

UNLOCKING OUR TREASURE CHEST: THE STRATEGIC IMPLICATIONS OF OPEN ACCESS FOR THE UNIVERSITY OF SOUTH AFRICA

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1 BACKGROUND

A university as an educational institution can be seen as the keeper of intellectual riches and as holding the key to virtually unlimited knowledge resources. Within Africa, Unisa is one of the major gateways to potential intellectual wealth for its students. In 2011, Unisa announced that it was becoming an open access institution which would make all its study materials available for free to all members of the public. Our treasure chest of knowledge has now been unlocked, and its effects and strategic potential are ground-breaking for this university. It is crucial that the university manages this resource to its optimal potential, to ensure that the financial investment made in this wealth creation ultimately yields growth for the university as well as for the rest of Africa and its people.

This paper is aimed at making observations and practical suggestions regarding the potential developments needed to utilise the open access resources of a distance education institution optimally. The aim is not to scrutinise in detail any specific section of Unisa. Suggestions are made from the perspective of electronic resource management and teaching and publishing within a global arena, with a view to global benchmarking and aligning with international trends and partners.

2 ANALYSING THE IMPACT

2.1 “Free” materials and their financial implications: open access has a funding base

Having taken the ground-breaking step of making available its study materials for free to the general public, Unisa needs to consider the immediate implication of development costs. Study materials content is developed by salaried staff at an institution, implying that the institution has paid for and will continue to pay for this content development, to ensure that the chain of materials is perpetuated and materials are continuously supplemented and renewed. The outcome is a product (or study guide) within a growing collection of valuable knowledge assets with increasing commercial value in both the teaching and the subject-specific working environment. Previously, such study guides were sold to students or any external party (even outside the education environment) who approached the university to purchase such materials (and it is possible that hard-copy sales may continue). The initial intention of such sales was to cover production costs only, with no active attempts made to publicise such available materials to the general public.

Any education institution offering its study materials within the open access model must engage with the wider financial implications of having chosen to absorb the development cost of all such materials. In calculating this cost to the institution, the full collection that has been made available must be considered, pertaining to back issues of study materials to be made available simultaneously. In continuously building on its strong knowledge base as a growing asset which could potentially offer the institution a competitive advantage, primarily in the African education marketplace, the key will be finding a balancing act to use the resources to strengthen the institution.

Once a clear funding base and funding models have been established for the various components of the study collection, the university can move forward to adequately and strategically enrich its collection of study materials on an ongoing basis. It can also focus on materials development which is relevant to users, which will attract more researchers to the institution and which is strategically placed globally to maximise benefit. Such content rewards may be measured in both financial and strategic terms.

International examples (of the funding bases required) abound, providing live case studies and examples, which enable an institution that is new to online resources to be guided by existing models. The challenge for an African distance education university is to engage selectively with such examples, while adapting to the differing circumstances and needs of its users.

2.2 Benchmarking: Unisa and its strategic partners

Unisa is actively in a position to compare models with teaching partners around the world. This ensures an accelerated learning environment, which will theoretically safeguard this institution to an extent from making avoidable mistakes. It is crucial to develop a strong research base around open access education, to ensure Unisa positions itself correctly within this context.

Unisa has over the years established itself as a world leader in distance education, with collaborative agreements with a number of global distance education institutions (such as the Indira Gandhi University, the Open University and others: the Unisa Strategic Office can supply more information on partners who are also open access institutions, or who have some open access content available). Unisa and its distance education partners globally can now more actively engage with each other on the exchange of content, widening the pool of resources available to all institutions within distance education consortia.

2.3 Setting the parameters of the collection: what is free and what is not?

The crucial need is to engage with the parameters for open access materials within an institution. It has been established that commercial content held within certificate courses, and other small commercial entities such as music examination papers currently being sold to members of the public, remain outside the domain of open

access, and teaching vendors at Unisa may continue to sell such materials either as part of short courses, or as separate teaching and examination preparation tools (as in the case of the Unisa music examinations papers). This is because the various centres and departments stand to lose valuable income should their course content become freely available to the public.

Within a commercial teaching environment, open access materials can however enrich the teaching experience further. The teaching of commercial courses must actively use or promote to its ad hoc student body the availability of extra materials, in order to widen the learning experience. For instance, a student of The Basics of Business Certificate Course will benefit from a list of additional resources for further reading, which adds to the general learning experience. In the same manner, the music examinations section needs to make available for free at least some of their materials, not only to engage in the open access teaching model, but also to thereby promote and enrich their teaching offering.

2.4 Free for all and all for free? Considering cost models

Within parallel online environments such as the cellphone industry, consumers have become accustomed to paying not only for airtime, but also for either applications or online resources.

The danger in giving away content for free could be that such content may become devalued: lessons from the open access publishing environment, from publishers such as the HSRC Press (which has made its books available online for free, while it still sells hard copies of books), indicate that in the long run, sales of hard copies are affected if e-versions are available at no cost.

The “see for free & pay for print” models already used within the publishing environment offer a possible partial solution to the open access distance education environment, if the teaching institution sees its students as being ready to migrate to the online environment and in need of an additional financial incentive to do so.

General consensus locally and globally is that educational institutions must increasingly depend on the support of their governing bodies. Pertaining to South Africa, the latest ASSAf Report recommends more support for specific study fields within the humanities, while the scope of the report is on assisting academic publishing. American university presses openly declare themselves to be not-for-profit organisations, given the challenges within the academic publishing industry (see the report by the American Association of University Presses).

3 UNPACKING OUR OPEN ACCESS RESOURCES

3.1 The online environment is global

Entering a global arena of online materials means that each study field must actively engage with other available online resources and collections. This entails that one institution’s teaching environment becomes more widely visible, and by implication

also more open to comparison with other institutions and teaching materials. It is vital that there is active engagement with this wider environment, pertaining to linking up with materials available elsewhere in the world on the basis of enriching the learning experience and providing links to contextually relevant information. Once an active dialogue has been set up among the various resources available globally, the distance education student can begin to benefit fully from the newly opened-up teaching environment.

3.2 Making the collection accessible: The Unisa Library's role

The Unisa Library's Institutional Repository can play an active role in enabling wider access to the institution's vast collection of study materials. Library professionals can advise on the placement and linking of these materials to existing and new content, to ensure that backlist study materials are linked to current courses on offer, thus offering an enriched teaching experience.

3.3 Sifting and structuring towards easy reference for students

Key in maximising the benefit of a wider pool of open access resources is ensuring that information is made available selectively; the busy distance education student needs materials to be preselected and sorted in terms of relevance to current studies and courses. Study materials content can thus be enriched by reference to other available resources, but needs structuring into course content to ensure that it is integrated and does not become an add-on approach.

Definition lists, glossaries and basic concept explanations per subject field need to be made available to students as knowledge resources to which they can resort when doing revision; this is especially crucial to a distance education environment. In fact, any classic content and basic building blocks of subject knowledge or material to which students often need to refer, must be made accessible via a structured online environment with full search capabilities, among other things.

3.4 Tapping into global resources: Unisa and its global teaching partners

There is a wealth of materials available online to tap into; the key is linking students with relevant resources at the point where this information is needed. Hyperlinks within online teaching materials may be ideal, but initially even just making available lists of resources on additional reading lists will be of assistance in moving to a more virtually "boundary-less" resource.

4 UTILISING UNISA'S OPEN ACCESS RESOURCES TO GROW OUR CLIENT BASE

4.1 Boosting the Unisa brand

The Unisa brand value can be enhanced once the full collection is properly unlocked and made available to the public. The newly emergent aspect of Unisa, as a

benevolent and generous educator acting in the best interest of the nation, must be widely marketed to secure an improved place in the local market as well as on the continent of Africa.

4.2 Inviting the public: packaging and using the content strategically

The public must be invited to make use of the newly available materials in a structured manner. Unisa could consider a lunchtime workshop series to be aired online, during which the public is introduced to the collection of available resources.

4.3 Gaining new income from old content: e-resource models to look at

Unisa must capitalise on its assets; back issues of study materials which contain valuable content should be re-marketed so they become useful to the public. The collection needs users, or its value to the community is reduced. The Unisa study materials collection can potentially change the lives of many, and if the model of paying for print copies can be followed, the modest income generated can be re-invested into building the system.

4.4 A two-way street: what information do people need?

It is important to be guided from the ground up when discovering which information units are in demand and structuring the development of an open access collection on a needs basis. This will ensure that the collection's development is in line with public or student needs, or both.

4.5 Inviting funders to sponsor more resource development online

The possibility of adding on sponsor-driven space can be considered, since the impact of the collection can be widened once donor funding is made available.

4.6 Adding value

The teaching approach of adding value to existing programmes ensures teaching on multiple levels. It also ensures that the newcomer (who is supplied with basic content information and glossaries etc. that are suited to his/her needs) as well as the advanced user (who is supplied with additional and more challenging content) are both supported by the same education offering.

5 IMPLICATIONS FOR THE STUDY MATERIALS UNIT

5.1 Going green and leading the way with XML projects

The correct structuring of all new study guides along an XML-driven path even at the typesetting stage, such as now being implemented at this unit, bodes well for the future of feeding into a larger system whereby knowledge units can be readily accessed on the basis of keyword searches.

6 IMPLICATIONS FOR UNISA PRESS

6.1 Engaging with the parent institution's open access policy in the face of economic pressures

Unisa Press is currently drafting a policy on diversifying its print channels to actively engage with new publishing models. As part of this policy, a portion of its content will also be made available via the Institutional Repository to form part of the open access teaching model. However, Unisa Press must do this in a strategic manner, to ensure that freely available content is used to advertise other content.

At the time of writing, Unisa Press is weighing up various economic models, with the principle being to possibly engage in a hybrid publishing model of partial open access (albeit with a strong funding base from the institution). A viability study has just commenced, so that outcomes in any direction are not yet available.

7 CONCLUSION

Unisa as a distance education institution within Africa has made a ground-breaking decision to move into the open access arena by offering one of its prime strategic components, its intellectual wealth, for free to members of the public. This generosity of spirit now needs several "legs" to symbolically walk into the lives of people, and to actively make a difference to Africa's inhabitants. The various components within Unisa can become such legs, where it is vital for all parts of the institution to actively work towards engaging with this major strategic policy shift. Unisa must capitalise on its collection of open access materials in order to grow to its full potential.

9 BIBLIOGRAPHY

10 FOOTNOTE/DEVELOPMENT NOTE

This paper will need refinement prior to the September 2012 conference with regard to the following:

- Actual policy documents issued by Unisa will need scrutinising re the actual parameters set for open access.
- Discussions should be held with policymakers, ICT and *myUnisa* staff and other relevant stakeholders on campus to ascertain what is currently being done to manage and publicise the open access collection of study materials.