is actually more beneficial to do so). This future would be very different from what we have now, where authors, inventors, and artists protect their digital creations for the sake of compensation. Instead, as the U.S. Constitution originally specifies (in Article 1 Section 8 Clause 8), we could go back to the means leading to the ends—the mean being protection of rights for a limited time with compensation being an incentive, the end being progress. We could get back to progressing the creations we have. Digital content becomes more open, more freely available, to be accessed and improved upon.

No longer would the focus be on protecting a digital creation for the sake of maximizing compensation. Instead, the focus would be on how to generate income (if that is a goal of the creator at all) using other business models. If digital content is considered high quality, it is the nature of others to give financial support to the creator, a la the shareware model. If creators' digital content becomes well-known, either to the masses or within a specific niche, the creators' reputations are raised which can have positive effects: invitations to speak or make public appearances (like book-signings, concerts, etc.) where they can be compensated accordingly, hiring opportunities as an independent contractor for digital content projects or consulting, and increases in demand for supplementary goods and services (t-shirts, merchandising, tech support, etc.). Or, if the digital content is used as a vehicle for an experience that cannot be replicated digitally, consumers will pay for the experience, which, by extension, will compensate

the creator for the digital content creation (like going to the movie theater, attending a concert, meeting creators in person, etc.).

Digital content creators can always choose to not release a creation digitally and/or to not take advantage of opportunities their creation affords. Indeed, they already do this in today's world: perhaps they have enough compensation, reputation, and recognition; or, they choose to be a "starving artist."

Trademark laws and patent laws would remain in force, so there would still be protections of digital works for specific uses (images, audio, names, tag lines, etc.) and protection for inventions that cannot be easily duplicated digitally. Therefore, if creators' works are used in a way that violates the open license agreement, trademark laws, or patent laws, there is still legal recourse. And, if a creator's work is used in a way that is legal, yet of which the creator does not approve, a statement or appearance can be made by the creator where it is stated that the creator does not approve of this use. By so doing, it is clarified what the creator intended as the original meaning and his or her reputation can be raised regardless. This is assuming that the use also falls outside of protected uses, such as Fair Use (educational, journalistic, parody, etc.). The legal recourses used to protect the open licensing agreements would be used less often and be less costly compared to the lengthy and expensive copyright protection lawsuits of today.

There are those who say the number and costs of lawsuits would not go down and that the line would simply move from protecting all copyrights (duplication, distribution, exhibition, and alteration) to protecting the open license requirement of attribution. I

believe by moving this litigation line, the content creator will have benefits outweighing the costs.

More and more digital content creators are recognizing the benefits for being open. They are choosing to go against the system because the benefits outweigh the costs. They are choosing newer business models so that progress can be supported *and* they can have incentives for creating, which is the original intent and goal of copyright law.

Further Research

This research is a starting point in documenting the benefits and costs of contributing instructors of Massachusetts Institute of Technology OpenCourseWare. It would be interesting to see how the findings of this study and other similar studies impact the decision to contribute and participate in OpenCourseWare projects by instructors.

Regarding the benefits and costs, in general, there are several interesting avenues worth further investigation. One interesting avenue would be to look at a more longitudinal study, over time, to see if the perceived benefits are the same for both late adopters at about five years after starting, and for the early adopters who are further along in the process. It would be interesting to see if the benefits and/or costs diminish over time.

Another interesting avenue is something this study did not address: to compare the reasons instructors decided to contribute to MIT OCW with the benefits and costs they actually received. Did they receive the benefits they thought they would? Correspondingly, it would be interesting to understand the reasons instructors choose to

not contribute materials to MIT OCW. There were, in fact, several questions in the annual surveys which addressed these reasons for not contributing. The responses of these questions are not part of this paper as they fell outside of the scope of this study. Instructors also had some to say on this topic in the interviews, which, again, was outside of the scope of this study. It would be worth going back to these data points to investigate these reasons for contributing and if they materialized.

And finally, it would be interesting to understand the reasons MIT OCW instructors continue to participate. That is, it would be interesting to understand the benefits and costs instructors receive for continual participation (including updating materials) and not just what they receive for the initial contribution.

There are a variety of areas one could expand from the findings of this study. These include, but are not limited to, investigating the online comment feedback items from a different perspective, tracking collaboration efforts that result from instructors contributing to MIT OCW, deciphering real numbers in student enrollment going up or down due to the availability of course content in MIT OCW, comparing benefits and costs of MIT instructors with those of OCW instructors of different institutions, discovering how to best facilitate instructors updating their materials in MIT OCW, and measuring the results of instructors' reputations being improved or damaged.

On a narrow scope, it would be interesting to go back to the data in the online feedback comments and investigate these responses from the users' (not instructors') points of view. What do users say directly to MIT regarding benefits and costs? Moreover, it would be interesting to investigate when MIT OCW users utilize the term

“course” when they are identifying benefits and costs, do they really mean the course, or are they referring to the materials?

On a medium scope, it would be interesting to investigate MIT OCW's actual impact on course enrollment. There was some ancillary discussion of this by the instructors, that along with increased reputation, their department and courses actually increased in number of students enrolled. Some mentioned this may not be due to MIT OCW, but something else, like the economy. It would be interesting to measure this with varying methods and approaches.

On a broad scope, it would be interesting to compare these MIT OCW instructor findings with those of other OpenCourseWare projects. Do instructors perceive similar benefits and costs? Or is there something singular to MIT? And, how do these benefits and costs to MIT OCW instructors play into the larger open content picture? Hopefully some consensus can be reached as to the general instructor benefits and costs of OpenCourseWare initiatives.

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APPENDICES

Appendix A

Description of Annual Evaluation Reports

There was a total of four Annual Evaluation Reports conducted by the MIT OCW Evaluation Team for years 2003, 2004, 2005, and 2009. These were based on web analytics, online intercept surveys, interviews, online feedback comments, and student surveys.

When the researcher of this study analyzed these four years of reports and raw data, he discovered that the 2004 Report did not include any data regarding perspectives of the MIT OCW contributing instructors. Therefore, data from the 2004 Annual Evaluation Report are not included in this study, except as referred to as being part of the research conducted by and available from the MIT OCW Evaluation Team.

Appendix B

Description of the 2004 MIT OCW Program Evaluation Findings Report

Evaluation

For the full evaluation report and study, please see the 2004 MIT OCW Program Evaluation Findings Report (March 2005).

With 1,250 courses now available, MIT is delivering on the promise of MIT OpenCourseWare. We have already heard from educators and learners around the world that they are benefiting from the materials offered freely and openly on the MIT OCW site.

In order to understand how well MIT OCW is fulfilling its mission -- as well as to establish a thorough and continuous feedback process that guarantees its improvement over time -- we have developed a substantial evaluation program. The evaluation is focused on understanding specifics in three areas of user behavior:

- Access: Who is accessing MIT OCW, what are their profiles (educator, student, self-learner, other), what are their disciplines (or other interests), and where are they located?
- Use: How do educators and learners use MIT OCW and is MIT OCW designed appropriately to facilitate that use? To what extent and in what ways are MIT course materials adopted or adapted for teaching purposes?
- Impact: What effects -- positive or negative, intended or unintended -- are being realized through the use of MIT OCW?

The evaluation was undertaken in October and November 2004. Data collection employed an integrated "portfolio approach," as a combination of methods helped to achieve both breadth and depth in the evaluation: Please note that MIT OCW received significant coverage on the CNN International television magazine program "Global Challenges" in September and October 2004, generating unusually high levels of site access and usage patterns during that period (particularly an unusually high number of first-time visitors to the site):

Web Analytics. Akamai, MIT OCW's Web hosting and content distribution network provider, captures aggregate usage data such as page views, object views and user location. Akamai also offers a more sophisticated analytic tool called SiteWise, which MIT OCW employed starting November 1, 2003. Most Web usage statistics in this report have been drawn from the SiteWise tool, with the notable exception of geographic traffic information, which is drawn from Akamai due to its greater accuracy. Unless otherwise noted, Web statistics for this report cover the period of November 1, 2003 to October 31, 2004.

Online Intercept Surveys. Between October 25 and November 22, 2004, a survey tool invited (via pop-up window) 103,741 of the 253,597 OCW visitors for the period to complete an online survey. Of those prompted, 14,308 people began the survey, and 5,000 completed it fully, with a dropout rate of 60% and an overall completion rate of 4.8%. The sample provides a margin of error of not more than 1.5%. Self-learners -- as opposed to educators and students -- were more likely to complete the survey once started. Geographically, overall completion rates do not vary significantly from distribution of MIT OCW traffic.

Interviews. Interviews were conducted with a small subset of people in various target user groups from different geographies to gather textured qualitative data about the use and impact of MIT OCW. Interviewees were selected from those whose responses sparked the curiosity of the evaluation team. Members of the MIT OCW research team conducted 20 in-depth interviews with willing participants from intercept and supplemental survey respondents, distributed across several target regions (Latin America, China, Sub-Saharan Africa, and the Middle East and North Africa) and educational roles (educators, students and self-learners). The interview questions and protocol are included in Appendix 4 of the MIT OCW Program Evaluation Findings Report. In addition, follow-up interviews with subjects from the 2003 MIT OCW program evaluation were conducted to gather information on how their use of MIT OCW and their attitudes about the impact of the MIT OpenCourseWare project have changed. Candidates were selected from 2003 interview subjects based on geographic distribution, user role, and insightfulness of prior responses.

Site feedback. We have implemented a database to support the processing and analysis of user email feedback. The system includes email feedback collected since October 1, 2003. The feedback system allows users to self-identify role, geographic region, and type of feedback; further, the system supports tagging of email feedback by topic, correlation of feedback to related course sites, and full-text searches of feedback messages. We have contacted users as appropriate to gather additional insight into access, use, and impact. This feedback provides anecdotal insight into the MIT OCW user experience. Unless otherwise noted, email feedback addressed in this evaluation is the 3,722 feedback messages collected from November 1, 2003 to October 31, 2004.

MIT Student Survey. In order to better understand the usefulness of MIT OCW to MIT students as a window into the sustainability of opencourseware projects, MIT OCW surveyed MIT undergraduate students using a Web survey and email invitation. On November 8, 2004, 3,900 upperclass undergraduates were invited to complete the survey; by November 19, 2004, 800 students had begun the survey and 709 had completed it fully, for a dropout rate of 11.1% and an overall completion rate of 18.1%. The margin of error for the results is calculated to be no greater than 3.33%. The text of the student survey is included in Appendix 5 of the MIT OCW Program Evaluation Findings Report.

For more information about these findings, please contact [Steve Carson](#), MIT OCW Senior Strategist.

Appendix C

MIT Faculty Interview Protocol for the 2003 Evaluation Report

Carson, S. (2004). *MIT OpenCourseWare Program Evaluation Findings Report*. Cambridge, MA: Massachusetts Institute of Technology. Available online: http://88.45.224.228/NR/rdonlyres/A91A9DAF-5B0D-4A20-B068-B77D6A5E0E2E/0/10MIT_OCW_EvalFindings.pdf

What is an interview protocol?

Interview guides, or “protocols,” are sets of high-level questions that the team will explore in interviews with research participants. Protocols are not rigid scripts. Rather, they are flexible tools that help researchers guide conversations. Often, research participants share significant perspectives and insights that researchers had not previously contemplated. Aided by the protocols, researchers adapt their inquiry to explore new topics as they arise. A protocol provides a baseline level of consistency across interviews and among researchers. At the same time, it is a living, evolving tool that facilitates thought and invites insight.

Interview objectives and methodology

This protocol was created to guide interviews with MIT faculty about their experience with MIT OCW and about their perceptions of the OpenCourseWare offering. It supports the overall goals and objectives of the 2003 OCW baseline evaluation, as outlined in the OCW evaluation plan. Interviews will be conducted with selected MIT faculty members to gather a textured understanding of how they use the tool and the impact it has on their professional lives. Interviews will provide a richer, deeper understanding of those issues than can be generated through surveys alone.

Interviewees will be selected from among respondents to the MIT faculty survey who indicate a willingness to participate, and whose responses spark the curiosity of the evaluation team. The OCW evaluation team will conduct 4-6 in-depth interviews, with faculty members who have and have not participated in the publication of course materials.

Sections of the protocol

The interviews will cover three main areas, and provide answers to the following questions:

I. Publication experience. What do faculty members think about the publishing process? Is it clear and simple? How could it be improved? What is the level of effort connected to publishing courses? How helpful are the faculty liaisons? Other OCW staff? Do course sites meet faculty expectations, as set through various OCW communications? What are the primary motivations for

participation? Non-participation? Why have some faculty chosen not to publish their course materials using OCW?

II. OCW site usage. How often do MIT faculty access OCW? What are their most common scenarios of use? How well does OCW support those scenarios?

III. OCW as a teaching tool. Do faculty find OCW to be a positive teaching tool? Are faculty satisfied with OCW as a presentation of their pedagogical style or approach? Do faculty use OCW in the course of teaching their own courses? Do they believe that OCW can be used by others to recreate their pedagogical approach?

Notes:

Time allocations (in parentheses) are based on a 60-75 minute interview. They are approximate and intended to provide the interviewer with guideposts for the conversation.

Text in blue represents guidance for the interviewer.

PUBLICATION (25 min)

- Background information (Note: we will have some of this information from the faculty survey responses).
 - Please tell us a little bit about yourself (name, department, research focus, teaching focus, length of time at MIT, career history)
 - What is your experience using educational technologies? What technologies have you used? What Learning Management Systems (Stellar, SloanSpace, WebCT, Blackboard, etc.)? Have your experiences been positive/negative? Why?
- Attitudes toward open sharing of academic materials
 - Publication history
 - How much have you published in peer-reviewed journals?
 - Do you make preprints or postprints of articles available on the web or through other means?
 - Are you aware of—or concerned about—the rights retained by journals that publish your articles? Have you ever asked to have the terms of publication changed for an article to retain particular rights (e.g. digital publication rights)?
 - Use of copyrighted materials
 - Do you regularly use third-party copyrighted materials in your instruction?
 - How are these made available to students? Course pack? Photocopy? Digital copies (via restricted or unrestricted systems)?
 - Do you believe these uses to be in accordance with existing copyright laws?
 - How much do you know about recent changes in copyright law, including the

DMCA and TEACH act?

Open sharing of academic materials

- What is your attitude about the open sharing of academic materials? Has it changed at all through your interactions with OCW?
- Awareness of OCW
 - How did you first learn about OCW?
 - Do you recall early communications about OCW? What did you hear? What were your first impressions of the program, its goals, and its activities?
 - At what point did you begin thinking about publishing your course(s) on OCW? What prompted you to think about it?
- Participation decision
 - What considerations were important to you in thinking about whether or not to publish your course materials?
 - Was there discussion among your colleagues about OCW? What were the lines of conversation and discourse that you heard?
 - What role (if any) did members of the OCW staff play in influencing or affecting your publication decision?
- For non-participants
 - What are your reasons for keeping your course materials off OCW?
 - What might prompt you to change your mind and publish your course materials?
 - Is there anything OCW can do differently to encourage your participation?
- For participants
 - What were your reasons for publishing course material on OCW? How important were the following in helping you make your decision: a desire to support OCW goals? the stipend? professional recognition? Departmental request for participation?
 - What are your impressions of the publication process? Was it clear and simple? What issues did you encounter in the course of publishing materials to OCW? How did you resolve those issues?
 - How well did OCW staff explain the process to you? Who did you turn to with questions? How helpful were the faculty liaisons? The department liaisons? Other OCW staff? How could the publication process be improved?
 - How much time did you devote to preparing your course for publication? How much time would you have spent preparing for the semester anyway, and how much additional time did you spend for OCW?
 - Did the published course site meet your expectations, as set through various OCW communications? Have you done anything to revise your course site after publication? How responsive was the OCW staff in helping you do so?

OCW SITE USAGE (15 min)

- What has prompted your visits to the OCW site? What have you expected to find there? Has the site met those expectations?
- What do you regard as the most useful aspects of OCW? What could OCW do to improve the site and increase its usefulness? What do you see as the biggest hindrances on the site today?
 - Tell me about the last time you solicited course materials — syllabi, readings, problem sets, etc. — from colleagues.
 - What prompted you to do so?
 - What were you looking to learn or do with those materials?
 - Did they satisfy your needs? Why or why not?
 - Do you, or could you imagine, using the OCW site for **curriculum development** in your department? How might OCW help you improve course offerings? What do you see as the limitations of OCW with regard to curriculum development? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW to improve your own **pedagogical practices or techniques**? How might OCW help you develop methods and techniques for teaching particular content? Integrate new course materials? Establish or revise course syllabi? Have you repurposed OCW content to meet your own teaching needs? What do you see as the limitations of OCW as a resource for improving pedagogy? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW as a tool to help you **learn about specific subject matter**? How might OCW help you expand your base of knowledge using published course materials? Re-learn or review materials on specific topics? Might OCW serve as a sort of reference tool for you? What do you see as the limitations of OCW as an educational tool? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW to help you **advise students** on their courses of study? Make learning and teaching more efficient? What do you see as the limitations of OCW as a tool for curricular advising? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW to **advance your research**? Might it help you understand the current state of knowledge in your area?

of research? Connect with colleagues who have similar research interests and research agendas? What do you see as the limitations of OCW as a tool to help you advance your research? What should OCW do to improve its offering in this regard?

IMPACT (10 min)

- OCW as a publication tool (for participators only)
 - What is the impact of OCW as a publication tool? What is the effect on you of making your course materials available to students and colleagues?

- OCW as a teaching tool
 - We are eager to understand the impact of OCW—the difference it makes for educators who access it. Think back over the times you’ve used OCW. Have there been instances when it has made a significant difference in your teaching? Please describe those instances.
 - Are you aware of instances when OCW has made a difference for your colleagues?
 - Do you see opportunities for OCW to develop or evolve so as to become more responsive to your needs?

- OCW overall
 - What other impacts do you imagine OCW having? Within the MIT context? More broadly?

Appendix D

Site User Interview Protocol for the 2005 Evaluation Report

What is an interview protocol?

Interview guides, or “protocols,” are sets of high-level questions that the team will explore in interviews with research participants. Protocols are not rigid scripts. Rather, they are flexible tools that help researchers guide conversations. Often, research participants share significant perspectives and insights that researchers had not previously contemplated. Aided by the protocols, researchers adapt their inquiry to explore new topics as they arise. A protocol provides a baseline level of consistency across interviews and among researchers. At the same time, it is a living, evolving tool that facilitates thought and invites insight.

Interview objectives and methodology

This protocol was created to guide interviews with educators and learners outside of MIT about MIT’s OpenCourseWare offering. It supports the overall goals and objectives of the 2003 OCW baseline evaluation, as outlined in the OCW evaluation plan. Interviews will be conducted with selected users of OCW to gather a textured understanding of how they use the tool and the impact it has on their learning and teaching. Interviews will provide a richer, deeper understanding of those issues than can be generated through other evaluation techniques, including surveys and Web analytics.

Interviewees will be selected from among respondents to the intercept and supplemental surveys who indicate a willingness to participate, and whose responses spark the curiosity of the evaluation team. Interviews will be conducted by the OCW research team as well as by OCW’s partner organizations around the world. The latter will conduct interviews with target users of the site who are hard to reach (due to location, infrastructure constraints, etc.) and/or who require that interviews be conducted in languages other than English. OCW will conduct approx. 30 in-depth interviews, with participants distributed across several target regions (Latin America, Africa, Asia, Eastern Europe, North America) and groups (faculty, students, self-learners).

Note: A small number of interview participants will not be at all familiar with the OCW tool at the time of the interview. For those people, there is a brief Web site exploration session built into the protocol.

Sections of the protocol

In keeping with the evaluation logic model, the interviews will cover three main areas, and provide answers to the following questions:

I. ACCESS. Who is accessing OCW? Are users of the site educators, students, self-learners, or others? What are their disciplines or areas of interest? Where are they located? What are the technical parameters of their connection to OCW? How well does the OCW technical architecture perform in enabling people to access desired content and materials? What is triggering awareness of and access to OCW?

II. USE. What are the general patterns of online use and interaction? How do various types of people in diverse locations use OCW? Is OCW designed appropriately to facilitate their use? To what extent, and in what ways, do users of the site adopt MIT course materials for teaching and learning? How do people use/reuse OCW content offline/outside of OCW?

III. IMPACT. What benefits are being realized through the use of OCW? How does OCW change the experience of teaching and learning for the people who use it? What is the impact of OCW on learning communities? What is the impact of OCW on the open sharing of educational materials?

Addressing issues of Access, Use and Impact requires that we develop a set of lower-level, more specific questions that we will pose to interview participants. This document details those questions. As we undertake the evaluation and learn more about how target users access and use the site and the impact it has on their teaching and learning, we may update the protocol questions. This is a living document, intended to evolve as our knowledge expands.

Notes:

Time allocations (in parentheses) are based on a 60-75 minute interview. They are approximate and intended to provide the interviewer with guideposts for the conversation.

Text in blue represents guidance for the interviewer.

ACCESS (15 min)

- Background information (Note: when interview participants have already completed an intercept or supplemental survey, we may already have this background information, and be able to skip this section).
 - Please tell us a little bit about yourself (name, age, geographic location, educational background)
 - Please describe your role at the university
 - For students: year, course of study, intellectual and extra-curricular interests, educational goals, career goals
 - For faculty: area of specialization, title, length of time at the university, career history and trajectory, research focus

- How often do you visit OCW? How long, approximately, are your visits to the site?
- Web site exploration session (Note: for interviewees with no prior knowledge of the OCW tool only).
 - Please take a few minutes to explore OCW Web site (<http://ocw.mit.edu>). Please review the homepage, and navigate to the site areas that are of most interest to you. (note: allow the interviewee to take ten minutes or so to focus on the site, especially if that person has never visited it).
 - Do any of the course materials here seem relevant to your pursuits?
 - How might you imagine using this site in the future?
 - Please leave the site open and refer to it over the next few minutes, as I ask you more detailed questions...
- Awareness (Note: this section may be of minimal relevance to interviewees with no prior knowledge of the OCW tool).
 - How did you first learn about MIT|OCW?
 - Can you recall other places where you have heard about or seen reference to OCW?
 - Where else would you expect to find information about OCW? (e.g. educational journals, other Web sites, professional publications, etc.)
 - Have you mentioned OCW to others, or referred others to the tool? Why? In what context? How did that person respond to the site?
 - When was the last time you heard someone mention MIT|OCW? In what context?
 - What has prompted your visits to the OCW site? What have you expected to find there? Has the site met those expectations?
 - For non-users who have heard of the site: What has kept you from visiting OCW?
- Technical specifications
 - How do you usually access OCW? From home? Work? School? What internet provider do you typically use to access OCW?
 - What kind of computer do you use? What is your internet browser of choice?
 - Please describe your internet connection (dial-up, broadband, LAN, etc.)
 - Do you ever have technical difficulties accessing OCW? If so, can you describe them? What do you do to fix these problems?
 - Describe the most recent technical difficulty you had connecting to OCW? What was the problem? And how did you solve it?

Use (30 min)

- Scenarios of use—Open-ended (Note: this set of questions is intended to query participants’ use of OCW, with particular attention to the tasks and scenarios that are most important for them. The richest data comes directly from participants’ personal experience of OCW; it is therefore desirable to linger on these few questions, and solicit as much unprompted feedback about how people use the tool as possible).
 - Please recall the last times you visited the OCW Web site. For each visit:
 - What were you trying to do on the site?
 - Were you able to accomplish your desired task?
 - Did you have any problems? What barriers prevented you from completing your task?
 - Were you satisfied with the outcome of your visit to the site? Why or why not?
 - What materials did you take away from the site, if any? How did you use/re-purpose them?
 - Do you plan to visit OCW in the near future? Why? What do you hope to accomplish using the site?
 - What do you regard as the most useful aspects of OCW? What could OCW do to improve the site and increase its usefulness? What do you see as the biggest hindrances on the site today?
- Scenarios of use—Specific (Note: this set of questions is intended to validate and expand upon some of the scenarios of use that we imagine may be of importance, and understand whether, why, and to what degree they apply for individual participants; some areas may have been covered in the section above, and interviewers will use their judgment — and take the participants’ lead — to guide the interview towards the most fertile topics of conversations)

For research topic-focused interviews:

ZIP DOWNLOADS:

- In your survey, you indicated that you had downloaded a course using the “Download this course” function on the site. Tell me about the last time you did so.
 - What prompted you to do so?
 - What were you attempting to accomplish by downloading the materials?
 - Had the course not included an option to download all contents as a zip file, could you have accomplished your goal through other means?

- Were you able to accomplish your goal in downloading the content? Why or why not?
- How useful are the zip downloads for your computer system or internet access conditions? Is it more convenient given your computer and internet access for you to download the entire course or to pick and choose files from within courses? Why? Did you encounter any technical problems while attempting to download the zip file? Have you encountered any technical problems with the site while attempting to do other things?
- In what ways have you used—or can you imagine using—the contents of the zip file you downloaded? How well would you be able accomplish these uses if the course materials were not zipped in a single file?
- What impact has the zip download feature had on your use of MIT OCW content? Have you sought out other courses that include the zip download feature? How has the zip download feature affected your perception of the MIT OCW project?
- If MIT OCW were to solicit voluntary donations to support the ongoing costs of running the site from users downloading zip files, how likely would you be to donate? How would such a solicitation affect your perceptions of the project?

CONTENT MIGRATION:

For general user interviews:

FACULTY ONLY:

- Tell me about the last time you solicited course materials — syllabi, readings, problem sets, etc. — from colleagues.
 - What prompted you to do so?
 - What were you looking to learn or do with those materials?
 - Did they satisfy your needs? Why or why not?
- Do you, or could you imagine, using the OCW site for **curriculum development** at your institution? How might OCW help you improve course offerings? Establish or revise overall departmental organization? What do you see as the limitations of OCW with regard to curriculum development? What should OCW do to improve its offering in this regard?
- Do you, or could you imagine, using OCW to improve your own **pedagogical practices or techniques**? How might OCW help you

develop methods and techniques for teaching particular content? Integrate new course materials? Establish or revise course syllabi? Have you repurposed OCW content to meet your own teaching needs? What do you see as the limitations of OCW as a resource for improving pedagogy? What should OCW do to improve its offering in this regard?

- Do you, or could you imagine, using OCW as a tool to help you **learn about specific subject matter**? How might OCW help you expand your base of knowledge using published course materials? Re-learn or review materials on specific topics? Might OCW serve as a sort of reference tool for you? What do you see as the limitations of OCW as an educational tool? What should OCW do to improve its offering in this regard?
- Do you, or could you imagine, using OCW to help you **advise students** on their courses of study? Make learning and teaching more efficient? What do you see as the limitations of OCW as a tool for curricular advising? What should OCW do to improve its offering in this regard?
- Do you, or could you imagine, using OCW to **advance your research**? Might it help you understand the current state of knowledge in your area of research? Connect with colleagues who have similar research interests and research agendas? What do you see as the limitations of OCW as a tool to help you advance your research? What should OCW do to improve its offering in this regard?
- Do you, or could you imagine, using OCW as a **model of open sharing** in academia? Might it help you envision possibilities for leveraging technology to improve teaching and learning? What do you see as the limitations of OCW as model of open sharing? What should OCW do to improve its offering in this regard?
- What do you think of the format of the OCW course materials? How do you find working with pdfs as opposed to other file formats? What can OCW do to make downloads and learning objects more useful to you?

STUDENTS ONLY:

- Think back to your recent visits to OCW. What prompted them? Have faculty members or other students recommended it to you?
- Do you, or could you imagine, using OCW as a tool to help you **learn about specific subject matter**? How might OCW help you expand your base of knowledge using published course materials? Re-learn or review materials on specific topics? Might OCW serve as a sort of reference tool for you? Have you repurposed OCW content to meet your own learning

needs? What do you see as the limitations of OCW as an educational tool? What should OCW do to improve its offering in this regard?

- Do you, or could you imagine, using OCW to help you **plan your course of study**? Make personal decisions about your academic path? What do you see as the limitations of OCW as a tool for curricular advising? What should OCW do to improve its offering in this regard?
- Do you, or could you imagine, using OCW to **advance your research**? Might it help you understand the current state of knowledge in your area or major? Connect with students and educators who have similar interests? What do you see as the limitations of OCW as a tool to help you advance your research? What should OCW do to improve its offering in this regard?
- What do you think of the format of the OCW course materials? How do you find working with pdfs as opposed to other file formats? What can OCW do to make downloads and learning objects more useful to you?

SELF-LEARNERS ONLY

- Think back to your recent visits to OCW. What prompted them?
- Do you, or could you imagine, using OCW as a tool to help you **learn about specific subject matter**? How might OCW help you expand your base of knowledge using published course materials? Re-learn or review materials on specific topics? Might OCW serve as a sort of reference tool for you? Have you repurposed OCW content to meet your own learning needs? What do you see as the limitations of OCW as an educational tool? What should OCW do to improve its offering in this regard?
- Do you, or could you imagine, using OCW to **advance your personal or professional endeavors**? Might it help you understand the current state of knowledge in your area of interest? Connect with academics who have similar interests? What do you see as the limitations of OCW in this regard? What should OCW do to improve its offering?
- What do you think of the format of the OCW course materials? How do you find working with pdfs as opposed to other file formats? What can OCW do to make downloads and learning objects more useful to you?

IMPACT (30 min)

- We are eager to understand the impact of OCW—the difference it makes for the teachers and learners who access it.

- Think back over the times you've used OCW. Have there been instances when it has made a significant difference in your teaching/learning? Please describe those instances.
 - Are you aware of instances when OCW has made a difference for your friends or colleagues?
 - Do you see opportunities for OCW to develop or evolve so as to become more responsive to your needs?
 - Can you think of instances when OCW has made a difference...
 - In developing course materials and evolving your pedagogical approach
 - In helping you learn about topics within or outside your specific
 - In providing a model for on-line learning
 - Would you recommend OCW to others? To whom and why?
 - What else, in your opinion, can OCW do to get the word out and encourage usage by others?
- MIT is making these course materials freely available for non-commercial educational purposes, and encourages their use according to the “open” license terms in our legal notices page.
 - Have you used or do you expect to use any of the materials or pages from MIT OCW in any courses that you teach or will teach in the near future?
 - Have you shared any of these materials with friends or colleagues?
 - Have you used these materials to establish or engage with specific communities of learning?

Appendix E

MIT Faculty Interview Protocol for the 2005 Evaluation Report

What is an interview protocol?

Interview guides, or “protocols,” are sets of high-level questions that the team will explore in interviews with research participants. Protocols are not rigid scripts. Rather, they are flexible tools that help researchers guide conversations. Often, research participants share significant perspectives and insights that researchers had not previously contemplated. Aided by the protocols, researchers adapt their inquiry to explore new topics as they arise. A protocol provides a baseline level of consistency across interviews and among researchers. At the same time, it is a living, evolving tool that facilitates thought and invites insight.

Interview objectives and methodology

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Interviewees will be selected from among respondents to the MIT faculty survey who indicate a willingness to participate, and whose responses spark the curiosity of the evaluation team. The OCW evaluation team will conduct 4-6 in-depth interviews, with faculty members who have and have not participated in the publication of course materials.

Sections of the protocol

The interviews will cover three main areas, and provide answers to the following questions:

I. Publication experience. What do faculty members think about the publishing process? Is it clear and simple? How could it be improved? What is the level of effort connected to publishing courses? How helpful are the faculty liaisons? Other OCW staff? Do course sites meet faculty expectations, as set through various OCW communications? What are the primary motivations for participation? Non-participation? Why have some faculty chosen not to publish their course materials using OCW?

II. OCW site usage. How often do MIT faculty access OCW? What are their most common scenarios of use? How well does OCW support those scenarios?

III. OCW as a teaching tool. Do faculty find OCW to be a positive teaching tool? Are faculty satisfied with OCW as a presentation of their pedagogical style or approach? Do faculty use OCW in the course of teaching their own courses? Do they believe that OCW can be used by others to recreate their pedagogical approach?

Notes:

Time allocations (in parentheses) are based on a 60-75 minute interview. They are approximate and intended to provide the interviewer with guideposts for the conversation.

Text in blue represents guidance for the interviewer.

PUBLICATION (25 min)

- Background information (Note: we will have some of this information from the faculty survey responses).
 - Please tell us a little bit about yourself (name, department, research focus, teaching focus, length of time at MIT, career history)
 - What is your experience using educational technologies? What technologies have you used? What Learning Management Systems (Stellar, SloanSpace, WebCT, Blackboard, etc.)? Have your experiences been positive/negative? Why?
- Attitudes toward open sharing of academic materials
 - Publication history
 - How much have you published in peer-reviewed journals?
 - Do you make preprints or postprints of articles available on the web or through other means?
 - Are you aware of—or concerned about—the rights retained by journals that publish your articles? Have you ever asked to have the terms of publication changed for an article to retain particular rights (e.g. digital publication rights)?
 - Use of copyrighted materials
 - Do you regularly use third-party copyrighted materials in your instruction?
 - How are these made available to students? Course pack? Photocopy? Digital copies (via restricted or unrestricted systems)?
 - Do you believe these uses to be in accordance with existing copyright laws?
 - How much do you know about recent changes in copyright law, including the DMCA and TEACH act?
 - Open sharing of academic materials

- What is your attitude about the open sharing of academic materials? Has it changed at all through your interactions with OCW?
- Awareness of OCW
 - How did you first learn about OCW?
 - Do you recall early communications about OCW? What did you hear? What were your first impressions of the program, its goals, and its activities?
 - At what point did you begin thinking about publishing your course(s) on OCW? What prompted you to think about it?
- Participation decision
 - What considerations were important to you in thinking about whether or not to publish your course materials?
 - Was there discussion among your colleagues about OCW? What were the lines of conversation and discourse that you heard?
 - What role (if any) did members of the OCW staff play in influencing or affecting your publication decision?
- For non-participants
 - What are your reasons for keeping your course materials off OCW?
 - What might prompt you to change your mind and publish your course materials?
 - Is there anything OCW can do differently to encourage your participation?
- For participants
 - What were your reasons for publishing course material on OCW? How important were the following in helping you make your decision: a desire to support OCW goals? the stipend? professional recognition? Departmental request for participation?
 - What are your impressions of the publication process? Was it clear and simple? What issues did you encounter in the course of publishing materials to OCW? How did you resolve those issues?
 - How well did OCW staff explain the process to you? Who did you turn to with questions? How helpful were the faculty liaisons? The department liaisons? Other OCW staff? How could the publication process be improved?
 - How much time did you devote to preparing your course for publication? How much time would you have spent preparing for the semester anyway, and how much additional time did you spend for OCW?
 - Did the published course site meet your expectations, as set through various OCW communications? Have you done anything to revise your course site after publication? How responsive was the OCW staff in helping you do so?

OCW SITE USAGE (15 min)

- What has prompted your visits to the OCW site? What have you expected to find there? Has the site met those expectations?
- What do you regard as the most useful aspects of OCW? What could OCW do to improve the site and increase its usefulness? What do you see as the biggest hindrances on the site today?
 - Tell me about the last time you solicited course materials — syllabi, readings, problem sets, etc. — from colleagues.
 - What prompted you to do so?
 - What were you looking to learn or do with those materials?
 - Did they satisfy your needs? Why or why not?
 - Do you, or could you imagine, using the OCW site for **curriculum development** in your department? How might OCW help you improve course offerings? What do you see as the limitations of OCW with regard to curriculum development? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW to improve your own **pedagogical practices or techniques**? How might OCW help you develop methods and techniques for teaching particular content? Integrate new course materials? Establish or revise course syllabi? Have you repurposed OCW content to meet your own teaching needs? What do you see as the limitations of OCW as a resource for improving pedagogy? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW as a tool to help you **learn about specific subject matter**? How might OCW help you expand your base of knowledge using published course materials? Re-learn or review materials on specific topics? Might OCW serve as a sort of reference tool for you? What do you see as the limitations of OCW as an educational tool? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW to help you **advise students** on their courses of study? Make learning and teaching more efficient? What do you see as the limitations of OCW as a tool for curricular advising? What should OCW do to improve its offering in this regard?
 - Do you, or could you imagine, using OCW to **advance your research**? Might it help you understand the current state of knowledge in your area of research? Connect with colleagues who have similar research interests and research agendas? What do you see as the limitations of OCW as a tool to help you

advance your research? What should OCW do to improve its offering in this regard?

IMPACT (10 min)

- OCW as a publication tool (for participators only)
 - What is the impact of OCW as a publication tool? What is the effect on you of making your course materials available to students and colleagues?

- OCW as a teaching tool
 - We are eager to understand the impact of OCW—the difference it makes for educators who access it. Think back over the times you’ve used OCW. Have there been instances when it has made a significant difference in your teaching? Please describe those instances.
 - Are you aware of instances when OCW has made a difference for your colleagues?
 - Do you see opportunities for OCW to develop or evolve so as to become more responsive to your needs?

- OCW overall
 - What other impacts do you imagine OCW having? Within the MIT context? More broadly?

Appendix F

Survey for the 2005 MIT OCW Program Evaluation Findings Report

General questions

1. Which of the following activities have you engaged in? (Please check all that apply.)
 - 1.a. Informal sharing of course content (syllabi, assignments, lecture notes, etc.) with other faculty members at MIT.
 - 1.b. Informal sharing of course content (syllabi, assignments, lecture notes, etc.) with other faculty members beyond MIT.
 - 1.c. Open sharing of course content via an unprotected personal web site (not including those on the MIT OpenCourseWare project).
 - 1.d. Informal sharing of preprints or postprints of publications with colleagues.
 - 1.e. Open sharing of preprints or postprints of publications via an unprotected personal web site (not including those on the MIT OpenCourseWare project).
 - 1.f. None of the above.

RESEARCH LOGIC:
Go to question 2

2. Please rate your agreement with the following statements.
 - 2.a. I am comfortable openly sharing my course content online. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 2.b. I am comfortable with others developing course content using my course content that is available online. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 2.c. I am comfortable with student work from my classes being openly shared online with student permission. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 2.d. I am comfortable with audio recordings of my lectures, discussions, and classroom activities being shared openly online. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 2.e. I am comfortable with video recordings of my lectures, discussions, and classroom activities being shared openly online. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 2.f. I am comfortable with the MIT OpenCourseWare project sharing audio content openly online. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 2.g. I am comfortable with the MIT OpenCourseWare project sharing video content openly online. (Strongly agree, Agree, Disagree, Strongly disagree)

RESEARCH LOGIC:
Go to Question 3

3. Which of the following best describes your interactions with the MIT OpenCourseWare (MIT OCW) project?
 - 3.a. I am unaware of MIT OCW.
 - 3.b. I am aware of MIT OCW, but have not visited the site
 - 3.c. I am aware of MIT OCW, but am not contributing/have not contributed content to the site.
 - 3.d. I have visited the MIT OCW site, but have not contributed content.
 - 3.e. I have not visited the MIT OCW site, but am contributing/have contributed content.
 - 3.f. I have both visited the MIT OCW site and am contributing/have contributed content.

RESEARCH LOGIC:
If 3.a., go to Question 28;
If 3.b. or 3.e., go to Question 4;
If 3.c. or 3.d., go to Question 5;
else go to Question 6

Non-visitor question

4. Which of the following best describe reasons why you have not visited the MIT OCW site? (Please check all that apply)
- 4.a. I am unaware of what the site has to offer.
 - 4.b. I do not have time to make use of the site.
 - 4.c. I do not believe the site has content that can support my teaching, research, administrative activities, and/or professional development. Please explain: _____
 - 4.d. Other. Please explain: _____

RESEARCH LOGIC:
Go to question 5

Non-contributor questions

5. What are your reasons for NOT contributing course content to MIT OCW? (Please check all that apply)
- 5.a. I have not been asked to contribute course content to MIT OCW.
 - 5.b. I do not understand the process by which MIT OCW course content is published.
 - 5.c. I do not have time to participate in MIT OCW publication.
 - 5.d. My course content is not sufficiently polished for MIT OCW publication, but I may publish in the future.
 - 5.e. I have heard colleagues describe negative experiences with MIT OCW participation.
 - 5.f. I do not wish to contribute my course content.
 - 5.g. Other. Please explain: _____

RESEARCH LOGIC:
Go to Question 21

Contributor questions

Please provide feedback on your experience in publishing course content through MIT OCW.

6. How many courses do you currently have published on the MIT OCW site?
- 6.a. 0
 - 6.b. 0 (but I am working with the OCWMIT OCW staff to publish one in the near future)
 - 6.c. 1
 - 6.d. 2
 - 6.e. 3
 - 6.f. 4
 - 6.g. 5 or more

RESEARCH LOGIC:
If 6.a., go to Question 28; else go to Question 7

7. Please indicate if your MIT OCW course content contains any of the following. (Please check all that apply)
- 7.a. Course content created by me (or my TA) that was transferred into MIT OCW (not created specifically for MIT OCW).
 - 7.b. Course content created by me (or my TA) specifically for the MIT OCW site.
 - 7.c. Course content created by the MIT OCW staff for the MIT OCW site.
 - 7.d. Course content created by someone other than me, my TA, or the MIT OCW staff.
 - 7.e. Audio recordings of class lectures, discussions, or activities.
 - 7.f. Video recordings of class lectures, discussions, or activities.
 - 7.g. Course content related to a book I plan to publish or have published.

RESEARCH LOGIC:
If 7.g., go to Question 8; else go to Question 9

8. Please describe any impact, positive or negative, your MIT OCW course content has had on your ability to publish your book and/or on sales of your published book.

FREE TEXT: _____

RESEARCH LOGIC:
Go to Question 9

9. Please rate your agreement with the following statements regarding the MIT OCW publishing process.

- 9.a. I understand the process by which course content is published on MIT OCW. (Strongly agree, Agree, Disagree, Strongly disagree)
 9.b. The publishing process is easy. (Strongly agree, Agree, Disagree, Strongly disagree)
 9.c. The MIT OCW staff is responsive. (Strongly agree, Agree, Disagree, Strongly disagree)
 9.d. The MIT OCW staff is helpful. (Strongly agree, Agree, Disagree, Strongly disagree) MIT OCW publication has helped me to improve my course content. (Strongly agree, Agree, Disagree, Strongly disagree)
 9.e. I would be interested in contributing additional content to MIT OCW. (Strongly agree, Agree, Disagree, Strongly disagree)

RESEARCH LOGIC:
Go to Question 10

10. Please estimate the amount of time you spent preparing a single course's content for publication on MIT OCW beyond the time you would have normally put in to develop that content for your course.

- 10.a. Less than 5 hours.
 10.b. 5-10 hours.
 10.c. 11-20 hours.
 10.d. Over 20 hours.

RESEARCH LOGIC:
Go to Question 11

11. Do you think that MIT OCW should be changed in any way to improve the process of publishing course content?

- 11.a. No.
 11.b. Yes. Please explain: _____

RESEARCH LOGIC:
Go to Question 12

12. Please rate your agreement with the following statements.

- 12.a. Before contributing to MIT OCW, I was interested in using openly licensed or public domain course content as opposed to proprietary content. (Strongly agree, Agree, Disagree, Strongly disagree)
 12.b. Before contributing to MIT OCW, I was interested in publishing in open access journals (journals that make their content freely available on the web). (Strongly agree, Agree, Disagree, Strongly disagree)
 12.c. Before contributing to MIT OCW, I was interested in openly sharing scientific/scholarly tools such as data sets and research materials. (Strongly agree, Agree, Disagree, Strongly disagree)
 12.d. Before contributing to MIT OCW, I was interested in developing/using open alternatives to commercial text books. (Strongly agree, Agree, Disagree, Strongly disagree)

RESEARCH LOGIC:
Go to Question 13

13. Please rate your agreement with the following statements regarding change in behavior since contributing to MIT OCW.

- 13.a. I use openly licensed or public domain course content more (as opposed to proprietary course content). (Strongly agree, Agree, Disagree, Strongly disagree)

- 13.b.I publish in open access journals more (journals that make their content freely available on the web). (Strongly agree, Agree, Disagree, Strongly disagree)
- 13.c.I openly share scientific/scholarly tools (such as data sets and research materials) more. (Strongly agree, Agree, Disagree, Strongly disagree)
- 13.d.I develop/use open alternatives to commercial text books more. (Strongly agree, Agree, Disagree, Strongly disagree)

*RESEARCH LOGIC:**Go to Question 14*

14. Please estimate the number of e-mails regarding your MIT OCW course content that you receive directly in your MIT e-mail account each month from OUTSIDE the MIT community.
- 14.a. 0
14.b. 1-5
14.c. 6-10
14.d. 11-25
14.e. More than 25

*RESEARCH LOGIC:**Go to Question 15*

15. Please rate your agreement with the following statements regarding e-mail you've received from outside the MIT community.
- 15.a. MIT OCW user e-mail has helped me to improve my course content. (Strongly agree, Agree, Disagree, Strongly disagree)MIT OCW user e-mail has demonstrated the value of open sharing to me. (Strongly agree, Agree, Disagree, Strongly disagree)MIT OCW user e-mail has generated professional opportunities for me. (Strongly agree, Agree, Disagree, Strongly disagree)
- 15.b. I welcome MIT OCW user feedback. (Strongly agree, Agree, Disagree, Strongly disagree)
- 15.c. I understand the process by which I notify the MIT OCW staff of unwelcome MIT OCW user e-mail. (Strongly agree, Agree, Disagree, Strongly disagree)

*RESEARCH LOGIC:**Go to Question 16*

16. Please describe any specific professional contacts, opportunities for collaboration, speaking engagements, grant opportunities, feedback that has improved your course content, or any other means of furthering your professional goals that have resulted from publishing your course content on the MIT OCW site.
- FREE TEXT: _____

*RESEARCH LOGIC:**Go to Question 17*

17. Have you taught any course after you published the content from a previous version of that same course on MIT OCW?
- 17.a. Yes
17.b. No

*RESEARCH LOGIC:**If 17.a., go to Question 18; else go to Question 21*

18. Please indicate any ways you have made use of YOUR OWN course content published on the MIT OCW site: (Please check all that apply)
- 18.a. Referred current students to my MIT OCW content.
18.b. Referred colleagues to my MIT OCW content.
18.c. Used my MIT OCW content in preparing for an upcoming course.
18.d. Used my MIT OCW content in the classroom while teaching a subsequent class.
18.e. Other. Please explain: _____

*RESEARCH LOGIC:
Go to Question 19*

19. Please rate your agreement with the following statements regarding the impact of your MIT OCW content on subsequent offerings of the same course that you have taught.
- 19.a. My MIT OCW content has increased attendance in subsequent classes. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 19.b. My MIT OCW content is a valuable supplemental resource for my current students. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 19.c. My enrollment levels have increased in subsequent classes. (Strongly agree, Agree, Disagree, Strongly disagree)
 - 19.d. My MIT OCW content has decreased the effort required to prepare for subsequent classes. (Strongly agree, Agree, Disagree, Strongly disagree)

*RESEARCH LOGIC:
Go to Question 20*

20. Please describe any impact, positive or negative, your MIT OCW content has had on subsequent offerings of the same course that you have taught.

FREE TEXT: _____

*RESEARCH LOGIC:
Go to Question 21*

Use questions

We would like to gather some feedback on your experience using MIT OCW to access and view course content already published (whether your own or others').

21. How have you used MIT OCW? (Please check all that apply)
- 21.a. I have not visited the MIT OCW site.
 - 21.b. Developing or planning curriculum for my department.
 - 21.c. Revising or updating an existing course in my department/program that I have taught before.
 - 21.d. Adapting an existing course that I have NOT taught before.
 - 21.e. Creating a new course for my department/program.
 - 21.f. Learning about a specific subject matter to inform and enhance my teaching activities.
 - 21.g. Finding specific course content for use in courses that I am currently teaching.
 - 21.h. Advising students about their programs of study.
 - 21.i. Advancing research by accessing data and information
 - 21.j. Developing my network of researchers within my area of specialization.
 - 21.k. Other. Please explain: _____

*RESEARCH LOGIC:
If 21.4., go to Question 30; else go to Question 22*

22. Please select the THREE types of course content that are most important to how you use MIT OCW.

- 22.a. Syllabi
- 22.b. Calendars
- 22.c. Reading citations
- 22.d. Full text readings
- 22.e. Lecture notes
- 22.f. Lecture audio
- 22.g. Lecture video
- 22.h. Assignments
- 22.i. Assignment Solutions
- 22.j. Exams
- 22.k. Exam Solutions
- 22.l. Projects
- 22.m. Labs
- 22.n. Tools (e.g. simulations, animations, example code)
- 22.o. Related Links

22.p. Other. Please explain: _____

RESEARCH LOGIC:
Go to Question 23

23. Please rate your agreement with each of the following statements.

- 23.a. MIT OCW has helped or will help me develop my course content. (Strongly agree, Agree, Disagree, Strongly disagree) MIT OCW has helped or will help me in professional activities other than teaching. (Strongly agree, Agree, Disagree, Strongly disagree) MIT OCW has helped or will help students succeed in my courses. (Strongly agree, Agree, Disagree, Strongly disagree) MIT OCW is a valuable resource to people outside the MIT community. (Strongly agree, Agree, Disagree, Strongly disagree)
- 23.b. I am satisfied with the range of content areas and course content available on MIT OCW. (Strongly agree, Agree, Disagree, Strongly disagree)
- 23.c. I am satisfied with the depth of individual course's content. (Strongly agree, Agree, Disagree, Strongly disagree)
- 23.d. I am satisfied with the quality of course content on MIT OCW. (Strongly agree, Agree, Disagree, Strongly disagree) MIT OCW reflects positively on MIT. (Strongly agree, Agree, Disagree, Strongly disagree)

RESEARCH LOGIC:
Go to Question 24

24. Do you think that MIT OCW should be changed in any way to make it more useful and valuable to you?

- 24.a. No
- 24.b. Yes. Please explaining: _____

RESEARCH LOGIC:
Go to Question 25

25. Please describe any specific impact, positive or negative, the MIT OCW site as a whole (rather than just your own course content on MIT OCW) has had on your experience as a faculty member at MIT.

FREE TEXT: _____

RESEARCH LOGIC:
Go to Question 26

26. Please describe any potential impacts, positive or negative, you believe the MIT OCW site may have in the future.

FREE TEXT: _____

RESEARCH LOGIC:
Go to Question 27

27. Is there any additional comment you would like to make?

- 27.a. No
- 27.b. Yes. Please explain: _____

RESEARCH LOGIC:
Go to Question 28

Final question

28. To be eligible for the iPod Nano drawing, you must provide an e-mail address below. We would also like to follow up on selected survey responses by conducting interviews. Please indicate if you are NOT interested in being contacted for a follow-up interview.

FREE TEXT: _____

Research logic
EXIT (End survey)

(Goodbye message will display now.)

Appendix G

MIT OCW Feedback Screen

<http://ocw.mit.edu/OcwWeb/jsp/feedback.jsp?Referer=>

MITOPENCOURSEWARE
MASSACHUSETTS INSTITUTE OF TECHNOLOGY

Home Courses Donate About OCW Help Contact Us Enter search keyword go > Advanced Search

Home > Contact Us Email this page

Contact Us

Please read our [frequently asked questions](#) for answers to common questions including:

- > How do I **register**?
- > Can I **get credit or a certificate** after completing these courses?
- > How can I **download a zipped course**?
- > How can I **download the videos**?

First Name :

Last Name :

*Email Address :

*Educational Role:
--- Select a Role ---

*Geographic Region:
--- Select a Region ---

*Nature of Inquiry :
--- Select Inquiry Type ---

*Comments

SEND FEEDBACK RESET

*required fields

MIT OpenCourseWare will never share your e-mail address with a third party. For more about our serious regard for your privacy, please read our [privacy policy](#).

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OCW CONSORTIUM

Appendix H

Instructor Interview Protocol

- Question 1: How long have you been involved in OpenCourseWare?
- Question 2: How did you find out about OpenCourseWare?
- Question 3: Why did you decide to participate in OpenCourseWare?
- Question 4: What hesitations did you have before participating? How did you overcome them?
- Question 5: What are the benefits from participating in OpenCourseWare?
- Question 6: What are some drawbacks that you perceive for having participated in OpenCourseWare?
- Question 7: How would you categorize these benefits and drawbacks? Which do you feel are the most important? Why?
- Question 8: How do you feel about resources (financial/time) you have received or lost because of participating in OpenCourseWare? ... more grant opportunities, wasted time, easier access to course content, etc.?
- Question 9: What communications have you had that you might not have if it were not for having participated in OpenCourseWare?
- Question 10: How has your reputation been affected (positive and/or negative) because of participating in OpenCourseWare? ... increased class enrollment, poor representation of you actual materials, greater networking and collaboration, more speaking engagements, increased quality in content, negative responses of users of your content, more publications, greater recognition, etc.?
- Question 11: Will you share some of your experiences or stories about OpenCourseWare?
- Question 12: Looking back, if you could choose to contribute your content to OpenCourseWare again, would you? Why, or why not?
- Question 13: What are some features you would like added or removed from MIT OCW? How do you feel about these (ratings, reviews, rankings, alter content within site, etc.)?
- Question 14: Do you use anyone else's course content housed in OpenCourseWare?
- Question 15: Are there benefits you thought you would get and did not? How are the reasons for continuing to participate in MIT OCW different/ the same as the reasons for beginning to participate?
- Question 16: If this were not a funded project, would you still do it? What if funding runs out?
- Question 17: Are there any changes you would have to MIT OCW, like features or functionalities to add, or aspects to remove?
- Question 18: Is there anything you would like to add?

Appendix I

Pilot Study Survey Email

Professor _____,

As a Doctorate student in Instructional Technology I am conducting a study to investigate what instructors feel are the benefits that come to them because of contributing their content to Utah State University OpenCourseWare.

If you are willing to participate in my one question survey, please proceed. If you are also willing to be available for a 20 minute interview, please let me know when you are available, preferably before the Thanksgiving Holiday break. If not, I thank you for your time thus far.

Below, in order, you will find a Letter of Information, Survey Question, and Study Description for this study.

All I would need is a response to this email answering the survey question and letting me know if you are available for an interview. If you have any questions, or need clarification, please ask.

Thank You,

Preston Parker

=====

Letter of Information

Introduction

Professor David Wiley in the Department of Instructional Technology at Utah State University is conducting a research study to find out more about the instructor benefits of Utah State University OpenCourseWare (USU OCW). He will be aided by his research assistant, Preston Parker.

You have been asked to participate because you are a participating instructor in USU OCW. There will be approximately 20 participants from Utah State University. This is qualitative research investigating the feelings and perceptions of the USU OCW instructors.

Procedures

If you agree to this study, the following will happen to you:

You will receive this email explaining the study and soliciting your participation.
 You will respond to the survey question as a reply to this email.
 You will be interviewed if you reply to this email saying you are willing to do so.

Risks

The risks involved in this study are minimal.

Benefits

There may or may not be any direct benefit to you from this study. The researchers, however, may learn more about how instructors feel about benefits of USU OCW. This will likely add to the existing knowledge of USU OCW and will likely improve the project, especially the involvement of the instructors.

Explanation and Offer to Answer Questions

Through this email, Preston Parker has explained this study to you. If you have any questions or research-related problems, you may contact Preston by replying to this email (preston.parker@usu.edu) or by calling 435-787-4078.

Voluntary Nature and Right to Withdraw

Participating in this study is entirely voluntary and you may withdraw at any time without consequence.

Confidentiality

Research records will be kept confidential, consistent with federal and state regulations. Only Professor Wiley and Mr. Parker will have access to the data, which will be kept in a locked file cabinet in a locked room. The response to the survey will be transferred from the email reply to a database; then the email will be deleted. The database will be kept indefinitely but there will be no personal identifiable information of participants. The data gathered will be reported in aggregate.

IRB Approval Statement

The Institutional Review Board (IRB) for the protection of Human Participants at USU has reviewed and approved this research study.

Signature of Subject

By replying to the survey question below (in an email response), you are agreeing to participate in this study.

=====

Survey Question

What benefits do you feel you have received for having contributed your course content to Utah State University OpenCourseWare? (Feel free to itemize, including, perhaps: increased class enrollment, more speaking engagements, more grant opportunities, more writing opportunities, greater networking and collaboration, increased quality in content, easier access to course content, greater recognition, etc.).

=====

Study Description

Five years ago Massachusetts Institute of Technology (MIT) received substantial funding to pursue a project called OpenCourseWare (<http://mit.ocw.edu>). This project aimed to make available, on the Internet, course content from the courses offered at MIT under a license which allowed others to duplicate, use, distribute, and alter the content so long as (1) proper attribution of the original author was made, (2) the content (or altered content) was not commercialized, and (3) any altered content was made available under the same (or similar) license. It was believed that by offering educational content in such a manner that the overall quality and accessibility of content would improve.

Three years after MIT began OpenCourseWare, Utah State University (USU), with its differing strengths and interests as a land-grant university, began a similar OpenCourseWare project (<http://usu.ocw.edu>).

There is great interest in discovering what the risks and benefits are to the instructors who choose to participate in OpenCourseWare. In this study, data regarding the benefits of instructors will be gathered by contacting participating instructors via email and asking them to self-report the benefits they feel they have received from contributing their content to USU OpenCourseWare. They simply report this by responding to the email they received from the researchers. The researchers will also conduct short interviews with instructors who are willing to participate.

The researchers of this study believe that there are benefits that instructors feel they are receiving for having participated in USU OpenCourseWare.

Appendix J

Pilot Study Interview Protocol

1. How did you find out about OpenCourseWare?
2. Why did you decide to participate in OpenCourseWare?
3. What benefits have you received for having participated?
4. How would you categorize these benefits?
5. Which benefits do you feel are the most important? And, why?

Appendix K

Summary of Incentives from Pilot Study

1. Easy of Access to Course Materials for Others:

Instructors like the ability to have a location—especially one that is not password-protected—where students can easily access materials from a course. One instructor who teaches half of her courses online at a distance said, “I spend a lot of time responding to emails from past students who want a hand-out or something that they forgot to print out or they had lost from when they took my course. Because WebCT, or BlackBoard, is password protected, after the semester is over, I can't send them back to the online course, because they no longer can access it. With OpenCourseWare I can simply send them a link to all the course materials and they can get whatever they were asking for. This saves me a lot of time.” This instructor had authored a specific check-list that a publisher requested to include in a textbook. She gave permission and it was published in the next edition. She continues to offer this checklist in OpenCourseWare as well.

As another instructor puts it: “I also really enjoy having a 'permanent place' for my materials that I can always point to for potential students, current students, and professionals interested in my work. It's a great repository.”

2. Avenue to Leave a Legacy:

Instructors realize there is an ability to leave content in a way that others can easily access it and this could be good for continuing on years after a course was taught. One emeritus instructor pointed out that he had “a career's-worth of materials, including textbooks, that I just want to leave for others to use. I want to be remembered.” It is interesting to note that this professor was very successful in his career, even performing on national shows, including the Tonight Show with Johnny Carson. He recognized that OCW offered another way to leave his mark on upcoming generations.

3. Promote Course Materials:

There is a feeling of disapproval with how the current textbook publication process works and who benefits from it. Posting materials in OCW is a way to circumvent this process and by so doing promote your own materials which may get used by others in some way. One instructor said, “Publishers get the money, because their marketing takes a lot of money. I don't think authors make much these days, maybe 2% of purchase price of the textbook, so why not give my textbook away?” This instructor went on to say that he had “practically a textbook online” in OCW by combining his class notes. He gives this away to students because “I want to save the students some money, instead of having them buy a textbook for \$100 that we use 20% of.” He recognizes that a publisher could contact him one day to use these materials, but making money from such an occurrence is not his incentive.

4. Build Reputation of Instructor:

Instructors recognize several ways that participating in OCW adds to their individual and departmental reputation. One instructor said having a course in OCW is “almost like being published, but not quite. It certainly adds to the teaching portion of the portfolio [for promotion and tenure] and some to the service and research portion as well. I can put this on my vita as somewhat equivalent to a paper—like a trade magazine article—not peer-reviewed, but it is a notable way of getting recognized for my online teaching, which is largely ignored.

Another instructor said, “I was at a conference in the Philippines when a colleague used my materials in a presentation and gave me attribution. It made me look a little more important than I actually am.” He continued, “I was at a conference in India when during a department head meeting they asked if any of us had something innovative or cutting edge we were doing. I was able to raise my hand and describe OpenCourseWare and how our department was using it. It made me and my department look good, especially when there were a lot of questions and discussion about it.”

Another instructor shared his apprehension at the beginning and then how he resolved it: “My first concern [when deciding to do OpenCourseWare] was if I were to share works that are not as good as my colleagues, would I be embarrassed? Then I realized my work is good and worth sharing and I could defend it in a body of peers.” This allows quality works to be shared so that quality instructors can be recognized.

Several professors mention they have received emails from around the world from self-learners and other professors preparing their courses, complimenting them on the materials. They recognize, in the same breath, however, that this is nice, but not sure what it would have as a result.

5. Altruism:

There are instructors who just want to give content away for the betterment of humanity and OCW offers such an option. One said he just wants “people to use my materials. I'm interested in the exchange of academic materials online without the copyright restrictions.”

Several instructors succinctly put it as “It [OpenCourseWare] seemed like a good idea.” As one instructor said: “People can engage in life-long learning—a good altruistic idea—and I'm all for it.” As another put it: “I hold a personal interest in trying to make educational resources as widely available to as many people as possible. The more my materials are used and circulated, the more I think it will help me make a difference as an educator and researcher.”

6. Establish a Revenue Stream:

By having content openly available some instructors have created a way of making money that they had not intended nor expected. One instructor shared that a local financial institution found his materials online and wanted to use them in workshops and have him come in as a guest speaker a couple of times throughout the year to add credibility to the materials. They have arranged to compensate him \$1500 per year to do this.

7. Quality of Materials Increases:

Instructors recognize that the simple act of sharing their content openly causes them to take the time to review it and make sure it is good, because if anyone can see it and their names are attached to it they want it to look good.

Also, several pointed out that people alerted them of errors in their materials which they

were able to fix, which would not have happened as seamlessly had the materials not been openly available.

Another instructor mentioned, “It’s really cool to see some ways my materials get used that I have never thought of, maybe even outside of their intended use, but still instructional and useful. It’s like penicillin and bacteria: scientists aren’t looking for the solution, it just happened.” In other words, by having content out there, the likelihood of someone seeing it as a solution to their problem increases.

8. Networking:

Instructors shared many examples of how positive things resulted because of meeting people they likely would not have met without having their materials in OCW. One instructor shared how his materials in OCW were discovered in Mexico by leaders of a higher education institution that were looking for content just like his. They contacted the distance education program of Utah State University and prepared a Memo of Understanding to be able to use the instructor’s materials and give a diploma which has both the Utah State University and the Mexico institution listed on it. He said this program was so successful in only two years that the Mexican Secretary of Education has begun to use his materials. He is excited to see where this leads.

Appendix L

Summary of Disincentives from Pilot Study

1. Dislike How the Materials Appear in OCW:

For various reasons, instructors expressed concern over how their materials appear in OCW. Most of them do not like how they cannot easily update their content. Of this one instructor said, “The way I thought last year, may not be how I think this year. I want some way to convey my updated thoughts to people. Simply labeling the course as Fall of 2005 is not good enough for me. I want people to see what I think now.”

Another perceived problem deals with how intellectual property concerns are handled. If a diagram, for example, cannot be cleared for use from the copyright holder, it must be removed, replaced, or recreated. One instructor was not pleased with how his materials were handled in this regard by the OCW team. He said, “My examples were just removed, with nothing to replace them. I wish this had been discussed with me ahead of time. I would rather the materials not be openly available than to have them incomplete. It makes me look like I don't know what I am talking about, or at least that I don't go into as much depth as I actually do. This doesn't sit well with me. Someone could look at those materials and think it's not that great of a course.” He felt that the OCW team should take the time to make the materials look top quality or not do it at all.

2. Inability to Show How much is Used and which Parts are Used:

Instructors are concerned that it is difficult to track who contributes what parts to a particular piece of content. One instructor explained, “I have to show impact for my tenure application. How do I do that with OpenCourseWare? I don't have problems with people not attributing when they use my materials—at least I don't think there are problems with this—but what happens when someone changes my materials and offers them to others? How do we track who is using what portions of the materials? How do we track impact and satisfaction? This is important to measure when putting together a tenure or promotion application. It's tough to show this. Maybe I can keep a record of emails sent to me about my content from educators worldwide. Or maybe, I can list the publications that reference my online materials. But this doesn't seem feasible now.”

3. Not Being Able to Track How Content is Used:

There was some reservation that it is not easy to follow how content is used. One instructor said, “The ability to reuse the content in an area outside it's intended purpose is worrisome, a little, because its effectiveness might not be as good, but it is still instructional. I'd be interested to know how they use and support it [the use of my materials]. I may be able to offer advice”

Appendix M

Sample Email Exchange Between Researcher and MIT OCW Evaluation Team Leader

Subject: OCW Research Study

Preston Parker <preston.parker@usu.edu>
To: Steve Carson <scarson@mit.edu>

Mon, Aug 31, 2009 at 1:39 PM

Steve,

At long last (at least for me) I have full committee and university approval to conduct my study regarding the benefits to faculty from participating in MIT OpenCourseWare.

What I need to do now (and you requested to be involved in this process) is to contact and secure at least nine faculty who would participate in a focus group interview. I would conduct it from a distance via video conferencing. They would gather in the conference room at the MIT OCW location on the eighth floor (if my memory serves correctly from my visit there). I need a spectrum of faculty, especially regarding original participants, some who have been involved a couple years, and some who are fairly new. The interview should take no more than an hour.

Please let me know what you would like to do to proceed on this.

Thank you,

Preston

Preston Parker <preston.parker@usu.edu>
To: Steve Carson <scarson@mit.edu>

Sun, Sep 20, 2009 at 6:56 PM

Steve,

I'm following up on the email below to make sure you received it.

Thanks,

Preston

Steve Carson <scarson@mit.edu>

Thu, Oct 1, 2009 at 2:45 PM

To: preston.parker@usu.edu

Preston,

Again, sorry to be delayed in getting back to you. I suspect it will be difficult to orchestrate a gathering such as you describe, and we are at a point with OCW where we need to be very careful about our stakeholder engagement. We are rolling out a couple of sustainability programs which have a high risk of faculty adverse reaction, and I am not eager to pile any other requests on top of this. To ask faculty to come over to our office and to coordinate a time when 9 of them can do this at the same time is a fairly tricky thing to arrange.

It would be much easier to handle this as a series of phone interviews, at which I could be in the room and you on the phone. Is this a possibility? I could frame this in part as a follow-up to the faculty survey I am about to distribute. Are there issues we might address using the survey as well?

S

Preston Parker <preston.parker@usu.edu>

Tue, Oct 13, 2009 at 10:44 PM

To: Steve Carson <scarson@mit.edu>

Steve,

Thanks for following up on this...especially with a plan.

I have received approval from my committee for the changes you propose. That is, I can do a series of phone interviews with you in the room instead of the focus group interview. (Frankly, I'm fine with it. The request and idea of doing a focus group came from your team when I met with them in the MIT OCW conference room while I did my site visit and you happened to not be in town. So, if the request to change it comes from your team as well, it feels fine to accept the request.)

I'm not sure this would fit into the current faculty survey. I sent you a list of questions I plan to ask as well as the email I would send to instructors. These are both included below as well. They would need to be changed to reflect phone interviews instead of a focus group, I imagine. And, you could send the emails (which include the study's approved Letter of Information). Maybe you could go through the questions and make a decision regarding fitting into the current faculty survey. I would be interested in interviewing a variety of faculty, even those who may have had a bad experience with MIT OCW.

I will be attending a conference out of town from Oct. 27-31. If we could at least begin these interviews beforehand, that would be great. Let me know.

Thanks,

Preston

=====

LIST OF QUESTIONS:

Question 1: How long have you been involved in OpenCourseWare?

Question 2: How did you find out about OpenCourseWare?

Question 3: Why did you decide to participate in OpenCourseWare?

Question 4: What hesitations did you have before participating? How did you overcome them?

Question 5: What are the benefits from participating in OpenCourseWare?

Question 6: What are some drawbacks that you perceive for having participated in OpenCourseWare?

Question 7: How would you categorize these benefits and drawbacks? Which do you feel are the most important? Why?

Question 8: How do you feel about resources (financial/time) you have received or lost because of participating in OpenCourseWare? ... more grant opportunities, wasted time, easier access to course content, etc.?

Question 9: What communications have you had that you might not have if it were not for having participated in OpenCourseWare?

Question 10: How has your reputation been affected (positive and/or negative) because of participating in OpenCourseWare? ... increased class enrollment, poor representation of you actual materials, greater networking and collaboration, more speaking engagements, increased quality in content, negative responses of users of your content, more publications, greater recognition, etc.?

Question 11: Will you share some of your experiences or stories about OpenCourseWare?

Question 12: Looking back, if you could choose to contribute your content to OpenCourseWare again, would you?

Question 13: What are some features you would like added or removed from MIT OCW? How do you feel about these (ratings, reviews, rankings, alter content within site, etc.)?

Question 14: Do you use anyone else's course content housed in OpenCourseWare?

Question 15: Are there benefits you thought you would get and did not?

Question 16: If this were not a funded project, would you still do it? What if funding runs out?

Question 17: Are there any changes you would have to MIT OCW, like features or functionalities to add, or aspects to remove?

Question 18: Is there anything you would like to add?

EMAIL:

Professor _____,

As a Doctorate candidate in Instructional Technology at Utah State University, I am conducting a study to investigate what instructors feel are the reasons for contributing their content to Massachusetts Institute of Technology OpenCourseWare.

In the annual survey, you mentioned your willingness to be interviewed regarding your involvement in OpenCourseWare. I would now like to set up a time for a 45 minute focus group with you as a participant (to be conducted through video conferencing, phone or Skype). Please let me know when you are available.

Below, in order, you will find a Letter of Information and Study Description for this study.

All I would need is a response to this email, letting me know when you are available for an interview. If you have any questions, or need clarification, please ask.

Thank You,

Preston Parker

=====

Letter of Information

Introduction

Assistant Professor Doug Holton in the Department of Instructional Technology at Utah State University is conducting a research study to find out more about the instructor benefits Massachusetts Institute of Technology OpenCourseWare (MIT OCW). He will be aided by his research assistant, Preston Parker. This is qualitative research investigating the feelings and perceptions of the MIT OCW instructors.

You have been asked to participate in this study because you are a participating instructor in MIT OCW. You also responded in the latest MIT OCW evaluation survey that you would be willing to be contacted for a follow-up interview. The final evaluation report based on those surveys will also be used as part of this study as part of a content analysis. MIT has given approval to use this existing content. There will be approximately six participants from MIT in this focus group interview.

Procedures

If you agree to this study, the following will happen to you:

You will receive this email explaining the study and soliciting your participation. You will participate in a focus group interview, if you reply to this email saying you are willing to do so.

Risks

The risks involved in this study are minimal.

Benefits

There may or may not be any direct benefit to you from this study. The researchers, however, may learn more about how instructors feel about reasons for participating in MIT OCW. This will likely add to the existing knowledge of MIT OCW and will likely improve the project, especially the involvement of the instructors.

Explanation and Offer to Answer Questions

Through this email, Preston Parker has explained this study to you. If you have any questions or research-related problems, you may contact Preston by replying to this email (preston.parker@usu.edu) or by calling 435-787-4078.

Voluntary Nature and Right to Withdraw

Participating in this study is entirely voluntary and you may withdraw at any time without consequence.

Confidentiality

Research records will be kept confidential, consistent with federal and state regulations. Only Professor Wiley and Mr. Parker will have access to the data, which will be kept in a locked file cabinet in a locked room. The response to the focus group interview will be transferred from the email reply to a database; then the email will be deleted. The database will be kept indefinitely but there will be no personal identifiable information of participants. The data gathered will be reported in aggregate.

IRB Approval Statement

The Institutional Review Board (IRB) for the protection of Human Participants at USU has reviewed and approved this research study.

Signature of Subject

By replying to this email, you are agreeing to participate in this study.

=====

Study Description

In 2002 Massachusetts Institute of Technology (MIT) received substantial funding to pursue a project called OpenCourseWare (<http://mit.ocw.edu>). This project aimed to make available, on the Internet, course content from the courses offered at MIT under a license which allowed others to duplicate, use, distribute, and alter the content so long as (1) proper attribution of the original author was made, (2) the content (or altered content) was not commercialized, and (3) any altered content was made available under the same (or similar) license. It was believed that by offering educational content in such a manner that the overall quality and accessibility of content would improve.

There is great interest in discovering what the risks and benefits are to the instructors who choose to participate in MIT OpenCourseWare. In this study, data regarding the benefits of instructors will be gathered by contacting participating instructors via email and asking them to participate in a focus group interview.

The researchers of this study believe that there are benefits that instructors feel they are receiving for having participated in MIT OpenCourseWare.

=====

Steve Carson <scarson@mit.edu>

Wed, Oct 28, 2009 at 12:10 PM

To: preston.parker@usu.edu

Hey Preston,

So we've gotten the faculty survey up and running and are getting good results in. The results overlap significantly with the questions you've included below, so we'll be able to eliminate some from the interview protocol. I'll have some questions of my own to ask as well. I'll work on contacting a slate of faculty this week or next, with a plan to do the interviews in early November. In the mean time, here is an early cut of the survey data. Please do not use any of the data without my explicit permission.

Best,

Steve

Preston Parker <preston.parker@usu.edu>

Wed, Oct 28, 2009 at 1:00 PM

To: Steve Carson <scarson@mit.edu>

Steve,

Excellent. I see some of the overlaps. Of course, the qualitative data (quotes, stories, etc.) is the most interesting and exciting for my study. I look forward to the follow-up interviews in early November. I'll be sure to ask permission when using any of this data. My committee is on board with the slight change in plans, so we're good there.

Thanks,

Preston

Preston Parker <preston.parker@usu.edu>

Fri, Nov 20, 2009 at 4:06 PM

To: Steve Carson <scarson@mit.edu>

Steve,

What's the update on lining us some interviews? Let me know how I can help.

Thanks,

Preston

Steve Carson <scarson@mit.edu>

Mon, Nov 30, 2009 at 6:49 AM

To: preston.parker@usu.edu

Preston,

We've been working through a really intense period of faculty communication on sustainability issues, and I didn't want to interject this into it. I think realistically we are now looking at January to do these. Sorry for the delay, but I want to ensure that we get a good response. Best thing you could do is look at the survey and your interview protocol and see what we can eliminate from the protocol given the survey data.

Again, sorry for the delay.

Steve

Preston Parker <preston.parker@usu.edu>
To: Steve Carson <scarson@mit.edu>

Mon, Nov 30, 2009 at 11:06 AM

Steve,

I appreciate your response and work on this. Again, I am trusting your judgment on faculty preparedness and availability to do the interviews.

Here is my current plan, then, given what you propose about waiting until January:

I will be analyzing all of my data (the emails you gave me in Filemaker format and the survey results of the last four surveys) and writing my report during the month of December. By January, all I will have left is to do the phone interviews and add that data into the report. After that, by mid-January, I will have a complete draft version of the research report. By the end of January I plan to have the final version that I will submit to my committee.

I don't have a problem with waiting until early January to do the interviews. However, waiting until the end of January would pose a problem for me as I would have to renegotiate with my committee.

A thought: if you have any more emails like the hundreds you sent me, I would love to sort through that qualitative data. I have up until about two years ago...so any new ones over the last two years would benefit the study.

Thanks again,

Preston

Preston Parker <preston.parker@usu.edu>
To: Steve Carson <scarson@mit.edu>

Mon, Dec 21, 2009 at 6:30 PM

Steve,

I'm wanting an updated version of the Filemaker Pro database...the one where you set aside all of the emails from OCW instructors. I know there are more emails added since the last version you gave me access to and I would like to include those in my data analysis.

How should I go about accessing this data?

Thanks,

Preston

Steve Carson <scarson@mit.edu>

Wed, Dec 23, 2009 at 2:26 PM

To: Preston Parker <preston.parker@usu.edu>

i'll send an update in Jan. What is the last dated e-mail you have?

S

Preston Parker <preston.parker@usu.edu>

Wed, Dec 23, 2009 at 3:14 PM

To: Steve Carson <scarson@mit.edu>

Steve,

Great, the sooner the better, as I am literally writing up my findings over the next two weeks of the surveys and archived emails (and then adding in the results of the interviews you and I schedule for January).

I went to download the original Filemaker file that you gave me access to in mid-2005 and I realized (by reviewing email records) that I had decided to contact you for the access information once I received IRB approval. I knew I was not allowed to even look at the data until I had full IRB approval (which I now have), so there was no reason to contact you for access until I had that. So, at this point, I have none of the emails and would appreciate all that you can provide. As agreed, I do not share them with anyone else.

Thanks again, for your assistance with this study.

Preston

Preston Parker <preston.parker@usu.edu>

Tue, Jan 19, 2010 at 8:48 AM

To: Steve Carson <scarson@mit.edu>

Steve,

Just following up on this email. I know things can get lost during/after the holidays.

Thanks,

Preston

Preston Parker <preston.parker@usu.edu>

Wed, Jan 27, 2010 at 1:56 PM

To: Steve Carson <scarson@mit.edu>

Steve,

Could you send me the Filemaker Pro files (or whatever format they are in) of the emails so I can begin my analysis of them? I'd also like to set up faculty interviews soon as well.

Much thanks,

Preston

Steve Carson <scarson@mit.edu>

Wed, Jan 27, 2010 at 1:59 PM

To: preston.parker@usu.edu

Will do, and sorry to have not been in touch. Busy time. Looking at the second half of feb for faculty interviews.

S

Preston Parker <preston.parker@usu.edu>

Wed, Jan 27, 2010 at 5:44 PM

To: Steve Carson <scarson@mit.edu>

Excellent. I look forward to the archived emails you send. My committee is pushing hard to get this study done (which is great). My question about the faculty interviews is: what would be feasible to get done by Feb. 10? Could I do six by then?

Thanks,

Preston

Steve Carson <scarson@mit.edu>
To: preston.parker@usu.edu

Wed, Jan 27, 2010 at 6:13 PM

I really doubt I can do any prior to the middle of February, unfortunately. The OCW Consortium board meets Feb 10-11-12 in Cape Town and I doubt I will be able to get anyone scheduled for next week. I'll try for a few. Have you cut your questions down based on what was asked in the survey?

S

Preston Parker <preston.parker@usu.edu>
To: Steve Carson <scarson@mit.edu>

Tue, Feb 9, 2010 at 12:35 AM

Steve,

Yeah, I've cut the protocol down some. What I sent you is a guide. I don't plan on asking all the questions to everyone. The emails you sent are great. Tons of info....though not a lot from faculty participating in MITOCW (at least that I can tell). Still paints a good picture for my study.

Are we still on for doing some interviews for this month?

Preston

Preston Parker <preston.parker@usu.edu>
To: Steve Carson <scarson@mit.edu>

Sun, Feb 21, 2010 at 12:14 AM

Steve,

How can I help to get the interviews scheduled? I'm aiming to get at least six. This can be done all next week fairly easily I'd imagine. I just need to know what more I can do.

Thanks,

Preston

Stephen E Carson <scarson@mit.edu>
To: "preston.parker@usu.edu" <preston.parker@usu.edu>

Sun, Feb 21, 2010 at 6:22 AM

Preston,

Why don't you look through the survey results and identify faculty you'd be interested in interviewing based on the responses. I'll reach out to them. My schedule is much clearer for the next four weeks or so, so I think this is our window.

Steve Carson
 External Relations Director | MIT OpenCourseWare
 President | OpenCourseWare Consortium
 One Broadway, 8th floor | Cambridge, MA 02142
 Map: <http://tinyurl.com/cbo2kn>

Preston Parker <preston.parker@usu.edu> **Mon, Feb 22, 2010 at 10:09 PM**
 To: Stephen E Carson <scarson@mit.edu>

Yes, I can do that. Would you want me to just give you the quote and you can match it back to ID...or do you want me to tell you the cell number? I don't see any way for me to identify who said what in the raw data you sent in the spreadsheet.

Preston

Stephen E Carson <scarson@mit.edu> **Tue, Feb 23, 2010 at 6:19 AM**
 To: "preston.parker@usu.edu" <preston.parker@usu.edu>

I should be able to work backward from the quote

Steve Carson
 External Relations Director | MIT OpenCourseWare
 President | OpenCourseWare Consortium
 One Broadway, 8th floor | Cambridge, MA 02142
 Map: <http://tinyurl.com/cbo2kn>

Preston Parker <preston.parker@usu.edu> **Wed, Mar 10, 2010 at 2:05 AM**
 To: Stephen E Carson <scarson@mit.edu>

Steve,

Alright, below are the responses I'd like to follow-up on with an interview. Also, below is also the updated email I've crafted to go out to all who are interviewed (the email invitation)...it includes the Letter of Information approved by IRB. I can send this out to the potential faculty members to invite them to do the interview, or you can. Just let me know which you prefer. And, recall that I need a variety of faculty as far as time involved with MIT OCW (long time, a few years, and fairly new). I'm aiming for at least

nine phone interviews of 20 minutes each. I'm glad this is a good window for you...let's get this done :)

Thanks,

Preston

=====
Q21:

"Has been a useful reference when seeking funding for subsequent projects. (five since 2003)"

"Ask me this again next year"

"many new colleagues"

"Dover Publications discovered my textbook on OCW, contacted me, and offered me \$\$ upfront if I gave them permission to publish, which I did. They published my text, supplying much needed copy editing service. And this in no way infringes on the freedom of OCW visitors to access the text on line and print out the same for educational use."

"Seems to have had less impact than I thought."

"I was recently invited to be a co-editor of a web project sponsored by the National Humanities Center: <http://onthehuman.org/> When the Editor-in-chief (Gary Comstock) introduced himself to me, he said that he has been using my materials on OCW for his teaching for several years, and was so impressed by the lecture notes, etc. that he was sure I would make a great addition to the team. I was blown away. I accepted the position and am delighted to be part of the project. Thanks to OCW!"

"In transport phenomena, a number of people have reported using my materials, and I am on an education grant headquartered at Kent State University in part because of OCW. My 3.185 OCW site is the #2 Google hit under "Transport Phenomena", and thanks to OCW I used to have 3 of the top 5 rankings under that search thanks to OCW."

Q24:

"I have had my course materials on the web for a long time. OCW is totally redundant and -- because the updating cycle is so long -- second rate to my primary web publications of courses."

"Essentially no impact. I already use Stellar. The OCW materials are out of date, and had

to have significant material scrubbed so they are not very useful. Also, I think it highly unlikely that a student could get much/anything out of just our OCW materials alone. They do not stand alone without lecture."

"Definitely positive impacts"

"It has been benign but transparent and one-way. Materials flowed to OCW but no impact flowed back (I'm not disappointed, I didn't expect it or attempt to drive things in that direction.)"

"My course syllabi and student work have been on the Web, open to all, since 1996, so OCW did not change my approach. It has led, however, to many more people viewing."

Q26:

"Largely no effect either way. Its primarily a way for students to access old exams in my opinion. I have received a fair amount of unwanted email from students at other universities requesting that I post additional materials. I have no [sic] participated in the videotaping [sic] of lectures- I strongly am opposed to this. If my lectures are videotaped, then I need to change how I teach- I need to make things much more scripted. Im [sic] not going to speak extemporaneously and have what I say put out on the web."

"It has prepared potential sponsors prior to establishing agreements on project scope, output, methodology and costs"

"Basically my view is that OCW has no effect on my teaching at MIT, but is a wonderful service for the world at large."

"OCW levels the playing field: it used to be that some students had access to "bibles" and others didn't, now effectively they all do. The only negative is that some students report that easy access to old homework assignments and solutions sometimes encourages to take short cuts on homework by looking them up where they feel they shouldn't have done so."

=====

Professor _____,

As a Doctorate candidate in Instructional Technology at Utah State University, I am conducting a study to investigate what instructors feel are the reasons for contributing their content to Massachusetts Institute of Technology OpenCourseWare.

In the annual survey, you mentioned your willingness to be interviewed regarding your involvement in OpenCourseWare. I would now like to set up a time for a 20 minute

interview with you (to be conducted through video conferencing, phone or Skype). Please let me know when you are available.

Below, in order, you will find a Letter of Information and Study Description for this study.

All I would need is a response to this email, letting me know when you are available for an interview. If you have any questions, or need clarification, please ask.

Thank You,

Preston Parker

=====
Letter of Information

Introduction

Assistant Professor Doug Holton in the Department of Instructional Technology at Utah State University is conducting a research study to find out more about the instructor benefits of the Massachusetts Institute of Technology OpenCourseWare (MIT OCW). He will be aided by his research assistant, Preston Parker.

You have been asked to participate in this study because you are a participating instructor in MIT OCW. There will be approximately six participants from Massachusetts Institute of Technology. This is qualitative research investigating the feelings and perceptions of the MIT OCW instructors.

Procedures

If you agree to this study, the following will happen to you:

You will receive this email explaining the study and soliciting your participation. You will be interviewed, if you reply to this email saying you are willing to do so.

Risks

The risks involved in this study are minimal.

Benefits

There may or may not be any direct benefit to you from this study. The researchers, however, may learn more about how instructors feel about reasons for participating in MIT OCW. This will likely add to the existing knowledge of MIT OCW and will likely

improve the project, especially the involvement of the instructors.

Explanation and Offer to Answer Questions

Through this email, Preston Parker has explained this study to you. If you have any questions or research-related problems, you may contact Preston by replying to this email (preston.parker@usu.edu) or by calling 435-787-4078.

Voluntary Nature and Right to Withdraw

Participating in this study is entirely voluntary and you may withdraw at any time without consequence.

Confidentiality

Research records will be kept confidential, consistent with federal and state regulations. Only Professor Holton and Mr. Parker will have access to the data, which will be kept in a locked file cabinet in a locked room. The response to the survey will be transferred from the email reply to a database; then the email will be deleted. The database will be kept indefinitely but there will be no personal identifiable information of participants. The data gathered will be reported in aggregate.

IRB Approval Statement

The Institutional Review Board (IRB) for the protection of Human Participants at USU has reviewed and approved this research study.

Signature of Subject

By replying to this email, you are agreeing to participate in this study.

=====

Study Description

In 2002 Massachusetts Institute of Technology (MIT) received substantial funding to pursue a project called OpenCourseWare (<http://mit.ocw.edu>). This project aimed to make available, on the Internet, course content from the courses offered at MIT under a license which allowed others to duplicate, use, distribute, and alter the content so long as (1) proper attribution of the original author was made, (2) the content (or altered content) was not commercialized, and (3) any altered content was made available under the same (or similar) license. It was believed that by offering educational content in such a manner that the overall quality and accessibility of content would improve.

There is great interest in discovering what the costs and benefits are to the instructors who choose to participate in MIT OpenCourseWare. In this study, data regarding the benefits of instructors will be gathered by contacting participating instructors via email and asking them to participate in an interview.

The researchers of this study believe that there are benefits that instructors feel they are receiving for having participated in MIT OpenCourseWare.

Preston Parker <preston.parker@usu.edu>

Thu, Mar 11, 2010 at 11:15 AM

To: Stephen E Carson <scarson@mit.edu>

Steve,

Any questions or clarifications needed on this last email I sent? I want to get these interviews completed before MIT's spring break. They are important enough for me right now that we can schedule them any time and I will rearrange my schedule to accommodate.

Thanks,

Preston

Stephen E Carson <scarson@mit.edu>

Fri, Mar 12, 2010 at 8:57 AM

To: "preston.parker@usu.edu" <preston.parker@usu.edu>

No clarifications needed. I just need to find the time to collate the comments and send out the invites. Should get to it soon.

Steve Carson

External Relations Director | MIT OpenCourseWare

President | OpenCourseWare Consortium

One Broadway, 8th floor | Cambridge, MA 02142

Map: <http://tinyurl.com/cbo2kn>

Preston Parker <preston.parker@usu.edu>

Fri, Mar 12, 2010 at 9:40 AM

To: Stephen E Carson <scarson@mit.edu>

Excellent. If you are sending the invites, then let me know times and I will be prepared for the interviews.

Thanks,

Preston

Preston Parker <preston.parker@usu.edu>
To: Stephen E Carson <scarson@mit.edu>

Tue, Mar 16, 2010 at 12:01 AM

Steve,

I haven't heard back about interviews this week. Just following up so I can help however needed and can schedule them in.

Thanks,

Preston

Preston Parker <preston.parker@usu.edu>
To: Stephen E Carson <scarson@mit.edu>

Wed, Mar 17, 2010 at 4:24 PM

Steve,

Forgive my being antsy, I know you're on top of things...I just see two more days this week to do the interviews and then MIT's Spring Break next week, so I'm getting a little concerned of being able to fit them in before the break. If you could give me an update I'd appreciate it. These interviews are literally the last thing I need to complete my dissertation and deadlines for me hit next week.

Thanks,
Preston

Preston Parker <preston.parker@usu.edu>
To: Stephen E Carson <scarson@mit.edu>

Mon, Mar 22, 2010 at 5:56 PM

Steve,

When we spoke on the phone you mentioned having invites out by Friday or today. I haven't seen anything go out and I need to get these scheduled. I appreciate your being on top of this. I've got a committee looking at deadlines that need to be met and I can't respond to them until these interviews are completed. What is the plan?

Thanks,

Preston

Steve Carson <scarson@mit.edu> **Mon, Mar 22, 2010 at 6:31 PM**
 To: "preston.parker@usu.edu" <preston.parker@usu.edu>

I have correlated the quotes and hope to vet the faculty names through the pub team (need their clearance to contact faculty). Hope to send e-mail out tomorrow am.

Steve Carson
 External Relations Director | MIT OpenCourseWare
 President | OpenCourseWare Consortium
 One Broadway, 8th floor | Cambridge, MA 02142
 Map: <http://tinyurl.com/cbo2kn>

Preston Parker <preston.parker@usu.edu> **Mon, Mar 22, 2010 at 6:47 PM**
 To: Steve Carson <scarson@mit.edu>

Much appreciated. I am available to do interviews any time tomorrow in fact. That would be awesome timing. If names were vetted in the morning, I could do interviews all afternoon, be done...and not have to pursue this further :) Wed, Thurs, and Fri are trickier, though still possible. This is turning out to be a cool study with interesting trends, I think.

Thanks,

Preston

Stephen E Carson <scarson@mit.edu> **Fri, Apr 2, 2010 at 7:58 AM**
 To: "preston.parker@usu.edu" <preston.parker@usu.edu>

Where is your protocol? I'd like to see the questions in advance please.

Steve Carson
 External Relations Director | MIT OpenCourseWare
 President | OpenCourseWare Consortium
 One Broadway, 8th floor | Cambridge, MA 02142
 Map: <http://tinyurl.com/cbo2kn>

Preston Parker <preston.parker@usu.edu> **Fri, Apr 2, 2010 at 8:31 AM**
 To: Stephen E Carson <scarson@mit.edu>

We can change as needed as we go along in the questions. Here's my protocol:

Question 1: How long have you been involved in OpenCourseWare?
 Question 2: How did you find out about OpenCourseWare?

Question 3: Why did you decide to participate in OpenCourseWare?

Question 4: What hesitations did you have before participating? How did you overcome them?

Question 5: What are the benefits from participating in OpenCourseWare?

Question 6: What are some drawbacks that you perceive for having participated in OpenCourseWare?

Question 7: How would you categorize these benefits and drawbacks? Which do you feel are the most important? Why?

Question 8: How do you feel about resources (financial/time) you have received or lost because of participating in OpenCourseWare? ... more grant opportunities, wasted time, easier access to course content, etc.?

Question 9: What communications have you had that you might not have if it were not for having participated in OpenCourseWare?

Question 10: How has your reputation been affected (positive and/or negative) because of participating in OpenCourseWare? ... increased class enrollment, poor representation of you actual materials, greater networking and collaboration, more speaking engagements, increased quality in content, negative responses of users of your content, more publications, greater recognition, etc.?

Question 11: Will you share some of your experiences or stories about OpenCourseWare?

Question 12: Looking back, if you could choose to contribute your content to OpenCourseWare again, would you?

Question 13: What are some features you would like added or removed from MIT OCW? How do you feel about these (ratings, reviews, rankings, alter content within site, etc.)?

Question 14: Do you use anyone else's course content housed in OpenCourseWare?

Question 15: Are there benefits you thought you would get and did not?

Question 16: If this were not a funded project, would you still do it? What if funding runs out?

Question 17: Are there any changes you would have to MIT OCW, like features or functionalities to add, or aspects to remove?

Question 18: Is there anything you would like to add?

Preston Parker <preston.parker@usu.edu>

Thu, Apr 29, 2010 at 1:49 PM

To: Stephen E Carson <scarson@mit.edu>

Steve,

I noticed I missed a phone call from you a week ago. I wanted to check if it had to do with an interview that may have been lined up. I have no record of any more interviews scheduled, though I need to conduct at least three more.

Let me know an update.

Thanks,

Preston

Stephen E Carson <scarson@mit.edu> **Thu, Apr 29, 2010 at 2:04 PM**
To: "preston.parker@usu.edu" <preston.parker@usu.edu>

Preston,

I did conduct the interview with Sally, and will send you the write up, which I plan to write on the plane to Hanoi. I'll be busy all next week at the Consortium meeting there, but in the mean time, you should mine the survey responses for a few more that you are interested in and we'll send out another round of invites.

S

Preston Parker <preston.parker@usu.edu> **Thu, Apr 29, 2010 at 2:15 PM**
To: Stephen E Carson <scarson@mit.edu>

Steve,

Alright, I'll await the write up. I never knew Sally had rescheduled and I was teaching when you called. Had I known a little ahead I could have rearranged scheduling.

When is the end of school year? And, are faculty going to be more difficult or easier to get ahold of after the year ends?

And, we can send out another round of invites later when you're ready.

Preston

Stephen E Carson <scarson@mit.edu> **Thu, Apr 29, 2010 at 3:05 PM**
To: "preston.parker@usu.edu" <preston.parker@usu.edu>

Preston,

Sorry I had thought you were being cc:'d on the scheduling, but it looks like you dropped off. We'll certainly get enough faculty to finish your work, if we have to do phone interviews to get there.

S

Preston Parker <preston.parker@usu.edu> **Fri, Apr 30, 2010 at 1:47 PM**

To: Stephen E Carson <scarson@mit.edu>

Much appreciated.

Preston

Preston Parker <preston.parker@usu.edu>

Wed, May 26, 2010 at 5:20 PM

To: Stephen E Carson <scarson@mit.edu>

Steve,

I haven't seen the write up for Sally's interview yet. I'd like to look over that. What is the timeline/plan for the next round of invites for interviews? They've been going well and I'm mostly concerned about getting 2-4 more.

Thanks,

Preston

Preston Parker <preston.parker@usu.edu>

Wed, Jul 7, 2010 at 12:55 PM

To: Stephen E Carson <scarson@mit.edu>

Steve,

Just following up on this previous email of mine.

Hope the summer is going well.

Thanks,

Preston

Appendix N

List of Quotes Sent by Researcher to MIT Evaluation Team

Q21: Please describe any specific professional contacts, opportunities for collaboration or other means of furthering your professional goals that have resulted from publication of your materials on the OCW site.

"Has been a useful reference when seeking funding for subsequent projects. (five since 2003)"

"Ask me this again next year"

"many new colleagues"

"Dover Publications discovered my textbook on OCW, contacted me, and offered me \$\$ upfront if I gave them permission to publish, which I did. They published my text, supplying much needed copy editing service. And this in no way infringes on the freedom of OCW visitors to access the text on line and print out the same for educational use."

"Seems to have had less impact than I thought."

"I was recently invited to be a co-editor of a web project sponsored by the National Humanities Center: <http://onthehuman.org/> When the Editor-in-chief (Gary Comstock) introduced himself to me, he said that he has been using my materials on OCW for his teaching for several years, and was so impressed by the lecture notes, etc. that he was sure I would make a great addition to the team. I was blown away. I accepted the position and am delighted to be part of the project. Thanks to OCW!"

"In transport phenomena, a number of people have reported using my materials, and I am on an education grant headquartered at Kent State University in part because of OCW. My 3.185 OCW site is the #2 Google hit under "Transport Phenomena", and thanks to OCW I used to have 3 of the top 5 rankings under that search thanks to OCW."

Q24: Please describe any impact, positive or negative, your OCW site has had on subsequent courses you've taught.

"I have had my course materials on the web for a long time. OCW is totally redundant and -- because the updating cycle is so long -- second rate to my primary web

publications of courses."

"Essentially no impact. I already use Stellar. The OCW materials are out of date, and had to have significant material scrubbed so they are not very useful. Also, I think it highly unlikely that a student could get much/anything out of just our OCW materials alone. They do not stand alone without lecture."

"Definitely positive impacts"

"It has been benign but transparent and one-way. Materials flowed to OCW but no impact flowed back (I'm not disappointed, I didn't expect it or attempt to drive things in that direction.)"

"My course syllabi and student work have been on the Web, open to all, since 1996, so OCW did not change my approach. It has led, however, to many more people viewing."

Q26: Please describe any additional specific positive or negative impacts OCW has had on your personal teaching or research.

"Largely no effect either way. Its primarily a way for students to access old exams in my opinion. I have received a fair amount of unwanted email from students at other universities requesting that I post additional materials. I have no [sic] participated in the videotaping [sic] of lectures- I strongly am opposed to this. If my lectures are videotaped, then I need to change how I teach- I need to make things much more scripted. Im [sic] not going to speak extemporaneously and have what I say put out on the web."

"It has prepared potential sponsors prior to establishing agreements on project scope, output, methodology and costs"

"Basically my view is that OCW has no effect on my teaching at MIT, but is a wonderful service for the world at large."

"OCW levels the playing field: it used to be that some students had access to "bibles" and others didn't, now effectively they all do. The only negative is that some students report that easy access to old homework assignments and solutions sometimes encourages to take short cuts on homework by looking them up where they feel they shouldn't have done so."

Appendix O

Email Invitation

Professor _____,

As a Doctorate candidate in Instructional Technology at Utah State University, I am conducting a study to investigate what instructors feel are the reasons for contributing their content to Massachusetts Institute of Technology OpenCourseWare.

In the annual survey, you mentioned your willingness to be interviewed regarding your involvement in OpenCourseWare. I would now like to set up a time for a 20 minute interview with you (to be conducted through video conferencing, phone or Skype). Please let me know when you are available.

Below, in order, you will find a Letter of Information and Study Description for this study.

All I would need is a response to this email, letting me know when you are available for an interview. If you have any questions, or need clarification, please ask.

Thank You,

Preston Parker

=====

Letter of Information

Introduction

Assistant Professor Doug Holton in the Department of Instructional Technology at Utah State University is conducting a research study to find out more about the instructor benefits of the Massachusetts Institute of Technology OpenCourseWare (MIT OCW). He will be aided by his research assistant, Preston Parker.

You have been asked to participate in this study because you are a participating instructor in MIT OCW. There will be approximately six participants from Massachusetts Institute of Technology. This is qualitative research investigating the feelings and perceptions of the MIT OCW instructors.

Procedures

If you agree to this study, the following will happen to you:

You will receive this email explaining the study and soliciting your participation. You will be interviewed, if you reply to this email saying you are willing to do so.

Risks

The risks involved in this study are minimal.

Benefits

There may or may not be any direct benefit to you from this study. The researchers, however, may learn more about how instructors feel about reasons for participating in MIT OCW. This will likely add to the existing knowledge of MIT OCW and will likely improve the project, especially the involvement of the instructors.

Explanation and Offer to Answer Questions

Through this email, Preston Parker has explained this study to you. If you have any questions or research-related problems, you may contact Preston by replying to this email (preston.parker@usu.edu) or by calling 435-787-4078.

Voluntary Nature and Right to Withdraw

Participating in this study is entirely voluntary and you may withdraw at any time without consequence.

Confidentiality

Research records will be kept confidential, consistent with federal and state regulations. Only Professor Wiley and Mr. Parker will have access to the data, which will be kept in a locked file cabinet in a locked room. The response to the survey will be transferred from the email reply to a database; then the email will be deleted. The database will be kept indefinitely but there will be no personal identifiable information of participants. The data gathered will be reported in aggregate.

IRB Approval Statement

The Institutional Review Board (IRB) for the protection of Human Participants at USU has reviewed and approved this research study.

Signature of Subject

By replying to this email, you are agreeing to participate in this study.

Study Description

In 2002 Massachusetts Institute of Technology (MIT) received substantial funding to pursue a project called OpenCourseWare (<http://mit.ocw.edu>). This project aimed to make available, on the Internet, course content from the courses offered at MIT under a license which allowed others to duplicate, use, distribute, and alter the content so long as (1) proper attribution of the original author was made, (2) the content (or altered content) was not commercialized, and (3) any altered content was made available under the same (or similar) license. It was believed that by offering educational content in such a manner that the overall quality and accessibility of content would improve.

There is great interest in discovering what the costs and benefits are to the instructors who choose to participate in MIT OpenCourseWare. In this study, data regarding the benefits of instructors will be gathered by contacting participating instructors via email and asking them to participate in an interview.

The researchers of this study believe that there are benefits that instructors feel they are receiving for having participated in MIT OpenCourseWare.

Appendix P

Major Identified Themes

These themes are in no particular order and are followed with my initial thoughts on why a particular theme may be a benefit or a cost to the contributing instructors. These were the themes that had developed based on the themes of the pilot study and after the analysis of the four years' evaluations, but before the analysis of the MIT OCW feedback from the website and before the instructor interviews, and that appeared to be present in the website feedback.:

1. MIT OCW provides helpful supplemental material to high school students.

If instructors' materials are being used by high schoolers, it may help the instructors' reputations. Instructors may like the feeling of being altruistic to self-learners, home schoolers, or along with high school curriculum.

2. MIT OCW provides helpful supplemental material to college students.

If instructors' materials are being used by MIT students, it may help promote the courses for which MIT students would register, which in turn raises the instructors' demand, which helps them in promotion. If college students from other universities are using the materials, the instructors' reputations would be increased to previously untapped populations.

3. MIT OCW gives people an idea of what MIT classes are like when considering attending the university, which could attract more students.

Instructors get more demand on their courses, because they decide to attend MIT, which helps them in promotion.

4. MIT OCW users complain of insufficient course content, problems with links, and web errors, which might be because MIT OCW is costly to upkeep.

This could damage instructors' reputations because the course materials do not adequately nor accurately reflect the actual course content. This could also lead to improving the content because flaws are discovered and reported to the instructor.

5. Students who took the course can offer feedback to the MIT OCW instructor.

This can help improve the course itself, not just improve the content, which will help the instructor improve.

6. MIT OCW helps self-learners, even though it may help the learners very little when applying for school or jobs, because there is no formal degree attached.

Instructors would care about this for altruistic reasons, and maybe some for networking and raise in reputation.

7. MIT OCW benefits users in countries that lack educational resources.

Some instructors may have as part of their professional or institutional agendas or mandates to reach out to developing nations. Instructors would also care about this for altruistic reasons, and maybe some for networking and raise in reputation reasons.

8. People claim MIT OCW is the greatest initiatives to furthering education in general.

If instructors are involved in such an initiative, their reputation would raise.

9. MIT OCW is an effective way for educators everywhere to get ideas and information for teaching certain topics.

Instructors may have increased networking, number of supplemental opportunities, and reputation.

10. Educators express a desire to become involved and participate in MIT OCW.

If instructors are involved in such an initiative, their reputation would raise.

Appendix Q

Bracketing Interview Summary Letter

24 February 2010

To Whom it May Concern:

What follows is a summary of my thoughts and observations during a practice-bracketing interview I did with Preston Parker on Tuesday, February 2, 2010.

Bracketing Interview:

I had planned to ask the Bracketing Interview questions pretty much as they were given to me, but first I asked what OpenCourseWare was. Preston's explanation was concise, to the point, and well articulated—as were also the answers to the other questions—and I must say I was intrigued by the concept, and the interview became far less contrived as I added additional questions on occasion for my benefit. The existing questions made far more sense, and the interview flowed well from one question to the next.

I was left with the general impression that Preston endorses the concept of OpenCourseWare, but that it has been less beneficial to him as a professional than he had anticipated it might be, especially in the areas of networking, collaboration, publication, and recognition. Still, he made it clear that, in his case, the benefits have outweighed the drawbacks. The benefits most perceivable to him were those relative to the increased quality of the content of those materials he has contributed to the program. He believes that any time—and there was a substantial investment of time—and other resources invested by his participation have also been compensated by intangibles, including a better sense of the current state of his discipline and what his place in it might be in the future.

Personal Questions:

Preston has reconciled his core values and religious beliefs with his professional goals and aspirations. He sees few areas of conflict between them. He perceives his profession—and his goal to contribute positively to it—as an important part of the whole, but certainly not the center of his life. He appears to have a clear sense of what are/should be his priorities, and his professional life certainly takes a back seat to his private life. Preston's life includes a generous portion of community service and involvement, and also service and activity within his religious congregation.

So my conclusion is that Preston is an individual who strives for quality in all areas of his life, but he is pragmatic and flexible enough to accept and learn from those moments—

short or extended—when he or others may fall short of his expectations. He does not strike me as someone who acts impulsively, nor is he caught up in imperative or passion. He seems to possess the ability to step back and view himself from a perspective outside himself, and that allows him to look critically and analytically at both his performance and his role within his profession, and more importantly, his performance as father, husband, and member of whatever institutions and organizations with which he affiliates. And those character traits should help him be an effective researcher.

Sincerely,

Kevin Krogh, PhD
Lecturer
Department of Languages Philosophy and Speech Communication
Utah State University

Appendix R

Bracketing Interview Transcript

Kevin Krogh: Alright, Preston, how long have you been involved in OpenCourseWare?

Preston Parker: I've been involved in OpenCourseWare since ... involved peripherally since 2004, involved directly since 2005, and then as an instructor, I have been preparing some of my course materials to be in OpenCourseWare now. I don't have any in OpenCourseWare yet.

KK: Okay, and how did you find out about OpenCourseWare?

PP: I got interested in using open licenses in education. Open licenses really began in the late 70's but it really took off when the Internet came around in the late 90's and early 2000's. I just thought it was really what education needed was to be able to share our materials so that we could build upon each other's work and improve and correct and grow. Every topic—be it Spanish or economics even education itself—we were being hindered by licensing. We were worried about protecting our creations—our Powerpoints or whatever—and that sense of protection was not conducive to progress in my mind. I started going to conferences and talking with other individuals who felt similarly, when someone mentioned, “Have you heard about OpenCourseWare?” probably in about 2003. Yeah, it was 2003, I was at a conference when someone mentioned I ought to go to this particular presentation and learn about it. I went to the presentation and the guy that presented didn't present on OpenCourseWare but he presented on this idea of licensing and opening up education. So, I stuck around and talked with him. At the time, I was in a graduate program at Indiana University and it turned out he was a faculty member at Utah State University. So, I transferred my graduate courses—what I could—to Utah State to work with him on what was to become Utah State University's OpenCourseWare project. At the time, it didn't have a name and it was a research group, but once we got funding, it turned into USU's OpenCourseWare. So that's how I first heard about it and got involved.

KK: Okay, you probably already answered a lot of the next question, but why did you decide to participate in OpenCourseWare?

PP: To participate as an instructor ... I guess because I'm a young faculty member. I guess I can see benefits to OpenCourseWare ... I've talked with faculty, even emeriti faculty and they just want to be remembered. Like, I talked with a music professor at Utah State University and he just wanted to be remembered. He had 30 or 40 years' worth of work that he wanted documented somewhere. But my reason for getting involved was quite the opposite. I'm young faculty, at a research one institution, so getting a national or global reputation carry a lot of weight ... be in

recognition or getting promotions. So, in gaining a reputation OpenCourseWare offered an opportunity I couldn't have found anywhere else. I mean, what else could I have done? ... set up a Blog, send out emails to my network telling them about my blog I just set up? It just wouldn't have had as much weight to it as being able to say, "hey check out my coursework in Utah State's OpenCourseWare project." So I just wanted to get feedback, and recognition from those out there, on what I was doing in my classes.

KK: So, what hesitations did you have before participating and how did you overcome them?

PP: There's always that deep down feeling of "someone's going to steal my stuff." You know, you put it out there, someone uses it, and they get the recognition. I've had it happen. I've had a Powerpoint up that someone took and then went to a presentation and seen it used about 90 percent the same as what I put up, with a different name on it. And, whether they actually used my Powerpoint, it was still like a gut punch. I was like, "hey, I didn't get any credit for that." So, if any hesitation like this existed, I realized that the with open licensing, if that happens, then they are breaking a licensing agreement. I do have recourse. I can say, "Hey, you have to say where you got it from. You didn't, so you are breaking the licensing agreement." So, once you understand the license, there really isn't ... that's not really that big of a problem. You kind of look at it the way that Asian countries look at it, that it's an honor to be imitated, that if someone uses your work they are honoring you by doing it. I've had to learn that ...

KK: ... the highest form of flattery ...

PP: Yeah, that they're imitating my work, they're using my work, so I'll just accept it and keep working. You're not going to get recognition for everything you do. If you get recognition for part of it, then that's fine.

KK: Okay, so what are the benefits from participating in OpenCourseWare?

PP: The benefits that I've seen are networking. I've definitely had networking where I've met people I wouldn't have met. I've collaborated with people, like a conference presentation I did where I wasn't even the principle author of the paper. That was an instructor who I met because she was working on a course, preparing it for OpenCourseWare, and I was helping her. She said, "Do you want to present at a conference?" And, I had never heard of this conference. It was a family finance conference. I had never even heard of it and she was like, "Why don't we collaborate. You talk about OpenCourseWare and I'll talk about the family finance aspect of it." I was like, "Okay." So she wrote the paper. I proofed it. I went through and added a few things here and there. We presented it together and published a paper together and—that was three of four years ago—and people will

still say to me, “are you the guy that ... ?” I stood out, I think because it was a small conference and I had never been there before. So, networking. Other benefits ... I haven't received any direct grant funding or had any money come in that I can think of. I don't think I've had any “higher registration” in any of my classes like other individuals might say. But I have had—as far as a paragraph or a line item in my vita—something that's important, as far as promotion perhaps, that's something different or extra that I'm doing ... kind of fulfilling the service role, that I'm participating in OpenCourseWare.

KK: Okay, how about some of the drawbacks, what are some of the drawbacks that you perceive for having participated in OpenCourseWare?

PP: OpenCourseWare takes time, because you have to prepare your work. What you can say inside a classroom ... I can use a copyrighted video and show a portion of it and that's educational fair use and that's fine. I can do that inside a classroom. But, I can't do that in OpenCourseWare. I don't own that movie, so I can't even show a clip of it in a non-password-protected environment like OpenCourseWare, because, say, Disney would come down hard on me. So, you have to clean the Intellectual Property and that takes time to go through and say, “Alright, do I own this? Or, can I find something that would replace the Disney movie?” I can link out to YouTube clips and I do that sometimes and I show YouTube clips in class, and that's fine. But, to prepare it for OpenCourseWare takes time.

KK: Okay, so how would you categorize these benefits and drawbacks? Which do you feel are the most important and why?

PP: I think the benefits outweigh the drawbacks. The time that it takes to do OpenCourseWare, to upload and make sure it's accurate—because you don't want someone looking at your material and thinking how bad you are; you want it to look good—but, the time it takes is outweighed but the benefits that come. So, if I were to categorize them I would say the networking outweighs the time that it takes. I don't have a lot of other benefits really ... grants or money that comes in. I haven't had recognition, like in a committee meeting where someone says, “Hey you're doing OpenCourseWare, that's great.” So I'd say the networking is most important, the portfolio boost is the next most important, and the time that it takes is not as important as those two.

KK: Okay, you've answered somewhat the next question, but how do you feel about the resources you have received or lost because of participating in OpenCourseWare?

PP: Let's see. I don't feel like I've lost a lot of my Intellectual Property protections. It's not like people steal my stuff all the time. I'm not that good. So resources ... I guess it would be time, but I don't feel like it's lost. I consider it invested. The time I've put into it is time invested. So what was the question again?

KK: For example, have you had easier access to course content because of it? Or, have what other people have done benefited you in improving what you do?

PP: I really haven't used a lot of what other people do. I teach Public Relations. I don't think there's any other OpenCourseWare content in this area. So, I really haven't used other people's work in my classroom, and I don't know if anyone has used any of my work in their classrooms. I've had some emails from people where they say, "Hey, can I use that?" and I just say, "that's fine. Let me know how it goes." What was the first example you gave?

KK: Well I just gave the one example. You talk about wasting time or more opportunities, or ...

PP: Yeah, easier access ... I thought going into this that I would have students—because I've heard that students contact you ... like if you're teaching an online class, and you put up some worksheet or article or something, then after the semester, students can't get access to that online class anymore. They're locked out. So they email you and say, "Hey, can I get access to ... can you send me that worksheet? I never printed it out and I remember it, I just don't have access to it. I heard other instructors say one of the benefits was they could just point those students to their OpenCourseWare class, which is open to anybody, and the students could download it, and it would save them on time. I haven't had that. So, ease of access to materials, I haven't had students contact me and been able to point them to the OpenCourseWare.

KK: Okay, alright, what communications have you had that you might not have had if it were not for having participated in OpenCourseWare?

PP: Like that example I gave with the family finance instructor. That would never had happened if not for OpenCourseWare.

KK: Can you think of any others that you can think of?

PP: No, I can't.

KK: Okay, then how has your reputation been affected, in positive and negative ways, because of participating in OpenCourseWare?

PP: I'd say positively, but not as much as I expected. I expected more people to recognize my work and that there'd be more collaboration that would happen. I think people are just busy and if it's not a direct result for them, it's not worth the collaboration.

KK: But you would say the quality of the content of the course is better?

PP: Yes, the quality of the course content is better because I know other people are going to be looking at it and so I make sure ...

KK: And that might lead to more recognition and more opportunities for exchange of ideas.

PP: Yeah, I've got higher quality content. I spend more time on it. I make sure all the T's are crossed and I's are dotted, kind of a thing. I think over time it will be the students who ... because they will say, "Gosh, I wish I had that table, and I threw it away because I didn't think I'd ever use it again," and two or three years later, they'll go back to the content and use it. I just don't think there's been enough time to find out if that's really the case.

KK: So it might be a whole nother generation of teachers before ...

PP: ... before we recognize any of those benefits.

KK: Okay, well, do you have any other experiences or stories about OpenCourseWare that you'd like to share?

PP: How it's helped my reputation? ... no, I can't think of any more.

KK: Let's go back ... if you were to choose to contribute your content to OpenCourseWare again, would you?

PP: If I were to do it ... right now, probably not, because I'm swamped with classes and it would take too much time to do all that. But, looking back three years ago, knowing what I know now, yeah, I think I would, because the benefits were worth it from having done it then. But if I were to look at it brand new now I would have to question if it's worth the time.

KK: Okay, what are some of the features you'd like to see added or removed from MIT OpenCourseWare?

PP: I would like to be able to update the material easier. So, if I have a Fall 2009 OpenCourseWare course content and we stamp that as Fall 2009 content I would like to be able to hit a button and have all that content pop up and be able to improve upon it so I would be able to add in different things or maybe switch out some movie clip or some article. It's clunky. You have to re-upload everything, start a whole new class and if it were editable from one semester to the next then I could easily change it and save that as the Spring 2010 iteration of that class. And then take that and do the next version. That doesn't exist as far as I know right now. I wish it did.

KK: Okay, do you use anyone else's open content housed in OpenCourseWare?

PP: No.

KK: That's because there's no one else that's in your area.

PP: I've looked. I've looked at MIT, I've looked at Johns Hopkins, I've looked at Notre Dame, BYU ...

KK: And they all have OpenCourseWares?

PP: They all have OpenCourseWares and I can't find any in Public Relations. I've found some in like environmental affairs but that's far enough removed that I can't really use it. And there's some MBA programs, some business coursework that's up, that similar, but it's not like I've been able to use it.

KK: Okay, are there any benefits that you thought you would get that and did not?

PP: Yeah, I thought there'd be more opportunities for me to contact other people and for them to contact me. Even though networking is the biggest thing that's happened with me, the results of networking haven't been what I expected. I expected networking to be able to co-author more articles, to be able to co-author grants. I haven't had any opportunities to write grants. Articles, yeah, I just thought there'd be more of them. Presentations, I've had a few. I thought there'd be more of those as well. So, the results of being able to network more aren't as much as I thought they would be.

KK: Okay, if this were not a funded project, would you still do it?

PP: I would say yes, because I really believe in open licensing. I really believe that as more and more people take advantage of what's available, as more people use open licenses, giving up some of their copyrights, I think the benefits outweigh the costs. That if we share and build upon each other's work—we talk about the Founding Fathers and the Constitution, the copyright clause says, “for the *progress* of arts and sciences, for a limited time, rights would be protected.” I think we've lost sight of that word “progress” and we're protecting copyrights and it's actually hindering progress in the digital world that we live in now. I think that by not protecting copyright so much, is what's going to cause progress to happen. The means have become the ends, in my opinion. Protecting your copyrights and getting compensation were to promote progress. Where now, it has become the end goal: to protect your copyrights so you can get compensation and you're not even worried about progress. So, I think as educators, as we use open licenses, progress will be more likely to happen.

KK: Okay, so, the funding runs out, you're still going to ...

PP: Yeah, I think the benefits are worth it. That by being engaged in OpenCourseWare, the benefits that come, individually and altruistically to the whole, will be worth it.

KK: Are there any changes you would make to MIT OpenCourseWare, like features or functionalities, or aspects to remove?

PP: Yeah, that ability to update, that's the only think I can think of.

KK: Anything you want to remove that's there?

PP: No, because you have the ability to not show your email address or not show your picture. Those are optional, it's not like you're forced.

KK: Last question is a catchall: Is there anything you'd like to add, that we didn't cover in the questions?

PP: I think I threw everything I was thinking about into all the other questions. I can't think of anything. I think funding institutions should still fund it for another three or so years.

KK: Why?

PP: Because we didn't expect this huge economic downturn to happen, which has greatly affected the sustainability programs. Those involved in OpenCourseWare had a lot of models of sustainability could have worked but now with the tightening of the belts and budgets, very few of them could work. The only one that could work right now is that when there's an economic downturn a lot of people go back to college to get advanced degrees. So, if we had OpenCourseWare with advanced degrees, could do exactly what we talked about before: you'd be able to look at a class and decide if you wanted to take the class and then click on a button and sign up and pay for credit for that class and have access to the instructor. So, I would hope that OpenCourseWare projects don't die because of the economic downturn that took effect, because I think—it's not my original idea—I view it in this way: it's like websites. Fifteen years ago, very few colleges had websites. It was like, “You're actually going to invest money in this web thing? It's just a fad. It's going to go away. It's not that big of a deal.” Well now you wouldn't even go to a university if it didn't have a website. I view OpenCourseWare the same way. So, are we going to invest money in this thing?... it's just a fad, it's going to go away. I think eventually, you wouldn't go to a university if they don't have an OpenCourseWare. If they don't give students the ability to look at all the courses. “I want to look at all the courses before I sign up for them. I want to see what we are going to be talking about. And I

want to watch some of the past instructor lectures and look at some of the examples of student work that have been produced and decide if I even want to take that class.” And, if you don't offer that you'll have less people sign up to your class. But I think OpenCourseWare might die because none of the sustainability models will have an opportunity to be put into effect. And, I hope that's not happens. It would be like if there were an economic downturn right when the web came out and we were like, “oh, we're going to just let websites die.” Maybe that's where the analogy breaks apart. I would hope that the funding gets put into place and it's sustainable.

KK: Okay, ready for personal questions?

PP: Sure.

KK: Alright, let's start out by you telling me a little bit about your core values. What are the beliefs and values you were raised with that you still adhere to?

PP: That's interesting you would ask a question about that. I produced a documentary about my family. My Great-great-grandfather moved from England and founded a farm that my Grandma still lives on. And, my dad and his six siblings were raised on this same farm. At the time it was about 200 acres of land that my Great-great-grandfather founded in the 1860's. I interviewed my Grandfather and his two siblings were alive at the time, they have all since passed away, and I interviewed all of them. And, I interviewed my Grandfather's children, so my dad and all of his siblings, having been raised on a farm and one of them has since passed away. So, I interviewed all of them and one of the questions I asked was: what are the values of being raised on the farm? This documentary was about the family farm and the values that came with it. One of them that came out was a work ethic, was “we were taught how to work.” And it was viewed in a positive and negative way. It's definitely a core value I was raised with. I didn't grow up on the farm, but I grew up working on that farm and we lived about three miles away. I would milk cows, swatch alfalfa, stack the hay, and all that goes along with it. There's definitely a work ethic that goes along with that. I was around my father and grandfather enough to know that you worked hard, you played hard—when it's time to work, you work; when it's time to play, you play. Another core value is honesty. My grandfather would say that he didn't like a sneak. If you tried to sneak around him or get away with something, he did not like that. I'm the same way. If my kids try to sneak or get away with something, or get around something by being less than honest, I don't like that. And that's a value I was raised with. What's another core value? ... I guess believing in a higher cause, that everything's going to make sense eventually, because it sure as heck doesn't make sense now. There were enough accidents that happened to those on the farm. There were diseases, cancer ... different things that came into play. This life isn't fair and it never was meant to be fair, so don't expect it to be fair.

KK: So you're saying that your core values are connected to your religious beliefs?

PP: Yeah.

KK: Can you comment on that? How connected, how tight are they? Or, can you maybe separate them?

PP: The belief that there's something higher, that there's something bigger than what's going on here. That connects to my religious values. That I believe there is a God who cares about me and what I'm doing here. Otherwise, really, to me, this is all pointless. Why are we working so hard? Why are we getting an education? And learning, and practicing, and doing, and having families, interacting with each other, if it just ends at death? It just seems pointless to me. There needs to be something more. And, I've seen enough talent born in children that I figure there was something going on before they were born, so there must be something before this life, so there must be something more that goes on after, because it seems like we start this life with a lot more than we should with talent and mental abilities, and even to some extent physical abilities, and then we end this life having progressed so much and learned so much that if it just ends there, it's all pointless. It would be a very depressing life, if that's all there were.

KK: But you say that because you've always had a strong core of religious beliefs. But, don't you believe that there are agnostics, even atheists, out there who have strong values and are able to hold to those values despite the absence something higher?

PP: I've asked that. I've talked with many agnostics and several atheists who have lived lives of what can be considered values and integrity and I've asked them, "Why, what's the point? If there's no judgment day, if there's no evaluation of this life after, then wouldn't you just live this life to get away with whatever you could? If there's no making of everything right, then why? Because it's for the good of fellow man? Because you want to be a good person in this life?" I guess if you recognized that by living certain values you are going to be happier in this life and people will want to support you and you will want to support them more by living those certain values that that makes for a more meaningful life, and that's all there is, I guess I could see that in an agnostic or atheist type person, but that's definitely not enough for me. I guess I look at it a little contrite: that's nice, and it's probably accurate, that you would be happier living certain values, but still this life is not fair and you're going to have trials, and I would want to know there's more. Too often there's times you ask, "Why? Why is this thing happening?" And you may never know why until later on.

KK: Okay, tell me this, outside of your employment, preparation, and education, where do you spend most of your time?

PP: I would spend it with my family. I would play a video game with my son or go to a dance recital with my daughter or go sledding on a hill or build an igloo in our back yard or go swimming with my family—my extended family, meaning my siblings and their children and our parents and my wife's siblings and their children. I don't have a lot of recreation time where I'm not doing something. If I'm not doing employment, preparation, education, or family, I can hardly think of a time that exists where I'm not doing one of those three things.

KK: How about, you belong to an organized religion, and that religion requires time commitments ...

PP: Alright, yeah, there's a big overlap between family and religion.

KK: ... and my question is: is there a conflict at all between things that are required at work, your continuing education, your religion, and your family?

PP: Oh yeah, all the time.

KK: How do you work that out then so that you are not begrudging, for example, the time you give to one when you'd rather give it to the other? How do you balance those things and how does your religion, your faith, your values ...

PP: I've been asked that a lot actually. I'm a member of several different organizations. Like I'm the President of the Social Media Club of Cache Valley. I'm the Chair of the Intellectual Property Committee of a national organization so I get asked, "How do you balance?" And I had to step back and look at that and I realized I don't view it as balancing. If you view it as balancing, then I think your religion and your family always get the short end of the stick. If you're balancing, then you're always going to do your employment and your education, because that's screaming at you to get done. Your boss is screaming at you or your clients are screaming at you. There's always more you can be doing with your employment. So, I guess I don't view it as a balancing act, but what I do is I know that I put my God first and I put my spouse second and everything else after that. So, if God tells me to do something and I feel strongly about that, then it doesn't matter. I'm not going to be begrudged because I can't do a certain thing. I'm going to do what God told me to do, because that's first. Now, if God's not telling me one way or another, which is usually the case for me, then I just go out and do something. Then I look at my spouse, and I view us as a team, when you get married you become one, so I don't view it as *my* employment, *my* education, *I* need to do these things. I view it as *we* are at an employment, *we* are getting an education. I ask my wife all the time, and it isn't always a friendly discussion, sometimes it's a difficult time. She needs her needs met, and women like a lot of time with their husbands. So, the discussion is what do we want? If you need more time with me, then if we make that decision, then that's fine. I'll just make that happen and let's accept the consequences. I might

not get the promotion at work or I might not progress in education as quickly as I could have and that's fine. We make that decision together. It makes education and employment and even religion—I view it as putting God first, which is not the same as putting religion first—because religion sometimes will take a back door to the family. There will be a meeting or something and I can't go because my family needs me and that's okay. But those are now a means to an end. They're not the end. Employment's not the end. Education is not the end. Religion is not the end. What is the end? It's doing what God wants and keeping my family stable and if employment, education, and religion aren't doing those things, then I need to shift them so that they are. So when all these conflicts come up you step back and say, “What achieves the end goal here? And, I'll focus in on that.”

KK: Has your religion or your emphasis on family ever deprived you of a professional opportunity? Can you give examples of where you've had to give up something that might have advanced your career because you felt tied to having to do something with your family or religion?

PP: Yeah, in my employment, there's always some committee you can be on or take some position or teach an extra class that could advance you quicker. But the decision of my priorities especially regarding my profession, I can trace back to a conversation I had with a colleague who I went to grad school with. He went on and became a professor a few years before I got hired and he was a big name, even when he was young. You'd go to conferences and people would be talking about him and how he's doing this project in this country and putting together this and he was publishing papers. He was just a big name. And it was maybe one or two years later that you didn't hear of him. People didn't talk about him anymore. And, I was at a conference, and I pulled him aside and said, “You were so up-and-coming. You were the big name in the field. You've disappeared. What's happened?” And, he looked right at me and said, “I made a conscious decision. I had to decide if I was going to be a great professor and not a very good father, or to be a good professor and a good father. Some people can do both well. I recognized I couldn't. That for me to be what everyone wanted me to be I would have to sacrifice my family. I have five kids, and I want to know my children. So, I decided to be a good professor. I am a good professor. I'm doing what I need to be doing, but I'm not going to be the big expert in the field that everyone wanted me to become. I can't do it, and I'm fine with that.” I left that conversation forever indelible in my mind that if I ever have to decide to be a great whatever it is and I have to sacrifice my family that I would be willing to not do it. And, a lot of people today will speak negatively about him for having made that decision and maybe they do or don't understand that decision. They say, “He could have been the best in the field.”

KK: But they're coming from somewhere else, that you're not coming from, and that's my next question. How do you think your religious beliefs, your faith, your values, influence the way you interact with others, treat others, have an opinion about

others?

PP: I believe in withholding judgment until there's a reason for judging. Everyone has something that they can add. It's very hard to look at someone and not come up with an instant judgment about them. I say that as my ideal, it's what I'd like to be. I still find myself doing those initial judgments and get proven wrong all the time. Let someone have the opportunity to perform before you judge them. In my mind we're all children of the same being and therefore we all have some inherent value, something we can give. What was the question again?

KK: How what you believe affects how you interact with other people, how you treat them, and how you judge them. Do you think you are a better judge of people because of your beliefs? Do you think you are more patient?

PP: Definitely more patient because of what I believe.

KK: Would you say you are slower to react passionately about something?

PP: Positively and negatively, yeah. That probably describes me. Yeah, I'm a lot more willing to withhold my opinion and just let things play out than I used to be. I used to be pretty vocal positively and negatively. I'm not as much now. I'll let people do their thing, to contribute, instead of laying out my course and saying, "It's my way or the highway."

KK: So where do you see yourself in 15-20 years? What would you like to be doing and how would you like to be spending your time?

PP: I still feel like I am so young in my career, that I'm just getting started. I'd like to be doing in 10-15 years more of what I am doing now, to be able to look back and see progress. I'm young enough that 15 years from now, my students are going to be my colleagues. Some will become professors, some will become professionals in the field doing whatever they are going to do. I would hope that we have a strong enough bond that we can still connect and ask each other questions and work on projects together. I definitely want to feel like I've improved the world, improved people's ways of thinking, improved each other.

KK: How about community involvement? What areas do you feel you have an impact in the community?

PP: I would definitely keep involved in my religious organization. I view that as community-oriented. I like volunteer-type opportunities. I mentioned before, the Social Media Club of Cache Valley. That was just an opportunity that came up and I thought of two or three individuals who might be interested so I contacted them. It turned out to be seven of us and we met decide to start our own chapter here in

Cache Valley, and they nominated me to be President because they thought I would be good at delegating. I like opportunities like that, where maybe I can serve on a board and feel like I am helping some sector of the community, even if it's like building a playground or raising food for something. I can't do any medical stuff, because I can't do blood, so I can't contribute that way. I'm not sure I'd do an office, a council member or something like that, unless there was like a big push from a group of people who thought I'd do a good job. I could do it. I've had enough leadership opportunities that I am prepared for something like this. I do own a few businesses and those contribute to the community. I guess my kids' sports games and dance recitals and whatever they were involved in I would probably be involved in as well.

KK: If you had to change your profession, your career, let's say what you're doing is no longer a source of employment for you and you had to retool, retrain, and do something else, what would you do?

PP: So if we were to define my profession as being an instructor at a university, I would probably do what my dad does, but just do a better job at it. He's a farmer who interacts with other farmers to help them be better at what they do, and to help him be better at what he does. I would grow produce on whatever field I could find and I would go onto the Internet and find innovative ways of getting that produce into the hands of those that really want it. There's a high demand now for fresh produce, so I think I could actually make a pretty good living if I did that full-time. My dad has a network where he doesn't need to incorporate technology, but I don't so I would have to. Technology is one of my strengths so I would like to try it out and see how it works.

KK: Okay, one final question: What's your ideal vacation; if you had to spend two weeks somewhere doing something, what would you like to do and where and with whom?

PP: I would go to Washington D.C. And spend two weeks going to every museum and reading everything I could to learn about the history involved in the founding of America and the beliefs and values that Americans have. And I would find somewhere I could sleep in a sleeping bag at night. I'd probably go with my wife, but it would probably change what I do. I know specifically because when we were married just a couple years, we took our son who was a baby at the time. It was a really frustrating time and we stopped right outside the Capital Building on the park on the National Mall with our son in a stroller and she was like, "Why is this so frustrating?" And we had a frank conversation for like an hour or two about what our ideal vacation would be. Her ideal vacation would be sitting on a beach somewhere and not thinking about anything, where if I do that all I end up doing is thinking about everything I ought to be doing back home. No, I'd rather be filling my mind. I'd go crazy just doing nothing. But if I'm reading and learning and not because I have to but because I'm interested and I want to. That feels like a

vacation, a break for me. When to her it just more reading, more museums, and she feels like she has to go places. She just wants to feel like she doesn't have to go places. So, I would go with my wife with the understanding that of those two weeks, a week of it would be doing nothing. That would be my ideal vacation.

KK: Real final question: Is there anything else you want to say?

PP: No, enough's enough on my personal life, I guess.

CURRICULUM VITAE

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EDUCATION

Doctor of Philosophy
 UTAH STATE UNIVERSITY

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Major: Instructional Technology
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Education Specialist
 INDIANA UNIVERSITY

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Major: Instructional Systems Technology
 Minor: Project Management/Production Management
 Thesis: *Learning Production Management When Using Commercial Computer Games as Simulations with Analogous Mappings to Reality*

Master of Arts
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Bloomington, Indiana

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 Emphases: Open Content, Copyright Law, New Media,
 and Multimedia Production
 Thesis: *Open Content Outcry*

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Cum Laude Honor

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 Minors(3): Spanish, Mathematics, and Physics

PROFESSIONAL EXPERIENCE

Teaching Experience

LECTURER contact: Ted Pease Aug, 2008-Present
 Public Relations/ Department Head
 Corporate Communications Program 435-797-3292
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 Utah State University

- full-time faculty member on record for Social Media, Writing, and Research courses
- regularly advise students in their courses of study
- advise students regarding their internships and career plans
- guest lectured in an honors course, presenting my dissertation research
- proposed a new course exclusively on social media, which was accepted by the department

Courses Taught:

JCOM 4530: Special Topics: Social Media	1 Course
JCOM 3320 (online): Strategic Research Methods in Public Relations	1 Course
JCOM 3310: Public Relations Writing	2 Courses
JCOM 3300: Strategic Research Methods in Public Relations	10 Courses
JCOM 3300 (online): Strategic Research Methods in Public Relations	3 Courses
JCOM 2310: Public Relations Writing	11 Courses
JCOM 2310 (online): Public Relations Writing	2 Courses
USU 1010: University Connections	3 Courses

ADJUNCT INSTRUCTOR contact: Michael Sweeney Aug, 2006-Aug, 2008
 Public Relations/ Department Head
 Corporate Communications Program 740-593-2589
 Journalism & Communication Dept. sweenem3@ohio.edu
 Utah State University

- created syllabi and conducted all affairs of the classroom
- taught writing for journalism, public relations, marketing, advertising, and communications
- guest lectured in an honors course, presenting my dissertation research
- incorporated innovative ways of teaching including the use of social media

Courses Taught:

JCOM 2310: Public Relations Writing	3 Courses
JCOM 1130: Beginning Newswriting	6 Courses

TEACHING ASSISTANT contact: Doug Holton Jan, 2008-May 2008
 Instructional Technology Department 435-797-2698
 Utah State University doug.holton@usu.edu

- assisted in all affairs of a Masters-level course: Instructional Design Projects
- taught several class sessions, including preparation of materials and assessment of assignments

TEACHING ASSISTANT contact: Deepak Subramony Aug, 2007-Dec, 2007
 Instructional Technology Department 616- 331-6246
 Utah State University subramod@gvsu.edu

- assisted in all affairs of a Masters-level course: Instructional Technology Foundations
- taught several class sessions, including preparation of materials and assessment of assignments

GUEST LECTURER contact: Deepak Subramony Nov, 2005-Dec, 2005
 Instructional Technology Department 616- 331-6246
 Utah State University subramod@gvsu.edu

- taught Masters-level course sessions while Dr. Subramony was on a research assignment
- had to improvise in Spanish while doing a concurrent video and face-to-face class session

GRADUATE ASSISTANT contact: Kevin Reeve Aug, 2004-Jan, 2006
 Faculty Assistance Center for Teaching 435-797-0783
 Utah State University kevin.reeve@usu.edu

- taught regular workshops to university faculty members
- trained faculty to use media-related computer programs, including course management systems
- designed and developed online university courses and course content

GUEST LECTURER contact: Elizabeth Boling Aug, 2003-May, 2004
 Instructional Systems Technology Dept. 812-856-8467
 Indiana University eboling@indiana.edu

- taught several Masters and Doctorate-level course sessions for Professor Boling
- created the curriculum and evaluation criteria

GRADUATE ASSISTANT contact: Robert Appelman Aug, 2000-Aug, 2002
 Instructional Systems Technology Dept. 812-856-8456
 Indiana University appelman@indiana.edu

- trained faculty and students to use multimedia tools through workshop training sessions
- worked on projects with experts in the field: Drs. Reigeluth, Molenda, Frick, and Pershing
- oversaw functions of the computer lab and multimedia equipment

GRADUATE ASSISTANT contact: Kevin Reeve Jan, 2000-Oct, 2000
 Faculty Assistance Center for Training 435-797-0783
 Utah State University kevin.reeve@usu.edu

- trained Utah State University faculty to use multimedia-related computer programs
- designed, developed, and trained faculty to use online course environments
- assisted in the video production of an *Aegis Award of Excellence*-winning training CD-ROM

PR CONSULTANT contact: Mary Ann Parlin Jan, 2006-Dec, 2009
Cache Valley Specialty Hospital 435-797-4546

- worked with the hospital's PR and Marketing Director and Patient Education Director
- co-authored scripts for video production
- produced a series of award-winning DVDs for patient education and hospital promotion

VIDEO PRODUCER contact: David Higbee Aug, 2009-Sept, 2009
Martin Harris Pageant 435-770-0491
The Church of Jesus Christ of Latter-day Saints dlhigbee@gmail.com

- produced the official DVD for the bi-annual pageant held in Clarkston, Utah
- created the branding for the DVD video and packaging

PR CONSULTANT contact: Larry Hunter Aug, 2006-Aug, 2009
Mountain West Physical Therapy lhunter@cvsh.com

- interviewed the subject matter experts
- co-authored scripts for video production
- directed and produced videos for clinic promotion

VIDEO PRODUCTION MANAGER contact: Suzanne Sanborn Jun, 2002-Jul, 2004
Inquiry Learning Forum 812-856-8216
Center for Research sanborns@indiana.edu
on Learning and Technology
School of Education, Indiana University

- improved the quality of videos and compression by incorporating better video techniques and editing practices while integrating new equipment and software into the process
- doubled the number of video classrooms in half the time projected and expected
- managed the video team and lead the team who trained professional educators

DIRECTOR/PRODUCER/EDITOR contact: Gene Crandall May, 2003-Jan, 2004
New England Short Gun 208-241-3386

- wrote scripts, shot video footage, and edited the final promotional video of a patented product
- handled the online promotion of the video utilizing YouTube and embedding
- contacted companies to negotiate purchase of patent and licensing rights

DVD PRODUCER/EDITOR contact: Jeanette Heidewald Jul, 2001-Jul, 2004
ExcelDV, LLC 812-330-9527

- served as an overall product and process consultant to multimedia productions
- organized live camera shoots, edited digital video, authored DVDs, and created webpages

DIRECTOR ASSISTANT contact: Shane Thomas May, 1998-Oct, 2000
Multimedia and Distance Learning Services 435-797-2655

- assisted in the video production of two *Telly Award*-winning products
- involved in many aspects of shows, live broadcasts, and recording sessions

Business Experience

BUSINESS OWNER Jul, 1998-Present
MultiMediaWise, LLC

- oversee the company affairs, including multimedia production and recruitment of clients
- prepare business plans, sales projections, client pitches and estimates, and marketing campaigns

BUSINESS OWNER Apr, 2004-Present
Parker Produce, LLC

- oversee the company affairs, including planting, harvesting, promoting, and recruiting clients
- oversee activities on the original farm estate that has been in the family for five generations
- prepare business plans, sales projections, client estimates, and marketing campaigns

Non-Profit Experience

FOUNDER AND PRESIDENT contact: Nancy Williams Aug, 2009-Present
Social Media Club of Cache Valley nancy.williams@usu.edu

- lead the board of the organization, including conducting board and member meetings
- oversee delegation of action items to board members
- interact with other community organizations to share philosophy and promote organization

FOUNDER AND PRESIDENT contact: Dave Clark Aug, 2007-Present
Cache Valley Area Investors Association 801-230-8774
david.clark@usu.edu

- lead the board of the organization, including conducting board and member meetings
- oversee delegation of action items to board members
- invite guests to present including entrepreneurs, securities experts, and real estate investors

BRAND MANAGER contact: Ashlee Karren Feb, 2010-Nov, 2010
Friberg Foundation ashlee@ashleekarren.com

- oversaw the branding campaign for a new non-profit organization
- worked with graphic and web designers to establish the overall presence of the organization
- established the social media profiles and plans

RESEARCH and PUBLICATIONS**Refereed Journal Articles**

- Parker, P. P. (In Press). Intellectual Property Rights When Marketing Using Social Media. *TechTrends*, 55(6), 16-18.
- Leary, H. & Parker, P. P. (2011). Fair Use in Face-to-Face Teaching. *TechTrends*, 55(4), 16-18.
- Parker, P. P. (2011). Copyright Future in the Digital World. *TechTrends*, 55(3), 16-18.

- Leary, H. & Parker, P. P. (2010). Academic Author Rights: Knowing is More than Half the Battle. *TechTrends*, 54(3), 23-25.
- Botterbusch, H. R. & Parker, P. P. (2008). Copyright and Collaborative Spaces: Open Licensing and Wikis. *TechTrends*, 52(1), 7-9.
- Parker, P. P. (2008). ect Cornerstone: ECT Internships Open Doors to Leadership Opportunities. *TechTrends*, 52(4), 19.
- 2006 AECT Interns. (2008). Realizing leadership through service learning. *TechTrends*, 52(2), 13. (Contribution 20%)
- 2006 AECT Interns. (2007). ect Cornerstone – Following through: Representing the voice of graduate students. *TechTrends*, 51(6), 14-15. (Contribution 20%)
- 2006 AECT Interns. (2007). ect Cornerstone – Giving back after receiving so much. *TechTrends*, 51(2), 17-18. (Contribution 20%)
- Parker, P. P. & Fender, R. P. (2000). The ECT Foundation: Helping You Make a Difference. *TechTrends*.

Juried Presentations

- Parker, P. P. (2011). *Using Facebook as a Learning Management System*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2011). *Instructor Benefits and Costs of Massachusetts Institute of Technology OpenCourseWare*. The Association for Educational Communications and Technology annual conference.
- Leary, H. & Parker, P. P. (2011). *Fair Use, the TEACH Act and Open Educational Resources for Your Classroom*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2011). *Intellectual Property Committee Update*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2011). *Using Facebook as a Learning Management System*. The Open Education annual conference.
- Parker, P. P. (2011). *Instructor Benefits and Costs of Contributing to MIT's OpenCourseWare*. The Open Education annual conference.
- Parker, P. P. (2010). *Intellectual Property Committee Update*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2009). *Intellectual Property Committee Update*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2009). *Open Content in Education: The Instructor Benefits of OpenCourseWare*. The American Educational Research Association annual meeting.
- Parker, P. P. (2008). *Intellectual Property Committee Update: The use of Open Content and Open Licensing in Education*. The Association for Educational Communications and Technology annual conference.

- Parker, P. P. (2008). *Instructor Benefits of M.I.T.'s OpenCourseWare: A Qualitative Case Study*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2008). *Open Content in Education: The Instructor Benefits of OpenCourseWare*. The American Educational Research Association annual meeting.
- Parker, P. P., (2007). *Instructor Benefits of USU OpenCourseWare*. The Open Education annual conference.
- Parker, P. P. (2007). *Employing Analogous Mappings When Using a Computer Game as a Simulation Intervention in Education*. The Association for Educational Communications and Technology annual conference.
- Talab, R., & Parker, P. P. (2007). *Intellectual Property Committee Update*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2007). *Open Content in Education: The Instructor Benefits of M.I.T.'s OpenCourseWare*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. & Barbour, M. (2007). *Service Learning: The Intern Experience*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2007). *Employing Analogous Mappings When Using a Computer Game as a Simulation Intervention in Education*. The American Educational Research Association annual meeting.
- Parker, P. P. (2006). *Employing Analogous Mappings When Using a Computer Game as a Simulation Intervention in Education*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2006). *Open Content in Education: The Instructor Benefits of M.I.T.'s OpenCourseWare*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2006). *Instructor Benefits of M.I.T. OpenCourseWare*. The Open Education annual conference.
- Parker, P. P. & Johnson, A. (2005). *OpenCourseWare*. The Association of Financial Counseling and Planning Education annual conference.
- Parker, P. P. (2005). *E-commerce Adolescence in Education*. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2005). *Open Content Outcry*. The Association for Educational Communications and Technology annual conference.
- Talab, R., Becker, G., Parker, P. P., & Zang, K. (2005). *Copyright Update: New Developments, Open Source Issues, Blogs, and Teaching Copyright Via Multimedia*. Panel Discussion. The Association for Educational Communications and Technology annual conference.
- Parker, P. P. (2005). *A Typology for Using Computer Games and Simulations in Education*. The Association for Educational Communications and Technology annual conference.

- Parker, P. P. (2004). *Open Content Outcry*. The Association for Educational Communications and Technology annual conference.
- Frick, T., Parker, P. P., & Subramony, D. (2002). *AECT Member Satisfaction: What's Working Well and What's Not?*, The Association for Educational Communications and Technology annual conference.
- Parker, P. P. & Kapke, G. (2001). *Cost-Benefit Analysis: Case Study of the Distance Master of Science Program in the Department of Instructional Systems Technology, Indiana University*. The Association for Educational Communications and Technology annual conference.

Juried Book Chapter

- Parker, P. P. (2006). Learning When Using Commercial Computer Games as Simulations: A Case Study Using a Simulation Game. In Pivec, M. (Ed.), *Affective and Emotional Aspects of Human-Computer Interaction: Game-Based and Innovative Learning Approaches*. IOS Press.

Refereed Conference Proceedings

- Parker, P. P. (2011). *Using Facebook as a Learning Management System*. The Open Education annual conference proceedings.
- Parker, P. P. (2011). *Instructor Benefits and Costs of Contributing to MIT's OpenCourseWare*. The Open Education annual conference proceedings.
- Parker, P. P. (2009). *Open Content in Education: The Instructor Benefits of OpenCourseWare*. The American Educational Research Association annual conference proceedings.
- Parker, P. P. (2008). *Open Content in Education: The Instructor Benefits of OpenCourseWare*. The American Educational Research Association annual conference proceedings.
- Parker, P. P. (2007). *Instructor Benefits of USU OpenCourseWare*. The Open Education annual conference proceedings.
- Parker, P. P. (2007). *Using Computer Games as Simulations in Learning*. The American Educational Research Association annual conference proceedings.
- Parker, P. P. (2006). *Employing Analogous Mappings When Using a Computer Game as a Simulation Intervention in Education*. Association for Educational Communications and Technology annual conference proceedings.
- Parker, P. P. (2006). *Instructor Benefits of M.I.T. OpenCourseWare*. The Open Education annual conference proceedings.
- Parker, P. P. & Johnson, A. (2005). *OpenCourseWare*. The Association of Financial Counseling and Planning Education annual conference proceedings.

- Parker, P. P. (2005). *A Typology for Using Computer Games and Simulations in Education*. The Association for Educational Communications and Technology annual conference proceedings.
- Parker, P. P. (2004). *Open Content Outcry*. The Association for Educational Communications and Technology annual conference proceedings.
- Frick, T., Parker, P. P., & Subramony, D. (2002). *AECT Member Satisfaction: What's Working Well and What's Not?*, The Association for Educational Communications and Technology annual conference proceedings.
- Parker, P. P. & Kapke, G. (2001). *Cost-Benefit Analysis: Case Study of the Distance Master of Science Program in the Department of Instructional Systems Technology, Indiana University*. The Association for Educational Communications and Technology annual conference proceedings. Also available: <http://eric.ed.gov/PDFS/ED470110.pdf>

DIRECTED STUDENT LEARNING and RESEARCH

Awards

Served as the faculty advisor who counseled students one-on-one in their portfolios and presentations for the following well-recognized competitions:

First Place: Richter7 PR Student of the Year for the State of Utah	2011
First Place: Golden Spike PR Student of the Year for the State of Utah	2010
First Place: Richter7 PR Student of the Year for the State of Utah	2010
First Place: Golden Spike PR Student of the Year for the State of Utah	2009

Projects

I served as the faculty advisor for these projects which involved public relations and marketing students.:

American West Heritage Center	2010-2011
Organized, promoted, and staffed the Baby Animal Days event. Conducted research to gauge the success of activities, including a public relations audit, industry analysis, stakeholder analysis, focus group interview, and survey. Wrote final report and made a presentation of findings to the client.	
American Festival Chorus	2010-2011
Assisted the new choir and orchestra in their branding, social media plans, and marketing. Conducted research to determine what the target audience needed and presented the findings and report to the client.	
Utah State University Athletics	2009-2011
Worked with the Senior Associate Athletic Director over Development to establish a plan regarding how to better reach out to alumni and supporters of athletics. This plan involved creating videos of unique stories of athletes and featuring them in an online newsletter and promoting them through social media and other traditional media outlets.	

9-1-1 Guatemala

2010

Created a plan to supply an ambulance to a hospital in La Tinta, Guatemala. Though it began as a one-person, grass-roots effort to find an ambulance, it grew into a new division in the Charity Anywhere Foundation non-profit organization. After a successful six month fund raising campaign, involving benefit concerts and working with municipalities, the team bought a retired ambulance and filled it with medical and hygiene supplies, and thousands of toys. They then drove the stocked ambulance from Idaho to Guatemala and donated it to the hospital. The 15 members of the team, who paid for their own expenses to travel to Guatemala, then constructed a school classroom and a mudslide retention wall. The project placed ten newspaper articles, were featured in a radio interview, created a website, and managed a social media campaign.

Aggie Student Giving

2010

Conducted research to understand the perception and desires of the target audience of the Aggies for Change project, including a public relations audit, industry analysis, stakeholder analysis, focus group interview, and survey. Wrote final report and made a presentation of findings to the client.

USU Emergency Alert System

2010

Undertook a public relations audit, industry analysis, stakeholder analysis, focus group interview, and survey in order to understand the perception and reputation of the client. Wrote final report and made a presentation of findings to the client. One major recommendation was the creation of a recognizable name (Code Blue) for the Emergency Alert System, which was specifically suggested and is now used.

Professional Development

As part of a program called the *Media and Society Lecture Series*, I contact and schedule professionals to do presentations at Utah State University. Following are selected examples:

Trina Patterson Director of Media Relations Alliant Techsystems	Feb, 2011
Mark Shurtleff Attorney General of Utah	Oct, 2009
T.C. Christensen IMAX Filmmaker and Cinematographer	Mar, 2009

I organize a series of morning presentations from various experts in the field of educational communications to a small select group of doctoral students at the annual conferences of the Association for Educational Communications and Technology.:

Dr. J. Ana Donaldson Associate Professor Instructional Technology University of Northern Iowa	Nov, 2011
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- Dr. Michael Hannafin Nov, 2011
 Director, The Learning & Performance Support Laboratory
 Professor, Dept. of Ed. Psychology & Instructional Technology
 University of Georgia
- Dr. J. Michael Spector Nov, 2011
 Professor and Research Scientist
 Learning and Performance Support Laboratory
 LDT Doctoral Program Coordinator
 Educational Psychology and Instructional Technology
 University of Georgia
- Dr. Robert Appelman Nov, 2011
 Clinical Professor
 Instructional Systems Technology Department
 Indiana university
- Dr. Ward Cates Oct, 2010
 Associate Dean
 College of Education
 Lehigh University
- Dr. David Wiley Oct, 2010
 Associate Professor
 Instructional Psychology & Technology Department
 Brigham Young University
- Dr. Charles Reigeluth Oct, 2010
 Professor
 Instructional Systems Technology Department
 Indiana University
- Dr. Andrew Gibbons Oct, 2010
 Department Chair
 Instructional Psychology & Technology Department
 Brigham Young University
- Dr. Michael Hannafin Oct, 2009
 Director, The Learning & Performance Support Laboratory
 Professor, Dept. of Ed. Psychology & Instructional Technology
 University of Georgia
- Dr. David Jonassen Oct, 2009
 Distinguished Professor
 Educational Psychology and Learning Technologies
 University of Missouri
- Dr. Andrew Gibbons Oct, 2009
 Department Chair
 Instructional Psychology & Technology Department
 Brigham Young University

Research

Graduate Research Faculty Advisor
Russ Rampton

Review of literature and application of social media use in university recruitment offices. Likely will grow into a dissertation study.

Undergraduate Research Faculty Advisor
Dave Neumann

Coding of over 30,000 faculty responses to a series of surveys.

SERVICE and TEAM ACTIVITY POSITIONS**University**

FACULTY ADVISOR 2009-Present
True Blue Communication
Utah State University

I presented the concept to students of creating a student-run firm. They felt it was time to begin such a process and they ran with the idea. I oversaw the organization, name selection, and branding of the company. It has since grown into a vibrant organization with many clients and student teams, incorporating several programs across campus.

FACULTY ADVISOR 2009-Present
Film Club
Utah State University

A group of inter-disciplinary major students organized a new university club and asked me to serve as the inaugural faculty advisor. It has become a successful, well-attended organization with activities on campus and in the community.

FACULTY ADVISOR 2008-Present
Mountain West Public Relations Conference
Utah State University

I presented the plan to students of holding a conference focused on public relations that they could claim as their own. So successful was the first conference that they applied for and received national recognition as one of the 11 regional conferences sponsored by the Public Relations Student Society of America. Students, faculty, and professionals from California, Idaho, Nevada, Colorado, and Utah attend what has become a three-day event in Logan, Utah. I am actively involved in contacting and securing keynote speakers and break-out session presenters. I oversee the securing of sponsors and donations which amount to around \$7500 each year to host a successful conference. Because of my efforts, it has become a regular promotional activity—prior to the PR Conference—to have me and several students interviewed live for an hour-long radio show.

CHAPTER FACULTY ADVISOR 2008-Present
 Public Relations Student Society of America
 Utah State University

The USU chapter of PRSSA has been around for years. In the last three years, it has grown to include 10 board members and around 50 chapter members. They organize regular bi-weekly activities, which include inviting professionals to speak and taking trips to Salt Lake City to attend the professional lunch meetings of the closest chapter of the Public Relations Society of America

FACULTY ADVISOR OF MARKETING AND PUBLIC RELATIONS 2007-Present
 Innovation and Entrepreneurship Council (formerly Entrepreneur Club)
 Jon M. Huntsman School of Business
 Utah State University

For the past four years I have advised the entrepreneurship students in their marketing and PR efforts regarding their activities. Most notable is the annual Entrepreneurship Week, which includes the Entrepreneurship Day. We have been creative in the use of social media, traditional media, and motivational events (Guinness World Record breaking, and the Rail Jam). For the last two years, I have served as a judge for the Elevator Pitch Competition during E-Day. Because of my efforts, it has become a regular promotional activity—prior to E-Week—to have me and several students interviewed live for an hour-long radio show.

FACULTY SEARCH COMMITTEE MEMBER 2009-2010
 Journalism and Communication Department
 Utah State University

I served on the committee which selected the next public relations faculty member. I was involved in all aspects from reviewing initial applications to conducting phone interviews to evaluating site visits to recommending the final selection to the department head.

PROPOSAL WRITER 2008-2009
 Journalism and Communication Department
 Utah State University

The department head approached me to do the research and write a proposal for a new online JCOM minor program. After weeks of reviewing other universities and other departments at USU, I prepared the document. It was accepted and the new online program began Fall semester 2009. I was asked to teach some of the first online classes in this program.

COMMITTEE CHAIR OF ACADEMICS 2006-2007
 Instructional Technology Student Association
 Instructional Technology Department
 Utah State University

As a student, I served on the executive board of the graduate student organization in the department.

- VICE PRESIDENT 2005-2006
 Instructional Technology Student Association
 Instructional Technology Department
 Utah State University
- As a student, I served on the executive board of the graduate student organization in the department.
- FACULTY SEARCH COMMITTEE MEMBER 2003-2004
 Department of Telecommunications
 Indiana University
- As a student, I was asked to serve on the committee which selected the next faculty member.
- VOLUNTEER USHER 2003-2004
 Indiana Auditorium
 Indiana University
- I assisted in many full Broadway musicals and productions, for which I received an award.

National

- COMMITTEE MEMBER 2009-Present
 National Social Media Club in Education Committee
- I advise the national Social Media Club on matters including how social media should be taught and handled in higher educational institutions.
- INTERVIEWEE 2009-Present
- I am regularly contacted for interviews from local and national publications and programs in print, web, and radio regarding new technologies, social media, public relations, and marketing. Most recently, I was interviewed by the New York Times Magazine, Logan's Herald Journal, and 610KVNU's For the People and Crosstalk programs.
- CHAPTER GRADUATE STUDENT LIAISON 2007-2008
 Utah State University
 American Educational Research Association
- It was my responsibility to be sure the messages from the national organization were publicized to the students via email.

International

- CO-COORDINATOR 2009-Present
 Educational Communications and Technology Foundation Internship Program
 Association for Educational Communications and Technology

As a recipient of the prestigious Strohbehn Internship Award for which one is given annually to a top Doctoral student, I was qualified and asked to serve as one of the two individuals who organizes the internship program each year. Responsibilities include soliciting applications, organizing the team of raters, selecting the recipients, and facilitating the internship experience at the annual conference of the AECT.

EDITORIAL BOARD 2008-Present
 TechTrends Journal
 Association for Educational Communications and Technology

I serve as the editor of the bi-monthly *Copyright and You* column. I solicit authors and edit their work before submission for publication. Oftentimes, I choose to write the column.

ANNUAL CONFERENCE PAPER PROPOSAL REVIEWER 2007-Present
 Association for Educational Communications and Technology

For several years, I have served as a reviewer of proposals submitted to various divisions for the annual conference.

COMMITTEE MEMBER 2007-Present
 Leadership Development Committee
 Association for Educational Communications and Technology

This committee position allows me to be involved in the training of the current and future leaders by organizing workshops, dinners, presentations, and activities specifically catered to them.

APPLICATION RATER 2007-Present
 Educational Communications and Technology Foundation Internship Program
 Association for Educational Communications and Technology

I have served on a team who determines each year's recipients of the Strohbehn, Johnson, and Cochran interns, top Doctoral student awards.

COMMITTEE CHAIR 2006-Present
 Intellectual Property Committee
 Association for Educational Communications and Technology

The committee members nominated me to lead this committee. I oversee task delegation, committee meetings, and the committee presentations made at the national conference.

COMMITTEE MEMBER 2007-2010
 Nominating Committee
 Association for Educational Communications and Technology

This committee nominates the candidates for various national offices. I was involved in the extensive qualification and vetting process that takes place ahead of time.

- COMMITTEE MEMBER 2007-2010
 Awards Committee
 Association for Educational Communications and Technology
- Each year, at the annual conference, awards are given to deserving students, faculty, and professionals in the areas of publications, contributions to the field, and production. I had the opportunity to help in this selection process.
- VICE PRESIDENT 2007-2009
 Multimedia Production Division
 Association for Educational Communications and Technology
- As one of the more active divisions, as vice president, I was able to get involved in this organization and work with some of the future leaders.
- IMMEDIATE PAST PRESIDENT 2007-2008
 Graduate Student Assembly
 Association for Educational Communications and Technology
- I served as a mentor to the newly-elected board members so the Assembly would continue to be successful.
- PRESIDENT 2006-2007
 Graduate Student Assembly
 Association for Educational Communications and Technology
- I was one of five Doctoral students who presented the idea of this Assembly to the AECT Board. We wrote the proposal which included by-laws and a plan of integration. The proposal was accepted by the board and the team voted to have me serve as the inaugural President. This assembly gave a home to Graduate Students in the AECT, and continues strong today.
- COMMITTEE MEMBER 2004-2006
 Copyright Committee
 Association for Educational Communications and Technology
- Since I was interested in copyright licensing and open content, it was a wise move to join this committee which had other like-minded thinkers. I soon found myself involved in publications and presentations involving the subject.
- ANNUAL CONFERENCE VOLUNTEER 2000-2007
 Association for Educational Communications and Technology
- Students are given the opportunity to volunteer helping the annual conference to run smoothly. I had a great time doing this each year because it is an opportunity to give back, and to meet with the experts in the field.

JUDGE 2003
International Student Media Festival

I was asked to serve as one of the judges of the international student multimedia projects which are judged to win awards.

VOLUNTEER 1994-1996

I was engaged in voluntary service in Barcelona, Spain, where I studied the Spanish and Catalan languages and Spanish culture.

CURRENT and PAST PROFESSIONAL AFFILIATIONS

Association for Educational Communications and Technology
American Educational Research Association
Association for Education in Journalism & Mass Communication
Association for Financial Planning and Counseling Education
Graduates in Instructional Systems Technology, Indiana University
Instructional Technology Student Association, Utah State University
Sigma Iota Epsilon, the Business Management Fraternity

HONORS and AWARDS

- Joe E. Whiteside Scholar-Athlete Luncheon Award , USU Athletics	2011
-Nominated for the Faculty Advisor of the Year Robin's Award	2010
-Recognized Advisor for the student awarded the national Plank Award in PR	2010
- Joe E. Whiteside Scholar-Athlete Luncheon Award , USU Athletics	2010
- Telly Award winner, DVD Production	2010
- recognized faculty at the annual appreciation event, Sigma Chi and Kappa Delta	2009
-Nominated for the Faculty Advisor of the Year Robin's Award	2009
- Telly Award winner, DVD Production	2009
-Graduate Student Assistantship Enhancement Award	2008
- Telly Award winner, DVD Production	2008
- recognized faculty member at the annual Professor Tea, Chi Omega	2007
-AECT Strohbehn Intern , a top Doctoral Student Award in Ed. Communications	2006
-Graduate Student Senate Conference Travel Award recipient	2005
-Exemplary Service Scholarship recipient, Indiana Auditorium, Indiana University	2004
- Excellent Instruction Award in the Grads in Instructional Systems Tech. Series	2003
- Outstanding Team Project Award , Instructional Systems Tech., Indiana Univ.	2001
-Condie Memorial Scholarship recipient, Instructional Technology, Utah State Univ.	2000
- Member , Honors Society of Phi Kappa Phi	1998
- Elected Member , Beta Gamma Sigma, Business Management Honors Society	1998
- Invited Member , Golden Key Honors Society	1998
-The Founder's Award recipient, Order of the Arrow, Boy Scouts of America	1994
- Vigil Honor member , Order of the Arrow, Boy Scouts of America	1993
- Presidential Scholarship recipient, Utah State University	1993
- Eagle Scout , Boy Scouts of America	1989