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Faculty of Arts and Humanities

School of Humanities

Sharing Voices: exploring open educational practices with language educators and students through participatory research

by

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Critical commentary for the degree of **Doctor of Philosophy**

February 2022

University of Southampton

Abstract

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This commentary is a submission for the Award of PHD by Published Works. The work described here broke new ground and is an expression of the emerging, transformational change that advances in digital technology are making to academic scholarship. It challenges traditional research approaches in every way: from design, through data collection, dissemination and impact. It celebrates collaboration as part of a democratic, inclusive, participatory action research approach that reflects the nature of learning in a digital age as connected, networked, collaborative and socially constructed (Siemens, 2005).

The commentary organises a programme of innovative work exploring the area of open educational practice (OEP) for language teaching and language teacher education in Higher Education. This exploration is presented from a range of perspectives including language teachers working in varied contexts and language students. It is work that has contributed knowledge on international, national, local and individual levels as a direct result of its innovative design: it is work that has had an impact and was often transformational.

Abstract

The work here has been selected to illustrate the foundations of a sustained individual research journey. The consistent aim of this research was to explore and understand the challenges, drivers and implications of OEP for language educators through practical projects. The work was undertaken at an early point in the development of the field and it explored and encouraged genuine practice change. The work took place at the beginning of my career as a committed supporter and creator of open education and it has influenced the development of my current roles. It focuses on the use and creation of OERs and developing OEP. The submission reflects the diversity of open digital scholarship and consists of peer-reviewed publications, multimedia assets and published technical reports for national, UK government-funded, multi-institutional projects.

Findings present a picture of OEP in action, as it relates to language educators, researchers and students. They reveal that OEP could be beneficial for language teacher professional development and that community-focussed networks are important in realising this benefit. Open collaboration led to creativity and rich engagement, and was clearly satisfying and rewarding for participants, including students. Findings suggested that OEP could offer a response to contextual challenges faced by language educators in their professional lives. They indicated that the involvement of students in collaborative open educational resource (OER)-creation projects could be impactful and motivating for students and educators. Findings also highlighted challenges to engagement with OEP, including institutional barriers, technical issues, personal reluctance to share work and legal obstacles.

Overall, this diversity of work demonstrates that the context of a language educator's professional life is essential in fostering or hindering uptake of OER and understanding the drivers and barriers to the adoption of OEP. The context of subject discipline provides the purpose and motivation for engaging with OEP. Finally, my work demonstrates the power of a participatory action research approach in exploring OEP. It reveals an approach that ensures a diverse, enduring, diffuse impact and one that through its open, democratic, collaborative nature, is suited to its field and to the nature of academic life and learning in a digital age.

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List of Accompanying Materials

Member of staff in Candidature for the Degree of the Doctor of Philosophy

Field of research: Modern Languages and Linguistics

Works to be included in the submission c. 50,000w:

Publications include core project technical reports and outputs, as well as reports, articles and chapters arising from and related to the core work. In keeping with the collaborative ethos of this submission, I include co-authored work for which collaboration statements are included in Appendix B.

Exploring open educational practice with different communities of language teachers

1. Community cafe final report: Borthwick, K. and Dickens, A (2011) *Community Cafe Final Report*, JISC. Originally published on the JISC website, now available via ePrints.
2. Peer-reviewed journal article: Borthwick K., Dickens A. (2013), The Community Café: creating and sharing open educational resources with community-based language teachers, *Journal of e-Learning and Knowledge Society*, v.9, n.1, 73-83. ISSN: 1826-6223, e-ISSN:1971-8829
3. Outputs from the project: all resources including OERs created by participants, guidance and workshop materials created by the author and the project team
4. Related book chapter: Borthwick, K. (2018) 'Support unsung heroes: community-based language learning and teaching' in Kelly, M. [ed.] *Languages after Brexit*, Palgrave Macmillan.
5. FAVOR project final report: Borthwick, K. (2012) *The FAVOR project final report* JISC. Originally published on the JISC website, now available via ePrints.
6. Peer-reviewed journal article: Borthwick, K., and Gallagher-Brett, A. (2014) 'Inspiration, ideas, encouragement': teacher development and improved use of technology in language teaching through open educational practice, *Computer Assisted Language Learning*, Vol. 27 (2), pp. 163-183
7. Peer-reviewed short paper: Borthwick, K. and Dickens, A. (2012) 'One Size Doesn't Fit All: Contrasting Approaches to Building Communities of OER Users Amongst the Language Teaching Community' in *EuroCALL Conference 2012 short papers*, 22-25 August 2012 in Gothenburg, Sweden.

List of Accompanying Materials

8. *Outputs from the project*: all resources including OERs created by participants, guidance materials created by the author, reporting docs from the project team; final reports from each institutional partner

Open educational practice and language educators: linking research and teaching

9. OpenLIVES final project report: Borthwick, K. (2013) *OpenLIVES Final Report*. Originally published on the JISC website, now available via ePrints.
10. The digitised OER collection, project blog, final reporting video, directed and produced by Kate Borthwick.
11. Final project report for 'iTunes and You': Borthwick, K. (2013) *iTunes and You*, Higher Education Academy. Originally published on the HEA website, now available via ePrints.
12. Final project report for the XML project: Borthwick, K. (2014) *The XML project: Xerte and Modern Languages*. HEA. Originally published on the HEA website, now available via ePrints.
13. XML project blog.
14. Co-authored chapter (drawing on all work and experience): Comas-Quinn, A. & Borthwick, K. (2015) Sharing: open educational resources for language teachers. In, Hampel, R. and Stickler, U. (eds.) *Developing Online Language Teaching: research-based pedagogies and reflective practices*. Basingstoke, GB, Palgrave Macmillan, 96-112.

Programme of work

A range of published works in the field of open education in Modern Languages and Linguistics are submitted for the award, comparable to a PhD thesis. This critical commentary operates as a retrospective reflection on a series of exploratory projects which used a participatory action research approach to enhance and understand a novel area of educational practice.

A permanent record of the published work is available publicly, in open access repositories, through academic search engines, on archived websites, or in digital and print format. It should be noted that significant restructures of JISC and the HEA (funders of the work presented here) have taken place in the last decade, affecting the public availability of their archive. Where submissions are no longer available via official project sites, they have been shared on open access research repositories.

The submissions presented in this award are key selections among a track record of scholarly activity, project work and publications spanning 15 years. I include a CV in the Appendices to provide contextual information and a detailed bibliography of publications.

All the work submitted has been developed and published while I have been employed by the University of Southampton. Publications span a 3 year period, between 2011 and 2014, within the Calendar regulations timeline.

Research Thesis: Declaration of Authorship

Print name: Kate Elizabeth Borthwick

Title of thesis: Sharing Voices: exploring open educational practices with language educators and students through participatory research

I declare that this thesis and the work presented in it are my own and has been generated by me as the result of my own original research.

I confirm that:

1. This work was done wholly or mainly while in candidature for a research degree at this University;
2. Where any part of this thesis has previously been submitted for a degree or any other qualification at this University or any other institution, this has been clearly stated;
3. Where I have consulted the published work of others, this is always clearly attributed;
4. Where I have quoted from the work of others, the source is always given. With the exception of such quotations, this thesis is entirely my own work;
5. I have acknowledged all main sources of help;
6. Where the thesis is based on work done by myself jointly with others, I have made clear exactly what was done by others and what I have contributed myself;
7. Parts of this work have been published as:

Borthwick K., Dickens A. (2013), The Community Café: creating and sharing open educational resources with community-based language teachers, *Journal of e-Learning and Knowledge Society*, v.9, n.1, 73-83. ISSN: 1826-6223, e-ISSN:1971-8829

Borthwick, K. and Dickens, A (2011) *Community Cafe Final Report*, JISC.

Borthwick, K. (2018) 'Support unsung heroes: community-based language learning and teaching' in Kelly, M. [ed.] *Languages after Brexit*, Palgrave Macmillan.

Borthwick, K. (2012) *The FAVOR project final report* JISC.

Borthwick, K., and Gallagher-Brett, A. (2014) 'Inspiration, ideas, encouragement': teacher development and improved use of technology in language teaching through open educational practice, *Computer Assisted Language Learning*, Vol. 27 (2), pp. 163-183

Research Thesis: Declaration of Authorship

Borthwick, K. and Dickens, A. (2012) 'One Size Doesn't Fit All: Contrasting Approaches to Building Communities of OER Users Amongst the Language Teaching Community' in *EuroCALL Conference 2012 short papers*, 22-25 August 2012 in Gothenburg, Sweden.

Borthwick, K. (2013) *OpenLIVES Final Report*, JISC

Borthwick, K. (2013) *iTunes and You*, Higher Education Academy.

Borthwick, K. (2014) *The XML project: Xerte and Modern Languages*. Higher Education Academy.

Comas-Quinn, A. & Borthwick, K. (2015) Sharing: open educational resources for language teachers. In Hampel, R. and Stickler, U. (eds.) *Developing Online Language Teaching: research-based pedagogies and reflective practices*. Basingstoke, GB, Palgrave Macmillan, 96-112.

Signature:

Date: 20 September 2021

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Work on this commentary took place during the COVID pandemic years 2020-21. The move to working online, from home, meant that I rarely ever left my computer during this time, including weekends/holidays. My thanks go to those who helped keep me sane! In particular: Sarah, Alessia and Charlotte for endless beach walks at Hillhead, and Duncan and Alice, for endless love, support and cups of tea.

Definitions of OER and OEP

Open educational resources are digital ‘materials used to support education that may be freely accessed, reused, modified and shared by anyone’ (Downes, 2011). In practice, there is variety in how the term ‘open’ is interpreted, but the rights of users, in relation to what they can do with open content, was articulated in a widely-adopted framework by Wiley (2009) as the ‘4Rs’: open content can be reused, revised, remixed, redistributed. These permissions on how content can be used are indicated by the creator of an OER attaching an open license to their materials, such as a Creative Commons license ([Creativecommons.org](https://creativecommons.org/)). The significance of open licensing is that it allows others to (legally) use and reuse material found on the web, often while retaining an attribution to the original author (but not always, depending on the license specifications). Open licensing represents a way to share educational materials that avoids problematic copyright issues.

Wiley subsequently added a fifth ‘R’ – Retain (as in the creator retains rights over the content) – and this ‘5Rs’ model (Wiley, 2014) has now been widely adopted by other organisations, notably Creative Commons (<https://creativecommons.org/>) and the William and Flora Hewlett Foundation (<https://hewlett.org/strategy/open-education/>). The work in this submission was carried out prior to 2014 and so took Wiley’s ‘4Rs’ idea as a basic description of OER.

The term ‘OER’ covers a wide range of possible resource types. Weller (2010) describes ‘big and little’ OER to emphasise the difference between whole courses of open learning (such as MOOCs – ‘big OER’) and smaller discrete open educational materials (such as an image or a reading list – ‘little OER’). The project work described in this commentary focuses on creating ‘little OER’ and embraces the ideas expressed in Wiley’s 4Rs framework. However, the act of creation, use, discussion, development of OER – and many project outputs discussing open education in practice (e.g. guidance documents) – merges into the realm of open educational practice.

Open educational practices (OEP) is a broad term covering a range of activities and approaches starting with the creation and publication of OER. As the work described here explores the development of open educational practices, I embrace a loose definition here, while keeping Catherine Cronin’s suggestion in mind: “the use of OER, open pedagogies and open, transparent teaching practices with the goals of improving access, enhancing learning and empowering learners” (Cronin, 2020: 152). The work described here was conducted at an early stage in the development of OEP and thus, feeds into evolving understandings of the term (as will become evident below).

Chapter 1 Introduction

1.1 Background: the field

Open educational practice (OEP) as a field of study within technology enhanced learning has emerged over the last 15-20 years and responds to rapid technical developments in the World Wide Web enabling collaborative working, easy file-sharing and multiple, varied ways to communicate with and discover like-minded practitioners. As the field has developed, so has the conception of what is meant by 'OEP.' OEP is a broad term covering a range of open education-related activities. It continues to evolve from a starting point related to the creation, open sharing and re-use of digital open educational resources (OER) to a richer concept of how educators engage with aspects of open working. So that in 2020, Catherine Cronin, characterised it thus "simply put [it is a combination of] the use of OER, open pedagogies and open, transparent teaching practices with the goals of improving access, enhancing learning and empowering learners" (Cronin, 2020: 152).

The last decade has seen a move to a situation where an assumption of open access in public research materials/outputs is now widespread, both for creators and users of material. However, the picture is less clear in relation to the creation and use of open educational materials (Beaven, 2018), despite the fact that open education policies are now promoted at inter-governmental level (e.g UNESCO¹, EU²), National level (USA,³ Scotland⁴), and Institutional level (examples from the UK include the Universities of Leeds⁵ and Edinburgh⁶). The picture is complicated further by the rise of one aspect of open educational practice: the number of Massive Open Online Courses (MOOCs) has gone from a handful in 2012 to 16.3K in 2020 and 180 million learners (Shah, 2020).

This new and emerging field requires innovative approaches to research that are collaborative and transparent. The discussion, negotiation and critique of open educational practices necessarily takes place 'in the open' and often in practice: understanding what open education means for education in general, has come from engaging with it in action. Through the sharing of data, knowledge and experience in open and unconventional academic spaces, the field has

¹ UNESCO OER Declaration (2012) <https://unesdoc.unesco.org/ark:/48223/pf0000246687>

² EU Science Hub: open education <https://ec.europa.eu/jrc/en/open-education>

³ Office of Educational Technology, USA, Open Education <https://tech.ed.gov/open/>

⁴ Open Educational Practices in Scotland (2014-2017). A funded project. Materials now archived by the Open University <https://www.open.edu/openlearncreate/course/index.php?categoryid=24>

⁵ University of Leeds OER Policy https://ses.leeds.ac.uk/download/96/open_educational_resources

⁶ University of Edinburgh OER Policy <https://open.ed.ac.uk/about/>

moved progressively forward. In this way, the field aligns to the evolving nature of digital scholarship.

1.2 The changing nature of digital scholarship

The work presented here is part of a landscape of transformation in scholarship. It expresses the emerging reality of new digital, open, scholarly ways of working enabled by rapid advances in digital technology. In the 2010s, the developing nature of the Internet was enabling “a new type of education and scholarship context” (Anderson, 2009), that was framed by openness, sharing and the “democratization of knowledge sharing and dissemination” (Veletsianos & Kimmons, 2012:168). Martin Weller explained this radical, transformational change in three ways: the dramatic increase in the quantity of open, scholarly information available; the widespread availability of open networks through which to share and discover information, and the range and variety of information newly being considered as legitimate examples of scholarly activity (Weller, 2011). Open, digital scholarship was becoming an inevitable and necessary part of a scholar’s life as it could inspire creativity and encourage innovation and experimentation (Weller, 2012). The idea of a transformational change associated with working in the digital space, also found resonance in the developing field of digital humanities, where researchers noted that “in contrast with most traditional forms of scholarship, digital approaches are conspicuously collaborative and generative” (Burdick et al, 2012: 3). And that there was a need to “[maintain] criticality and experimentation...challenging received traditions [and finding] innovative forms of public engagement, new publishing models, imaginative ways of structuring humanistic work, and new units of argument” (ibid. 2012: 114).

The work discussed in this submission fits into this landscape of transformation. It is work that takes a deliberately participatory research approach that was inclusive, democratic and collaborative. Outputs were shared in non-traditional formats and were part of the proliferation of open, scholarly content available on the web. Impact of the work tended to be measured in scholarly material shared/created, project reports on novel approaches, evidence of individual practice-change and outreach through informal networks rather than books, academic articles or conference papers (although such traditional outputs are also represented here). This participatory approach affected every aspect of research design and influences how project work, data collection, data interpretation and dissemination, the role of myself as researcher and project impacts are understood.

1.3 The context of language teaching and learning

My explorations of open educational practice take place within the context of language teaching and learning. This subject specific context was the lens through which I explored open educational practices and ultimately, would reveal itself to be a crucial factor in the successful adoption of OEP.

At the time of the work in this submission, modern foreign languages (MFL) in the UK were designated one of several ‘strategically important and vulnerable subjects’ and as such, were acknowledged as strategically important but requiring ‘*action to enable them to continue to be available at a level and in a manner that meets the national interest.*’ (HEFCE, 2011: 6). Such subjects attracted specific investment, and the teaching and learning of languages at all levels in education drew support from a range of national organisations and networks e.g. the Higher Education Academy (HEA) Subject Centre for Languages, Linguistics and Area Studies (LLAS),⁷ the National Centre for Languages (CILT)⁸ and the Routes into Languages network.⁹ These groups were part of a landscape of resources which funded research and innovative practice in teaching languages, and formed an active and enthusiastic community.

However, the same 2011 HEFCE report also noted ongoing vulnerabilities for MFL: funding challenges around how to balance high cost provision with declining student numbers (MFL traditionally has a high staff-student ratio due to its practical, skills-based nature) and how to sustain student numbers and research activity (2011: 4). Other challenges facing the languages sector were noted elsewhere: the lack of a coherent identity for MFL as a discipline (Worton, 2009) and the need for language skills and language content experts to work more closely and productively together (Coleman, 2004); the diverse range of educational contexts in which language is taught and by whom, including within community-based settings (McPake et al, 2007); the need for language teacher development opportunities in digital skills (Compton, 2009); the lack of resources (digital or otherwise) for less widely used languages (McPake et al, 2007); and a change in the profile of language educators in universities with an increasing emphasis on part-time, hourly-paid staff to deliver teaching (Howarth, 2011). The collaboration, collegiality and connectivity offered by developments in digital technology suggest potential ways to address some of these challenges and in 2002, a national languages strategy (DfES, 2002) had called for

⁷ Subject Centres supported teaching and learning in subject disciplines. They were based in Universities, were national-facing in their mission and scope, and community-orientated.

⁸ The Centre and its website are now defunct.

⁹ Routes into Languages is no longer a funded project but local regions continue to run local activities to support language learning and teaching under the ‘Routes’ banner. In 2022, the project has renewed focus and coordination under the auspices of the University Council of Modern Languages.

greater use of e-learning and digital communities to encourage language learning. Researchers had also been promoting the use of informal online networks for language teacher development for some time (e.g. Hubbard, 2008).

My work in this submission responded to the contextual challenges of language teaching and learning in a pro-active way: by seeking approaches to address the challenges in the sector through participatory action with a range of language educators and students in digital communities of open practice. Together, we would explore and initiate innovative, open ways of working and consider how these practices might sustain and develop the teaching of languages. At the same time, we would contribute important knowledge on how open education might enhance practice in a specific discipline context.

1.4 Professional background and context of the work

The work included in this submission covers a range of approaches in the exploration of open educational practices with language teachers and students. For me, it was foundational work which has influenced and informed my subsequent success as one of the first language MOOC designers, researcher and leader in open education and languages. I am committed to open, collaborative practice. The work described here features a sustained and coherent research focus on the development of OEP, and was impactful, transformational and made a tangible contribution to knowledge. It was important work both for me, for the field of open education, and for language teaching and learning, and this is why I have sought to focus on this coherent body of work (from an active career in open education) to form the basis of this submission. In my subsequent career, I have maintained my commitment to open education as an active open practitioner, researcher and innovator in relation to open education and technology enhanced learning. I now hold leadership roles as Director of the University of Southampton's open online course programme and Vice-President of the European Association of Computer Assisted Language Learning, and I regularly author open access publications about my own work and curate the work of others in published collections. I am a frequently invited speaker, most recently as a keynote to a European project event, in December 2021, on open education and languages.¹⁰

The work undertaken for this submission took place when I was employed at the based at the HEA Subject Centre for Languages, Linguistics and Area Studies (LLAS) based at the University of

¹⁰ See Appendix A, my CV.

Southampton.¹¹ Prior to the work in the submission being carried out, I had been co-investigator on a number of projects exploring the development of technical repositories for sharing digital learning objects, led by colleagues in Southampton's Web and Internet Science Institute.¹² These projects had led to the development of the LanguageBox open educational resource repository (a space for sharing language-related resources), for which I led community engagement and feedback.¹³ I also managed a multi-partner, cross-institutional project that developed a repository for sharing Humanities-specific resources, the HumBox¹⁴ OER repository (see Millard et al., 2013, a co-authored article, or Borthwick, 2012). Both repositories were used by educators globally for sharing educational resources. The focus in these projects was finding technical solutions to enable the sharing of digital language learning materials, but my work with the language-educator community inspired an interest in the culture and practices of open education more broadly that continues into my current role.¹⁵ It was this early technical work that laid the foundations for an impactful exploration of the development of OEP and the role of the language educator community within this development.

1.5 Aims of the research programme and contribution

The consistent and central goal of the work submitted here was to understand the challenges, drivers and implications of open educational practice for language educators. In seeking to achieve this goal, I worked with language educators from a range of professional contexts: community-based teachers, part-time educators in Higher Education, language content researchers and students over a period of years.

The work was undertaken at an early stage in the development of the field of open education and sought to engage language educators and students in the practical creation and sharing of OER within a community context. In the course of this activity, the research hoped to uncover: practitioner attitudes towards the creation and sharing of OER; challenges and benefits to the creation and sharing of OER – both practical and philosophical; whether the context of subject discipline, and the sub-context of educators professional lives, were factors in such challenges and

¹¹ The funding for HEA Subject Centres was withdrawn in 2011. LLAS continued to exist as a successful enterprise unit until 2016, led by Professor Michael Kelly at the University of Southampton.

¹² I was co-investigator in the project teams working on: The OneShare project (JISC) 2009/10; Faroes (JISC) 2008; and L20: Sharing Language Learning Objects (JISC) 2006/7.

¹³ www.languagebox.ac.uk The project team gave numerous presentations about the creation and implementation of LanguageBox. See my CV in Appendix A for a list of selected presentations.

¹⁴ www.humbox.ac.uk still exists and is used today. It is now managed by the University of Southampton ePrints team.

¹⁵ I am the University of Southampton Director of the open online course programme. See chapter 5 and Appendix A for more biographical information.

Chapter 1

benefits; whether the development and proliferation of open educational content and practices could enhance the professional lives of language educators; what the relationship might be between open education and professional development for educators, and how open educational practices extend to how language teachers work with students. Research work was carried out through a series of projects and each project had distinctive aims, outputs and impact; however, as the researcher behind each project, my overarching aim was to gain knowledge from practice about the role of open education in language learning and teaching.

The work described here took a participatory action research (PAR) approach which was well-suited to the exploration of open education. PAR is a qualitative approach which fully integrates “participation (life in society), Action (experience) and Research (knowledge-making)” (Chevalier and Buckles, 2019:14). It is an inclusive, democratic approach which sees no hierarchical distinction between researcher and participants, and individual agency and ownership over contribution is a key aspect of the approach. This aligns well to explorations in open education, where individuals take responsibility for how much material they share and with whom, the content and presentation of their own OER, whether they share (or not), and how they license the OER for re-use by others (what rights for adaption and accreditation they assign). The individual responsibility inherent in OEP means that engagement must be active, owned and individual. Such commitment to personal action may lead to transformation and sustainable change in practice, both of which are common aims of PAR projects (Kemmis et al, 2014). This democratic and collaborative approach led to transformational outcomes and high levels of impact and contribution, as will be seen in chapters 3 and 4. Participant engagement with the work described here demonstrates that OEP exists on a spectrum that includes a range of levels of engagement, entirely dependent on individual choice and it was the use of a PAR approach that enabled this finding to surface. My role as researcher was to design these complex research projects, manage the activities and the participants successfully to conclusion, collect data, observe, summarise, interpret and publish results. I was also variously involved as trainer, guide, collaborator (see chapters 3 and 4).

This body of work gives a detailed picture of OEP in action, in the context of language teaching and learning. It reveals the benefits and challenges of language educators engaging in OEP and also highlights the power of working openly in shared, online, community spaces. The work reflects the evolving development and strength of an online community of practice. In doing this, it made an important contribution to national discussions and guidance around open education, generated large amounts of OER, and gave rise to transformational impact. This work played an important part in the change process which has seen a move to more widely accepted open philosophies and pedagogies in education.

1.6 Structure of the critical commentary

The commentary is organised to meet the criteria required by the University Calendar regulations: the aims and nature of the research; the coherence between the materials; how the materials fit within the context of other work in the field; and the nature and extent of my original contribution.

The **Introduction** establishes the field of research, the context of language learning and teaching, and the overarching research aims which inform my research journey. A short biography situates the submitted work within a career trajectory in open education. A definition of key terms is given.

Chapter 2 analyses the nature of the research in the context of the work and establishes the context of the field of open education. It establishes the research problem. **Chapters 3 and 4** give a detailed review of each submission, its context and contribution. Submissions are grouped by theme: open education with different communities of language teachers and open education linking research and teaching. **Chapter 5** concludes with a reflection on my overall findings and contribution to knowledge.

Chapter 2 Research context and background

At the heart of this submission are a series of technical reports related to UK government-funded project work (funded via the Joint Information Systems Committee [JISC] and/or the former Higher Education Academy [HEA]).¹⁶ These projects were exploratory, innovative, and multi-institutional. Projects were competitively bid for and subject to peer review, and robust, constant evaluation. Findings fed into JISC/HEA guidance for government and Higher Education (HE).

2.1 The nature of the research

2.1.1 Research design

My research is qualitative and takes a participatory action research (PAR) approach (Schubotz, 2020; Cohen et al, 2011). Qualitative research is “open and emergent” (Cohen, et al, 2011: 226), typically working to understand a broadly defined idea or set of research aims rather than testing explicit research hypotheses or suppositions (Cresswell, 1998). This was appropriate for the work described here, which was exploratory and sought to discover unpredictable outcomes in an area of novel practice. It aligns to Miles and Huberman’s (1994:16) conception of qualitative research as “loose,” meaning that it did not work to a predefined conceptual framework or set of research questions. The work that I focus on in this submission was structured around research aims, particular activities and the emphasis was on allowing data to emerge inductively. This kind of approach suits the investigation of new fields (Miles and Huberman, 1994:17). Researchers (Cohen et al, 2011; Miles and Huberman, 1994) have pointed out that a lack of research questions as a starting point does not imply a blank page, and qualitative researchers are “not neutral” (Cohen et al, 2011: 225). Any researcher brings their own prior experiences and ideas to a project and this was the case with the work described here (see 2.2.3).

According to Chevalier and Buckles (2019: 14), “what makes PAR unique is its commitment to fully integrating the core elements built into the acronym, namely Participation (life in society), Action

¹⁶ JISC has existed for 30 years, formerly as the government-funded ‘Joint Information Systems Committee’, it is now simply known as ‘Jisc’. It is currently a not-for-profit organisation which supports Information Technology and digital infrastructure and skills for Higher and Further Education in the UK. <https://www.jisc.ac.uk/about/who-we-are-and-what-we-do> Its mission and remit have altered over the years and it was significantly restructured in 2015/16. It remains an important asset in enhancing and providing digital services and skills support for the UK HE and FE sectors. The Higher Education Academy has also evolved over the years and is now a registered charity called ‘AdvanceHE’ <https://www.advance-he.ac.uk/>. It is an organisation which supports the development of professional skills and teaching and learning in Higher Education in the UK.

(experience) and Research (knowledge-making)” (Chevalier and Buckles, 2019:14). I have structured the following sections of this chapter according to this idea.

2.1.1.1 PAR: participation

A key aspect of the approach is the active involvement of research participants in the research itself, as co-investigators who collaborate at potentially every point in a project, from designing the research aims, to data collection and analysis, interpretation and dissemination (Schubotz, 2020). In fact, PAR researchers often talk of the democratic nature of such projects as ‘giving participants a voice’ (Schubotz, 2020:3; Kemmis et al, 2014). This is not to say that each participant brings the same energy and engagement to the project but to understand that “equal partnering...means participants bring their own goals, experiences, expectations and contributions” (Chevalier and Buckles, 2019: 27). The importance of individual agency is an essential element in understanding the projects discussed here: participants volunteered for and owned their engagement in each project, openly making contributions to project outputs under their own names. They co-owned the direction and outcomes of each project, being active in project tasks, creating project outputs and sometimes taking part in interpretation of data and dissemination of outcomes. The nature of participant engagement varied depending on the project and will be discussed in more detail below.

In PAR projects, the role of the researcher includes being “facilitator, guide, formulator and summariser of knowledge” (Cohen et al, 2011: 349). The PAR researcher is a collaborator with project participants in a way which “challenge[s] and redefine[s] the hierarchical power relations that exist between the researcher and the researched” (Schubotz, 2020: 14). This description aptly represents the role I took within each project and the nature of my general project design. Such a design demands a high level of trust and transparency between researcher and participants (Schubotz, 2020: 91) and is why empowerment is seen as a key part of PAR practice (Schubotz, 2020: 105).

2.1.1.2 PAR: action

The goals of PAR are both practical and intellectual: to produce practical solutions to identified needs and to achieve knowledge and understanding (Maxwell, 2005). These are well-known aims of any action research: to “bridge the gap between research and practice” (Somekh, 1995: 340) in finding ways to understand and improve situations and ways of working (Bradbury, 2015; Kemmis et al, 2014) to bring about improvement to practice.

Action research is recognised to be relevant and effective in educational contexts because teachers understand their own contexts, challenges and situations best; often engage in self-

reflective practices to bring about change; work collaboratively and support each other's professional development (Ferrance, 2000: 1). The collaboration and self-reflection inherent in action research methodology was a crucial element in my projects' designs.

2.1.1.3 PAR: research

PAR has grown in social and educational research in response to the perceived "failure of conventional research to address the needs of peoples and communities" (Schubotz, 2020: 3) by "generating practical and applicable knowledge" (ibid, p.10). PAR projects often do not follow conventional scientific research designs or even typical action research cycles: they involve participants being actively critical and self-reflective throughout the research process (Kemmis et al, 2014). While theoretical knowledge may be an outcome of a PAR project, such projects are usually "firmly embedded in praxis" (Schubotz, 2020: 105). A characteristic of PAR is the learning that takes places during the project for all participants: "the journey is the destination." (Schubotz, 2020: 102)

This focus on praxis and learning influences the nature of outputs and dissemination in PAR projects. Research outputs are often created or co-created with or by participants and do not fit traditional academic routes (e.g. books, journal articles etc). PAR researchers (e.g. Schubotz, 2020; Chevalier and Buckles, 2019) often cite Karl Lewin's famous phrase in support of this idea and of PAR as inspiration for practice-change: "research that produces nothing but books will not suffice" (1946: 35). Lewin is credited as the "forefather of action research" (Schubotz, 2020:15). The unconventional and collaborative nature of research outputs in my project work is attested in this submission.

A significant aspect of much PAR, is the ideological stance in relation to social change and politics, taken by many PAR practitioners. The democratic, collaborative, convention-challenging ethos of PAR has been linked to critical theory and researchers often focus their projects on socially disadvantaged groups in society with the aim of transformation and empowerment (Kemmis et al, 2014; Cohen et al, 2011). Critical theory in an educational context is described by Cohen et al (2011: 32) as: "The purpose of critical educational research is intensely practical and political, to bring about a more just, egalitarian society in which individual and collective freedoms are practised, and to eradicate the exercise and effects of illegitimate power." An example of recent second language research states explicitly that the use of a PAR approach was in part an intention to "criticize the tenets of neoliberalism" (Ordem, 2021). While my own projects had no political agenda, the ideas of transformation and empowerment for particular groups of language educators through open education were considerations in project design (see chapters 3 and 4).

2.1.1.4 PAR: impact and contribution

The impact from PAR projects is often more easily marked on individuals than on the wider community (Schubotz, 2020: 18) partly because PAR both requires and builds commitment (David, 2002) from individuals. As a result, the main criticism of PAR approaches is that while impact on participants is frequently evident, impact beyond a project or study, to the wider community often “remains either unfulfilled or unevidenced” (Schubotz, 2020: 18). This presents a problem when establishing the efficacy or value of PAR approaches. PAR projects can be small-scale and therefore, present problems with generalisability (Schubotz, 2020: 111). Although I prefer Lincoln and Guba’s term ‘transferability’ (1985: 298) with the obligation being on the researcher to ensure that information is in place to enable a study to be transferred to a new context (ibid. p.298). The project work presented here aligns to the idea of ‘transferability’ in its open nature: OER were produced with metadata and all project documentation and methodologies became published as open content in their own right. In discussing each project, I have drawn out both individual and wider national/international impact in order to rebut the idea that PAR approaches benefit solely their participants.

2.1.1.5 PAR: link to open education

PAR suits explorations of open, digital practice because of the developing affordances of technology and the internet. In his foreword to Iiyoshi and Kumar’s milestone publication on the potential of open education, John Seely Brown noted that “web 2.0 [was] creating a new kind of participatory medium” fostering a “new culture of sharing, one in which content is freely contributed and distributed with few restrictions” (Brown, J. S. in Iiyoshi and Kumar, 2008: xii). He suggests that this open, social online space would demand new approaches to education focussing “not so much on what we learn but on how we learn” (ibid: xii). These ideas link to conceptions of connectivist learning, a theory of learning proposed to suit the potentiality and reality of learning in the digital age, where learning is connected, collaborative, socially constructed, mediated through networks (Siemens, 2005). Learning in this context is controlled, directed and managed by the individual learners themselves and thus, is profoundly learner-centred. This idea alters the power relationship between teachers, learners and access to education, in a similar way to the democratic rebalancing evident in PAR between researchers and participants.

Open education is discussed in terms which critical theorists and PAR advocates would recognise: democratising, empowering, inclusive, challenging to traditional modes of education (Martin-Monje & Borthwick, 2021). For example, as a significant dimension of open education, Massive Open Online Courses (MOOCs) were widely hailed as an example of disruptive technology when

they emerged and began to proliferate in the early 2010s (Jacoby, 2014), due to the challenge they posed to existing business models of paid-for, formal, campus-based education (Flynn, 2013). It is their ‘openness’ that breaks down barriers to participation in education (Borthwick, 2020) and their perceived inclusive, learner-centred nature empowers learners in directing their own education.

2.1.1.6 PAR: research in modern languages

Action research, with its emphasis on improving practice through reflection on focussed activities, is a well-established research and developmental method in the field of modern languages and linguistics (Nasrollahi et al, 2012). High levels of participation or collaboration are inherent in action research designs and engaging in such projects can be an empowering and sustainable means of developing language teacher practice (Gallagher-Brett, 2019). In recent years (2016-19), the European Council for Modern Languages (ECML) conducted major work to develop and promote collaborative action research approaches as a way of enhancing European language teacher practice. The project provided guidance, resources, frameworks and case studies on setting up collaborative action research projects (ECML ARC website, 2021b). The power of collaborative and participatory approaches for improving practice was demonstrated in the work described here, for example, the FAVOR project (Borthwick, 2012a).

2.2 Open education: context of the field

2.2.1 The global open education movement

At the time when the projects discussed here were commissioned, there was an identified, nascent open content movement that was gathering momentum globally. The Massachusetts Institute of Technology (MIT), in the USA, had energised activity in this area with their 2001 OpenCourseware project which saw them publish a considerable amount of their teaching materials as free, open content, on the internet. MIT did this to widen access to education (MIT OpenCourseware, 2021). MIT’s initiative inspired other organisations to make open content available and quickly led to global, partnership initiatives such as the creation of the Open Education Consortium (OEC)¹⁷ which sought to bring together educational institutions and organisations around the world who were creating OER (or planning to). In 2021, the OEC still “provides advocacy and leadership around advancement of open education globally” (OE Consortium website, 2021). From 2007 onwards, UNESCO made a series of declarations and

¹⁷ <https://www.oecconsortium.org/> Formerly known as the OpenCourseWare Consortium

guidelines in relation to OER, adopting the 'Paris OER declaration' in 2012, which encouraged the development of governmental policies and infrastructure to support the creation and sharing of OER (UNESCO, 2012 Paris Declaration). The European Commission launched an Open Education Initiative in 2013 with similar aims: "to support the development and availability of open educational resources' alongside fostering enhanced digital skills in EU residents" (EU Commission, 2013). Since that time, the EU Commission has continued to develop its OER work and funded numerous projects promoting aspects of open education (EU Science Hub, 2021). Other parts of the world followed suit, for example, in China, a group of Universities united to create the China Open Resources for Education (CORE) consortium (CORE.org). Recently, in 2020, Beijing hosted the launch of UNESCO's international Global MOOC Alliance with 17 partners from around the world dedicated to collaboration, knowledge-sharing and promotion of lifelong learning. Tsinghua University, Beijing, is a key partner and the Chinese Minister for Education announced China's intention to develop open education as part of this alliance (UNESCO Global MOOC Alliance, 2020).¹⁸

The UK government responded to the open movement by funding JISC to run 'The UKOER programme, a million-pound initiative which sought to promote "...the free sharing and re-use of high-quality learning resources in the UK and worldwide as part of a wider 'open' philosophy or movement." (JISC Open education website, 2013). It aimed to create banks of OERs for use by teachers and learners, promote their use, and explore challenges around the creation, use, re-use and sustainability of OER. (JISC Open education website, 2013) and create an evidence-base for the international OER field (Cronin & McLaren, 2018).

High level policy statements and governmental actions were complimented by local institutional open approaches such as the UK Open University's (OU) Open Learn project, which launched in 2006. The project director, Patrick McAndrew, stated that two reasons for doing this were to "advance education and widen access" (McAndrew, 2006: 1) but of equal importance was the desire for the OU to join a positive, valuable initiative: "The value to the world and to other organisations can be observed at a general level and joining the movement is seen to generate a feel-good factor" (ibid, 2006:1).

2.2.2 Philosophy of the open movement

The 'feel-good factor' mentioned by McAndrew (2006), recognises the roots of the open movement in ambitions to realise education as a fundamental right for all, enhance inclusion and

¹⁸ <https://mooc.global/>

spread good practice (Conole, 2012). It is a philosophy underpinned by the idea that “the world’s knowledge is a public good and [that] technology in general and the Worldwide Web in particular provide an extraordinary opportunity for everyone to share, use, and reuse it” (Smith and Casserly, 2006: 2).

At the time, the web was beginning to provide extraordinary opportunities for sharing: it was undergoing rapid technical evolution and the sharing of digital content files of all types was becoming markedly easier. This period saw the rise of social networking sites and content-sharing sites such as Youtube. This developing social and participatory media was seen as offering “immense potential for use in learning and teaching, in particular to support new forms of communication, cooperation, and collaboration” (Conole, 2012: 131). Open educational resources that anyone could access, use and adapt seemed to have an obvious value in this networked, collaborative, social world and there was a desire to “move beyond merely considering content...to what we *do* with content” (my emphasis, Brown, J. S. in Iiyoshi and Kumar, 2008: xii) to consider pedagogies of openness and open educational practices.

2.2.3 Language teaching and learning and open content

Websites specifically devoted to the sharing of OER for languages began to appear, for example, the Center for Open Educational Resources and Language Learning (COERLL)¹⁹ at the University of Texas, USA.²⁰

In 2006-9, I was co-investigator on a succession of JISC-funded projects which explored the establishment of viable, user-friendly, community-led repositories for sharing digital learning objects amongst language educators (see 1.2). Up until the evolution of Web 2.0, digital learning objects (“small content components that are meant to be reusable in different contexts”) were held in managed, metadata-rich repositories (Neven and Duval, 2002: 1). Challenges in expanding open content and sharing it were focused on technical issues such as the design of learning object repositories, and the presentation, discoverability and metadata description of content (Downes, 2001). Our projects were designed to address technical challenges around sharing and reusing digital files. Our work led to the creation of the LanguageBox²¹, a user-friendly repository for OER

¹⁹ COERLL: <https://www.coerll.utexas.edu/coerll/>

²⁰ Repositories of OER for any subject discipline had been under development for some years: e.g. MERLOT was founded in 1997 by a team at California State University Center for Distributed Learning. <https://www.merlot.org/merlot/> and Connexions was founded in 1999 by a team at Rice University, USA, <https://cnx.org/> Connexions has now become ‘OpenStax’.

²¹ www.languagebox.ac.uk The site was actively used until 2017 by a global community of language educators. It is no longer active and is awaiting updates to be fully usable once more. It was designed by a

(Borthwick et al, 2009), which was shaped, piloted, then used by language educators across the UK.

The design of LanguageBox was innovative in its vision ‘to create a website that was usable and scalable...[had] very low entry barriers and flexible tools [with] the ultimate goal being to enable the sharing of experience within the community leading to individuals changing practice’ (Millard et al, 2013). It was a space that was populated, curated and regulated by the community as a whole. The LanguageBox went on to inform the design of other successful OER repositories such as HumBox²² and Languages Open Resources Online (LORO)²³ in 2009-10. LORO was developed by the Open University, as an open space for its distantly-located language teachers to share teaching and learning resources but its resources were also openly available to others to use (Comas-Quinn et al, 2011).

The technical focus of these repository projects reduced barriers to the practical business of individual members of a discipline community discovering, sharing, and re-using OERs, and enabled the move to an investigation of open educational practices. The LanguageBox played a significant role as the technical space for community resource sharing to happen and was used in the projects discussed in this chapter. There is a more detailed discussion of the Languages OER landscape, in my co-authored chapter, Comas-Quinn and Borthwick, 2015, in Appendix D.

2.2.4 Research problem

Open Education in the 2000s was focussed on resolving the technical issues around sharing digital resources (exemplified by the repository projects cited above) and the benefits of open, collaborative sharing were still being characterised as a vision of the future (West and Victor, 2011). It was suggested that open education offered the possibility to enhance the quality of teaching and learning through the creation and sharing of resources in open spaces (Iiyoshi and Kumar, 2008). This would encourage reflection, community critique and peer review leading to improved practice and content (Petridis et al, 2010). However, in 2010, researchers working on the nascent EU OPAL project (Open Educational Quality Initiative), had noted that the potential for OER to enhance and alter practice had not yet been realised and they highlighted the need for innovative approaches for support in OER creation and also a need for more empirical studies on the effectiveness of OER (Conole et al, 2010).

team within the University of Southampton’s Web Science group and is part of their work on the technical development of repositories including ePrints and EdShare (<https://www.eprints.org/uk/>).

²² www.humbox.ac.uk

²³ www.loro.open.ac.uk This site was closed in 2021.

Therefore, the challenge, as the open movement began to gather momentum, was not only how to increase the amount of open educational content available on the web, and how to ensure its reusability, quality, and relevance but also how to move beyond content to practice. Who would create, share, re-use useful educational resources and why? The work presented here seeks to respond to this gap.

Chapter 3 Exploring open educational practice with different communities of language teachers

Works relevant to this chapter are in Appendix C.

This chapter presents work which explores open educational practice in different communities of language teachers. It focuses on two groups: community-based language teachers (Community Cafe) and part-time language educators working in Higher Education (FAVOR).

3.1 The Community Cafe project

The Community Cafe project ran for one year from 2010-2011 and was funded by JISC under the Developing Community Content Programme (JISC Digitisation and Content programme, 2013), a strand of work which aimed to create and develop content collections through University/public collaborations.

3.1.1 Aim and research problem

The principal aim of Community Cafe was to address an identified need (McPake and Sachdev, 2008) within the community-based language²⁴ teacher group: a lack of up-to-date, appropriate digital teaching resources for the range of languages being taught in their local settings. To do this, the project planned to: train teachers in digital resource and open content creation, encourage reflective practice and the quality of teaching resources through peer review, contribute to the profile of community-based languages, and create a local, self-managed, online community of teaching practice. These teachers have limited access to resources and often create their own materials (Borthwick, 2018a), so the situation seemed a fertile one in which to increase the availability of resources and test in practice the proposed benefits of open working (see 2.2.4).

²⁴ The project took the National Centre for Languages' definition of 'community-based languages': "...languages spoken by minority groups or communities within a majority language context." CILT, 2011. The Centre and its website are now defunct.

3.1.2 Methodology

Participants volunteered to take part from the Hampshire community languages teacher network²⁵, and in keeping with PAR approaches, decided the extent to which they engaged with the project, including participation in training, producing OER or contributing to practice-sharing sessions or data gathering activities. The idea of learning from each other and progressing understanding through a shared experience was emphasised and enacted throughout. I had a range of roles including project manager, researcher, trainer, colleague, summariser and interpreter of knowledge through publication of workshop training materials and other presentations; researcher and author of reporting documents. This reflects the reality of PAR projects (Cohen et al, 2011: 349). At the same time, the principle of democratic power relations within the project was paramount and trust and transparency were important elements in completing the project successfully.

Participants received training in resource creation and open content publication, and they created and published a range of OER for language teaching. Training sessions were complemented by informal 'cafe-style' meetings to share experiences about the process, about teaching, about digital and open working experiences in general. This approach brought together two strands of work from within LLAS²⁶: my own investigations into open repositories, technology-enhanced learning and training in digital skills, and a colleague's work in establishing informal language 'cafes' for language learning as part of a successful European project (Davis and Holdom, 2008).²⁷

3.1.3 Community Cafe's context in the field

3.1.3.1 Community-based languages: professional development for teachers

There were a range of public sector or charitable initiatives through the 2000s to promote and encourage multilingualism in general and community-based language learning. A national languages strategy (DfES, 2002) had called for greater use of e-learning and digital communities to foster language learning. It also argued for greater recognition and development of skills in community languages, as essential for a more international, diverse economic situation and to enhance global citizenship (McPake & Sachdev, 2008: 45).

²⁵ This group was coordinated by Southampton city council.

²⁶ HEA Subject Centre for Languages, Linguistics and Area Studies (see 1.4).

²⁷ My colleague Alison Dickens and I each contributed our individual expertise and a collaboration agreement is included in Appendix B, in line with University of Southampton guidelines.

The call for such activities acknowledged a lack of sufficient work in supporting and promoting the teaching of community languages despite a clear need. Teacher professional development was noted as a priority for community languages teachers but was “expensive and difficult to access” (McPake et al, 2007). Public sector organisations responded with a range of targeted projects, for example, The Routes into Languages North West consortium’s COLT (Community and Lesser Taught Languages) project²⁸ which offered teacher training to local community languages teachers and link-ups to local schools; or professional development initiatives led by Goldsmith’s University of London²⁹. These projects complemented the work of charitable organisations, such as the Paul Hamlyn Foundation (<https://www.phf.org.uk/>) and John Lyon’s Charity (<https://www.jlc.london/>), both of which fund educational projects to enhance the lives and potential of young people.

Community Cafe similarly responded to the need to improve professional development for community languages teachers. The flexible, digital, open approach which had been developed through my community work creating the LanguageBox (see 2.2.3), sought to address some of the challenges for community languages teachers: the need for flexibility in teacher training programmes (McPake and Sachdev, 2008: 68), and the cost – open access is free.

3.1.3.2 OER and community languages

Working with community languages and open education was novel at the time and the European Commission would go on through the 2010s to fund successive projects promoting open education, including in relation to less widely used languages (LWUL - a term which is often applied to many community languages), such as LangOER which ran from 2014-16 and sought to understand how “Regional and Minority languages, benefit from Open Educational Practices (OEP)” (LangOER, 2016). I was an invited speaker to a LangOER webinar as a result of my Community Cafe work (see my CV, Appendix A). The idea that open sharing could increase content for LWUL, and open educational practices could benefit, connect and sustain them is one which I returned to in the context of the inclusive design of MOOCs (Borthwick, 2020).

²⁸ Routes into Languages is no longer a funded project but local regions continue to run local activities to support language learning. The North West consortium is managed by Manchester Metropolitan University <https://www.routesintolanguages.ac.uk/activities/north-west> The COLT project won the European Languages Award in 2010. <https://www.routesintolanguages.ac.uk/news/winners-european-award-languages>

²⁹ For an example Nuffield Foundation-funded arts project see ‘Creativity in the Community Languages Classroom,’ <https://www.gold.ac.uk/clcl/multilingual-learning/creativity/>. Dr Jim Andersen led work in this area.

In more recent years, EU funding has also been given to projects exploring the potential of open education for migrants and refugees such as the MOONLITE project (2016 -2019) which was funded to '[Harness] the potential of MOOCs for refugees and migrants to build their language competences and entrepreneurial skills for employment, higher education, and social inclusion' (MOONLITEproject.eu).

3.1.4 Contribution to knowledge

3.1.4.1 Findings

The project was successful: it delivered a year-long teacher training programme which focused on the use of technology in teaching; it produced a large amount of open content as OER for the teaching of community languages; the project approach, models of working and training materials were also published as OER; it enabled practice-sharing to take place in online and in-person, informal settings; it enhanced teachers' digital skills; it engaged them with a national online OER repository, and it achieved a high level of positive, consistent engagement from local teachers (Community Cafe Final report in Appendix C, Borthwick & Dickens, 2011). This kind of exploratory, online, participatory, community-sharing educator project had not been attempted before with CL teachers. All participants contributed to outputs and achievements. The participatory, collaborative approach enabled flexibility around how and when participants made their contribution: some teachers were keen developers of content, others contributed ideas to training or practice-sharing sessions, while others presented their ideas publicly. The project was unusual in seeking to bridge the gap between such teachers and HE research and development, and in offering a potential pathway to do so through open education. Such teachers were simply absent from most current debates and advances taking place in mainstream educational settings and McPake et al (2007) had already noted that community languages teachers often lack access to training, systems and knowledge arising from HE research that is offered to teachers within formal educational settings.

In this respect, the project sought to give this community of language teachers 'a voice' through the publication of their own educational resources and their engagement with open educational practice. The collaborative nature of the project design ensured that teachers' own, individual experiences and opinions would be surfaced. As noted in chapter 2, the giving of marginalised groups 'a voice' is a key aspect of PAR projects (Schubotz, 2020; Chevalier and Buckles, 2019).

The project demonstrated that this particular group of teachers had a desire for training in the use of technology and were keen to share their work and see/re-use the work of others (Borthwick & Dickens, 2011: 8). Findings revealed that there was potential for open education to

support the work of community languages teachers by broadening the availability of teaching resources for their languages and facilitating community-sharing of practice (ibid, p.11). Teachers acquired new skills in the creation of digital teaching resources and by observing the resources of others (ibid, 2011: 7). Open educational practices were entirely new to them and even the in-person sharing of professional experiences beyond linguistic and cultural groups was revealed to be unusual (ibid, p. 12). The LanguageBox gave the teachers access to an open, national space to both share their language resources and discover the work of others. It provided a cross-linguistic, cross-cultural, democratic space to share and learn from others – and in this respect, was a neutral environment (ibid, p.8). However, it was also evident that further training was needed to develop the skills required to create effective digital resources and also to understand how to share them effectively in open, digital spaces, so that others could discover and re-use them (ibid, p. 12). Findings revealed a general desire to embrace the possibilities that open education might offer but also a need for ongoing training, support and encouragement from mainstream educational sources to sustain the activity and realise the benefits. This finding echoes the work of McPake et al (2007).

A key theme that emerged from the Community Cafe project, was the power of working within a collaborative community of practice [CoP] (Lave and Wenger, 1991). A community of practice is ‘a group of people who share a concern or a passion for something they do and learn how to do it better as they do it regularly’ (Wenger, E. & Traynor, B., 2006). Observing and noting participant engagement in the project and recording participants’ own evaluative comments revealed how useful the blended CoP was in enhancing professional practice. Both the class-based practice-sharing sessions and the online space of the LanguageBox were impactful in connecting participants who would not normally interact with each other due to geographical location or cultural and linguistic background. Experiences and knowledge were exchanged and participants learnt from each other (Borthwick & Dickens, 2011: 8). The role of an effective CoP has been identified as a way for non-native speaker language teachers to enhance linguistic skills and intercultural awareness (Germain-Rutherford, 2015: 117).

3.1.4.2 Impact

a) National/international impact

The project contributed to JISC’s understanding about how open education was received within a particular discipline community through the final reporting process and through presentations I gave at JISC national meetings over the lifetime of the project. JISC’s projects feed into their overall understanding of the landscape of UK education and technology enabling them to give appropriate, informed advice to the government and the sector. The project was positively

evaluated externally by the COLT project team, from Routes into Languages North West (see note 29 and Borthwick & Dickens, 2011: 9).

Dissemination of project aims and outcomes took place locally through an event showcasing teacher-participant work at which local city councillors were present. The HEA Centre for Languages, Linguistics and Area Studies (LLAS) publicised the project via its national networks and the National Centre for Languages (CILT). I worked with some of the teacher-participants to create a community languages calendar which was printed and made available nationally for schools and also available in an open Creative Commons-licensed downloadable format. I presented about project work at a range of national and international conferences and authored a number of publications discussing project work (see CV in Appendix A).

Project outputs made a sizeable contribution to the store of open, shareable knowledge available to language educators and researchers working anywhere in the world. All content was licensed using Creative Commons to ensure that all resources could be accessed on the LanguageBox, and used and adapted (find links to this material in Appendix C).

b) Individual impact

Individual participants in the project demonstrated a wide variety of motivations for their participation but they were united in a desire to improve their practice as language teachers. This desire is a key tenet in any action research (David, 2002). Community Cafe participants attested to having learnt new skills and gained new knowledge from the community sharing of experiences (Borthwick & Dickens, 2011: 7). They suggested that there would be a lasting impact on their teaching practice from the new connections made (ibid, p.8). The sharing of open educational content under their own names and online profiles gave each teacher a tangible 'voice' and professional presence online.

Personally, the project led to an active interest in supporting local community languages' teaching and I became a founding trustee of the Community Languages Trust. This organisation promoted and supported the learning of community-based languages in the Hampshire area. I was chair of the board of 11 trustees from 2016-17. In 2018, I contributed a chapter in advocacy of community language learning (Borthwick, 2018 – see Appendix C) to the book 'Languages After Brexit' (Kelly, 2018).

Such examples of individual impact suggest the possibility of individual change resulting from project work which is the ultimate intention in PAR projects: [to be] "both the medium of change and the method of analysis of the change" (Embury, 2015: 530).

3.2 The FAVOR project (Finding a Voice through Open Resources)

The FAVOR (Finding a Voice through Open Resources) project ran for one year from 2011-12 and was funded under the JISC/HEA UKOER phase 3 programme. This funding aimed to “build on the sustainable practice identified in the first two phases, and to expand in new directions to link OER to other areas of work” (JISC UKOER Phase 3, 2013). FAVOR was a multi-institutional project which had 5 partners from Higher Education Institutions (HEI) across the UK.

3.2.1 Description, aims and methodology of the project

FAVOR aimed to explore how open educational practice might benefit a particular group of language educators: hourly-paid, part-time staff working in HEIs. The project worked with 30 teachers across 5 HEIs: Aston, Newcastle, University College London (UCL) School of Slavonic and East European Studies, University of London (UoL) School of Oriental and African Studies and Southampton. At least 18 different languages were represented.

The aim of the project was to publish a significant amount of OER, in a range of languages, which would be available for students to learn from directly, or teachers to use in the classroom. Other aims were to promote language learning, provide professional development in digital skills and open education, raise awareness of the contributions of part-time languages staff, and to build a sustainable online community for resource-sharing.

I devised and led the project, recruiting partners and coordinating them to drive the project forward. Each partner recruited participants from their language teaching community. There were all-participant in-person meetings and smaller meetings with project contacts or local ‘team’ meetings. Participants were required to be reflective and critical of their practice and responses to project work throughout. I had many roles and a key aspect was keeping the large group of participants together, coherent, motivated and focussed on achieving overall outcomes. From the outset, it was understood that participants would own their engagement and share their own understanding and findings (if they wished to) as openly available documents or outputs.

3.2.2 Coherence between the materials

FAVOR intended to build on Community Cafe by taking forward ideas around online community-building within a CoP, the possibility of OEP for professional development for language educators, and illuminating OEP in a new context for language educators (formal education at HE level). While Community Cafe was a local project in essence which fed into a national initiative around OER, FAVOR was national in scope from the outset and sought to learn from a broader canvas.

Both projects worked with slightly marginalised groups either working outside of mainstream education (Community Cafe) or in perceived low-status roles (FAVOR's hourly-paid, part-time staff). This was intentional and the empowering nature of Community Cafe in giving participants a voice through the publication of their OER, influenced my choice of FAVOR's title: Finding a Voice through Open Resources.

FAVOR's volunteers would also be committed to tangible action in the creation of OER, to learning from practice, to learning together and from each other. They would participate in the project through the publication of OER under their own names and online profiles, and so there was a more overt intention to encourage practice change through the development of a sustainable online community of open educators.

There were also key differences between the projects: FAVOR participants were all working in mainstream HE, sometimes across several different institutions and had access to training opportunities and institutional resources (at least theoretically). Their teaching contexts were all different. FAVOR held fewer in-person meetings to facilitate the creation and sharing of resources, and adopted a 'blended' approach to achieving project aims: mixing local, in-person meetings amongst groups of teachers with national, online project activities - a blended community of practice (Lave and Wenger, 1991) that was more online than offline.

In devising the project, I emphasised: diversity in the languages represented; working with distantly-located geographical partners to ensure best use of the technical affordance of online sharing and diversity of contexts, and developing the participatory, collaborative approach to the discovery of knowledge.

3.2.3 FAVOR's context in the field

3.2.3.1 Language educators in UK HE

The context for FAVOR was the changing landscape of language education in UK HE and how this was reflected in the teaching workforce. At the time of the project, HE students were moving away from single-honours language degrees towards taking modules on institution-wide language programmes (IWLPs) and joint honours, with language teaching often being provided by Language Centres rather than academic departments (Coleman, 2004: 150; Howarth, 2011). In fact, this was subsequently shown to be a trend and in 2021, a University Council of Modern Languages / British Academic report 'Granular Trends in Modern Languages in UCAS Admissions Data, 2012-18,' recorded a picture of mostly declining numbers in single honours for Modern Languages but a diverse and developing picture in degrees with language combinations.

This change was reflected in the staff delivering teaching with a high number of hourly-paid, part-time educators working on 'teaching-only' contracts with perceived lower status than other academic staff. This was despite that fact that teaching languages in HE demands a high level of professional, specialist experience and skill in an academically-demanding context (Howarth, 2011; Worton, 2009). Staff in this position were likely to be present in the institution only for their teaching and consequently, had limited opportunities for professional development and collegiate practice-sharing.

3.2.3.2 Language educators and training in technology

The rapid development and use of technology for education in this period, led researchers to highlight a general professional development need for language educators: to develop information technology (IT) skills in order to use technology in pedagogically effective ways in their teaching (Compton, 2009; Hubbard, 2008). In the absence of formal training opportunities, it had been noted that sharing experiences within informal communities of practice could offer the chance to learn new skills and knowledge, especially as technological development moved at pace (Hubbard, 2008; Hansen-Smith, 2006). The online space available in our LanguageBox repository had been developed precisely to provide this kind of online space and open sharing of OER offered the means and purpose for engaging with it.

3.2.3.3 OEP and professional development

Synthesis work and reporting from the initial UKOER pilot programme highlighted the possibility of professional development across all disciplines through collaborative open sharing (Beetham et al, 2010) and my earlier OER repository projects had fed into these findings (e.g. Borthwick, 2012). Community Cafe had also demonstrated a link between open educational practice and professional development. Other projects funded in the same strand as FAVOR would also consider this theme (JISC Phase 3 projects, 2013).³⁰

Researchers at the UK's Open University (OU) were using a version of LanguageBox, called LORO, to encourage and explore the sharing of OER between their own language teachers (Comas-Quinn and Fitzgerald, 2013; Beaven, 2013). OU staff are geographically spread, as all courses are online and at distance. The OU team reported that sharing OER through their community repository encouraged collaboration and the learning of new skills (Comas-Quinn et al, 2011). There was an impact on staff development and later evolutions of their work saw them embedding OEP in staff

³⁰ Projects were funded in a range of discipline areas including environmental technology, Business, science and engineering, media, literature and the arts.

development training due to its positive impact on skills development and quality of materials (Alvarez et al. 2013). In 2015, I collaborated with Anna Comas-Quinn on the chapter 'Sharing: open educational resources for language teachers' in the book 'Developing Online Language Teaching' (Hampel & Stickler, 2015). In this chapter, we shared our experiences in giving an overview of the OER-languages context and discussing our own contributions in this area. The chapter is included in Appendix D.

3.2.4 Contribution to knowledge

3.2.4.1 Findings

FAVOR concluded successfully: a significant number of OER related to the study of different languages were newly released as open resources; the online virtual community engaging with each other through the LanguageBox repository was expanded and diversified; project management, approach and guidance/training materials were published as OER; project participants created and published their own commentaries on their learning from the project, and knowledge was gained about the advantages and challenges of open educational practice with this particular group of language educators (FAVOR final report, Appendix C; Borthwick, 2012a).

The power of OEP for professional development and the enhancement of practice was immediately evident in project findings (ibid, p.20). Participants testified to learning new skills (and were observed in doing so) in the creation of digital resources in order to publish OER (ibid, p.14) and also through the reflective, blended, community-networking that took place (ibid, p.14). It was reported that the simple viewing and/or discussion of OER shared by others caused participants to reflect on their own work, learn from others' approaches and enhance the content they created and published individually (ibid, p.10). Engaging in OEP offers a cheap and easy way to enhance professional development and teaching quality through the use and re-use of others' resources.

OEP suited many participants in this group of teachers too, for a range of reasons – the practical engagement with a blended community of practice generated feelings of belonging instead of feelings of low status (ibid, p.16 and previously reported by Howarth, 2011); the neutral, online community space facilitated connections across and beyond individual institutions which suits hourly-paid, part-time working patterns (ibid, p.9); the blended, local/national, community of active open practice model was motivating with teachers feeling proud of their work (ibid, p.16). Teachers of less widely used languages (LWUL) noted additionally that sharing their resources in a neutral space for all languages allowed their experiences to be heard and shared (ibid, p.10) – and

this finding echoed the Community Cafe project (Borthwick & Dickens, 2011: 11). OEP, and its realisation in FAVOR, seemed to be empowering for some participants (Borthwick, 2012a, p.14).

However, challenges arising from OEP for this group of educators were noted too and the same reasons which motivated and united some participants, demotivated and repelled others. It is wrong to assume that all FAVOR participants needed or wanted to 'find their voice' through OER and in fact, some tutors chose their part-time pattern of working deliberately and saw no need or desire for raised profiles or greater integration into their institutions (ibid, p.11). Some participants noted a reluctance to share OER beyond the life of the project, because in the case of unusual LWUL languages, resources were considered to be of high value (of potential monetary or intellectual value, ibid, p.10). General job insecurity discouraged the open sharing of work (ibid, p.11). Other participants were concerned about their right to share their work, as institutions may claim ownership over their work (ibid, p.13). All participants complained of a lack of time to do anything other than teach, as their teaching loads were often intense (ibid, p.12).

Thus, findings from FAVOR show that engaging in the creation and publication of OER had the potential to stimulate language teacher development and enhance the professional lives of hourly-paid, part-time tutors – but not universally so. Significant challenges existed to the realisation of the benefits of open working from institutional practices and processes, as well as the working culture of this particular group of teachers.

As with Community Cafe (see 3.1.4.1), the strength of a collaborative, blended community of practice to enhance teacher practice was demonstrated. Participants frequently noted the appeal of sharing content in a space that was discipline-focused and that existed beyond the boundaries of any one institution (ibid, p. 14 and p.16). Experiencing and demonstrating a sense of shared identity and belonging as part of a particular professional group is a key aspect of an active CoP (Wenger et al, 2002). The opportunity to take part in such a CoP was motivating (Borthwick, 2012a: 9) and the activities inherent in project research work: contributing professional resources, learning from the work of others, receiving feedback from peers and reflecting on practice are all elements that afforded the '[combination] of familiarity and excitement' cited by Wenger et al as a key principle in cultivating a successful CoP (Wenger et al, 2002: chapter 3³¹).

3.2.4.2 Impact

a) National and international impact

³¹ Page number unavailable on the electronic version I consulted.

FAVOR reported into the JISC UKOER programme (see 2.2.4.1) and contributed to JISC's evolving knowledge of open educational practice and how OEP might be sustained into the longer term (McGill et al, 2013; JISC Guides, 2014). The project provided important information from a particular discipline context, with a particular group of UK HE educators, through its outputs and final reporting process. As the project progressed, I regularly presented project work at national JISC meetings. JISC's projects feed into their overall understanding of the landscape of UK education and technology enabling them to give appropriate, informed advice to the government and the sector. FAVOR work and findings were also externally evaluated by an independent researcher (see Borthwick, 2012a: 24).

FAVOR included a dissemination plan which involved participants promoting their work in their local institution through a means of their choice: meetings, newsletters, practice-sharing lunches, etc. (ibid, p.18). Participants were supported in attending conferences to talk about their work and several did so (ibid, p.16). There was national dissemination of project findings and outcomes via LLAS/HEA networks. The dissemination of knowledge by all participants is a feature of PAR projects (Schubotz, 2020: 105) and was a highly rewarding aspect of FAVOR. I presented the project at a number of international and national conferences (see CV in Appendix A). It became evident through interaction with audiences at these events, that the project model (collaborative blended communities of open practice) was as interesting to researchers and practitioners as the outcomes and findings. Once again, project outputs made a sizeable contribution to the store of open, shareable knowledge available to global educators and researchers (Borthwick, 2012a: 18).

b) Individual impact

FAVOR collected data on impact, relating to individuals, institutions and the wider community. Participants reflected upon and reported impact on their professional lives (ibid, p.16-17). As with Community Cafe (see 3.1.4.1), most participants reported improvements to their professional practice through the production of OER and sharing resources within a community repository (ibid, p.16-17). Many participants developed their work in directions which went beyond the project's parameters, e.g. some participants held their own practice-sharing sessions with local colleagues outside of the project, others established local groups to consider issues for hourly-paid tutors' development, some participants adopted more 'digital' ways of working, others involved students in the creation of their OER, or even established new websites of personal OER (ibid, p.17). This kind of unpredictable impact arising from PAR work and driven by the engagement, commitment and ownership of the participants attests to the success of the approach. As previously noted, PAR both requires and builds commitment (David, 2002) and FAVOR participants amply demonstrated the truth of this.

3.3 Extension work: related publications

I co-authored an article arising from FAVOR work, in which I re-examined findings from FAVOR through the lens of motivation. In doing so, I worked with a colleague whose area of expertise is motivation in language teacher development – this is another example of a fruitful collaboration arising from the project (Borthwick and Gallagher-Brett, 2014). I also began to reflect upon the syntheses between the successive OER projects which I had been working on, in terms of the approach to community-building between different groups of language educators and this led to the presentation and short paper ‘One Size doesn’t fit all’ for EUROCALL 2012³² (Borthwick and Dickens, 2012). This paper concluded that consideration of the nature of different communities and the acknowledgement of their different needs was essential for effective community-building and thus, realising the benefits of open educational practice. Both papers can be found in Appendix C.

³² The annual conference of the European Association for Computer Assisted Language Learning.

Chapter 4 Open educational practice and language educators: linking research and teaching

Works relevant to this chapter are in Appendix D.

4.1 The OpenLIVES project

The OpenLIVES (Learning Insights from the Voices of Emigres from Spain) project ran for 15 months, from 2011 – 2013. It was funded as part of JISC’s digitisation activity. The aims of the programme were to create greater amounts of digitised resources (held in difficult-to-access HE archives); support and encourage digitisation activity, and to raise the profile of digital content held in HE (JISC Digitisation and Content programme, 2013). OpenLIVES was funded in strand A³³, which aimed to release educational resources related to digitised content and embed these OER in practice (JISC Digitisation and Content programme, 2013).

This call for projects saw a shift in emphasis from OER practice towards digitisation of content, but I saw an opportunity to progress knowledge of open educational practice with language educators from new perspectives: that of HE language content specialists and students.

4.1.1 4.1.1. Description, aims and methodology of the project

OpenLIVES had 3 partners from UK HE institutions: Southampton, Portsmouth and Leeds. The aims of the project were to digitise and publish as open content a set of research data related to the migration experiences of Spanish emigres, then to use that data to create OER for teaching and learning (Borthwick, 2013a). The desire to transform practice was inherent in my project design, as it explicitly aimed to work collaboratively with academics and students in the creation of content, and then also to embed work into existing curricula. I characterised this in the OpenLIVES final report as engaging practitioners with digital resources in a ‘full cycle’ of use: from the digitisation of research data, through the creation of educational content from that data, to integration into teaching (Borthwick, 2013a).

A collaborative PAR approach was conceived and implemented. I recruited a limited number of partners to contribute different ambitions, experiences and perspectives: the research academic who contributed research data; the educator in professional language skills; the ethnography-

³³ The 2011-13 programme funded 23 projects across 3 strands of activity.

focussed educator, and the educator teaching at all proficiency levels. Perspectives were decided in negotiation with partners and this ensured their ownership in the project and that contributions would be collaborative, meaningful, sustainable and impactful. The process of working through the initial planning stage established a high degree of trust between all participants. As usual, I held multiple roles: deviser and creator of the project, manager, digitiser and creator of OER content, disseminator of knowledge, researcher.

Project work was carried out in overlapping stages: an initial long period of working with original research data (the recorded oral testimonies of Spanish emigres, in Spanish) to digitise and present content as OER; then using that content as the basis to create further OER or utilise OER in teaching.

4.1.2 Research aims and coherence between the materials

This project continued my interest in understanding the rich context of OER use by language educators and added in the new element of driving forward the re-use of OER to create new content thus, the exploration of OEP in action. It worked with content arising from ethnographic approaches in languages that could potentially be re-used in other Humanities disciplines such as politics, economics or history (Borthwick, 2013a: 3). The prospect of fostering inter-disciplinary use of OER was an attractive one, as I had begun to explore interdisciplinary OER in the HumBox project (see 2.2.3) which enabled the publication of OER related to a variety of Humanities disciplines. OpenLIVES also invited students into its explorations by opening up the idea that OER digitised during the project could be re-used in student project work (Borthwick, 2013a: 2).

4.1.3 OpenLIVES' context in the field

4.1.3.1 Spanish language within the Humanities

OpenLIVES responded to strengths and weaknesses in the UK languages landscape. The 2009 Worton review for HEFCE had noted a rise in study of the Spanish language and culture reflecting the popularity of the language; however, this was amidst acknowledgement that overall, the study of languages was in decline (Worton, 2009). The same review identified a need for university departments and other bodies to work together to “promote a clear and compelling identity for MFL as a humanities discipline” which would include showing how historical scholarship and cultural study related to the whole discipline (ibid., recommendation 1, paragraph 206). An open content project like OpenLIVES, with its open and public nature, would contribute directly to the formation and expression of this identity.

In the same year, the British Academy's 'Language Matters' paper highlighted a demand for language skills such as Spanish, in Humanities research, because language skills were low amongst this group of researchers (British Academy, 2009). OpenLIVES aimed to address this skills gap by publishing open linguistic data alongside OER to assist researchers/students in developing that data. The project would also address the traditional tension (Coleman, 2004; Howarth, 2011) between language content (often represented by staff in academic departments) and language skills (represented by staff in Language Centres) by uniting both aspects of the languages landscape in one project with a shared aim. The need for a shared vision for languages uniting disparate stakeholders was highlighted in Worton's 2009 report and in 2011, the Speak to the Future campaign was established as part of a response to this need. It united major language organisations in the UK and still exists in 2021.³⁴

4.1.3.2 Digital humanities

OpenLIVES sat within the context of an increasingly open access agenda in UK research and the early development of detailed open access policies by UK research funding councils. Such policies have evolved further over the last decade, for example, the Arts and Humanities Research Council (AHRC) has consistently developed its open access policy over the last decade making use of a 2012 report as a roadmap for change (AHRC website, 2021). Indeed, the decade has seen a move to policies of open access by default, for projects funded by research councils and UK Research and Innovation (UKRI) published a new open access policy in 2021 that mandates all published work should be immediately open access (UKRI website, 2021).

OpenLIVES work was also part of the landscape of digital humanities in aiming to implement innovative approaches to the publication of research and engagement with research data (Burdick et al, 2012). This engagement with innovation included the idea of working with students as producers of academic content whose work would contribute to public knowledge through open publication. The idea of working with students as collaborators in curriculum development and teaching was gaining increased awareness at this time through the pioneering work of Professor Mike Neary, at the University of Lincoln. Professor Neary argued for the 'creation of richer learning environments' by 'providing more research and research-like experiences as an integral part of the undergraduate experience' (Neary, 2008: 11). Professor Neary's inspirational work includes the establishment of an institutional strategy at the University of Lincoln, 2011-2013, based on working with students as producers of content (University of Lincoln, 2013).

³⁴ <https://speaktothefuture.org/>.

The data used as the basis for activities in OpenLIVES was collected by Dr Alicia Pozo-Gutierrez and other researchers at the University of Southampton, and took the form of oral testimonies from Spanish emigres and other personal artefacts (e.g. images). The core data had been collected in 2008, as part of a research project exploring the experiences of child evacuees during the Spanish Civil War, and had already formed the basis of an exhibition and a book which was going through the publication process at the time (see Pozo-Gutierrez and Broomfield, 2012). As far as the lead researcher was concerned, the core data had no further use and would be archived (and inaccessible). OpenLIVES offered the opportunity to give the oral testimonies further life beyond the research purpose they had been collected for.

The study and collection of oral testimony has been credited with having a significant impact on contemporary history in the twentieth century (Perks and Thomson, 1997). It contributes to social history in the recording of the voices of ordinary people – giving the ‘experiences and perspectives of groups of people who might otherwise be hidden from history’ (Perks and Thomson, 1997: ix). An emphasis on the collection of testimony and other personal ephemera has changed the way that museums present information (Thompson, 2000:13) and the collection of personal testimony often surfaces material which would not normally be discoverable (Thompson, 2000:6). Oral history can be transformational and empowering by giving ‘back to the people who made and experienced history, through their own words’ (Thompson, 2000:3), and as previously noted (see 2.1.2.1), transformation and empowerment are an element of PAR projects. In the digitising and open publishing, of such content, OpenLIVES would contribute to this tradition.³⁵

4.1.4 Contribution to knowledge

4.1.4.1 Findings

OpenLIVES digitised and published open research data in the form of oral testimonies and other personal artefacts alongside Spanish/English transcripts or synopses, and ethnographic notes made by the original researchers (Borthwick, 2013a). These were published as OER in research packages linked to each interviewee.³⁶ It published a range of other OER based on the research data; published student-created OER arising from working with the core research data; information on an innovative Spanish language, final-year module created by the partner at Leeds

³⁵ JISC had recognised the importance of this work and had been funding digitisation projects for some time (JISC Digitisation and Content programme, 2013). Links to JISC’s digitised collections can be found in its Archive Hub <https://archiveshub.jisc.ac.uk/>

³⁶ These open research packages can be found here: <http://humbox.ac.uk/3790/> (see Appendix D)

University including teacher's notes and class activities, and a variety of project documents including videos, project blog, reports (Borthwick, 2013a: 8). JISC requested that ongoing and final reporting should be done in diverse ways (i.e. not primarily through conventional written reports).

OpenLIVES drove forward the integrated use of data in different contexts from that for which it had been collected. It showed that research data could have a rich afterlife in education beyond its original purpose if shared in an open space (Borthwick, 2013a: 9). The project demonstrated that engaging with open content had the potential to change educator practice and all participants reported so (Borthwick, 2013a: 5-7). New skills and approaches in digital education were learnt and implemented with students. In addition, the collaborative method of working in diverse ways across a shared core of content proved to be immensely satisfying for all participants: open working enabled this (Borthwick, 2013a: 7-9). The open publication of the core data ensured that anyone engaging with that data would be free to develop it or respond to it in a way which suited their professional context and preference. The original collector of this data noted herself to be "seduced by the concept" of OEP in seeing this way of continuing and expanding her work (Dr. Pozo-Gutierrez in Borthwick, 2013a: 4). This approach led to creative diversity in how each partner embedded the work into their teaching: either as an ethnographic language module encouraging students to do their own research with local Spanish migrants (Leeds); a professional skills language task which required students to create documentary videos or interactive magazines on migrant experiences (Portsmouth), or the creation of a set of interactive online language learning materials for use at higher language proficiency levels (Southampton), see Borthwick (2013a: 5-7). The materials encouraged diversity and innovation in curriculum tasks rather than homogeneity in approach (Borthwick, 2013a: 9).

The creation of innovative language learning tasks responding to the digital materials also fostered the development of new skills for students, in creating digital content and also understanding issues around open publishing (Borthwick, 2013a: 5). The feelings of satisfaction in working with OpenLIVES research data extended to student collaborators too, who reported drawing inspiration from the materials and finding the tasks motivating and creative (Borthwick, 2013a: 7). Some student collaborators conducted interesting ethnographic and historical projects as part of project work (Borthwick, 2013a: 6-7). The skills and knowledge students acquired through engaging in open educational practice were seen as key aspects of enhancing future employability (Borthwick, 2013a: 7).

The main challenge revealed was in relation to permissions for the publication of existing content in an open space. All of the materials used or produced by the project had to be considered individually to ensure that the correct open licensing and rights were applied, and all third party

contributors were protected (Borthwick, 2013a: 5 and 9). This work dominated the project and presented at times, significant challenges to the progress and viability of the project. This challenge represents an important issue in the development of more open ways of working in HE, both in the re-use of open data and the embedding of open educational practice in teaching.

In terms of contributing to a developing online community of practice, OpenLIVES refreshed the online space with new members, new resources and differently focussed activity. Most of the participants were experienced creators of high quality OER and therefore, performed a leadership role within the community of practice, contributing direction, exemplar content and activity to the online space. In Wenger et al's terms, actors in this type of role legitimise and shape the existence and activity of the community, as demonstrable experts (Wenger et al, 2002: chapter two).

4.1.4.2 Impact

a) National and international impact

OpenLIVES was subject to JISC's robust programme management processes including written and verbal reports at JISC meetings on project progress and interim findings. After one year, I reported on the sustainability of the project. This ensured an ongoing process of evaluation and dissemination of project learnings. As the eContent programme was happening concurrently with the UKOER programme, relevant findings were shared across programmes. In this way, OpenLIVES was able to contribute knowledge and understanding to both programmes. The project provided new dimensions on open educational practice with language educators, particularly in areas of research and student engagement with OER.

The wealth and diversity of OER created by the project contributed to the store of open, repurposable content available for linguists, researchers and educators, and included research data and guidance notes, language learning and history resources (created by staff and students), innovative module information and educator notes, and project methodology. Materials were licensed under Creative Commons and shared in the HumBox (see Appendix D). In addition, a dissemination plan was enacted from the outset, with an expectation that all participants would present project work at conferences and contribute to relevant publications (for example, see Nelson and Pozo-Gutierrez, 2013 and my CV in Appendix A).

Ripples of impact spread out from OpenLIVES in unpredicted directions. The act of publishing the oral testimonies of Spanish migrants, exiles from the Spanish civil war, received attention in Spain through the dissemination efforts of a Spanish member of the project team (Borthwick & Garcia-Guirao, 2012). This led to the story being picked up by other blogs and websites and new

connections and links being made between interviewees and other organisations.³⁷ An internationally renowned singer, Clara Sanabras, who had just recorded an album of songs related to Spanish exile experiences, became aware of the project and wrote a new song, based on the story of Germinal, one of our interviewees. In 2014, the song was performed in a concert at Southampton's Turner Sims hall which interspersed extracts from OpenLIVES oral testimonies with Clara's music.³⁸ Clara went on to meet Germinal in Barcelona and present him with a specially recorded version of his song.³⁹

These serendipitous outcomes are a direct result of publishing open content and of participatory approaches. As with Community Cafe and FAVOR, this project also gave a voice to a particular community (Spanish civil war exiles): OpenLIVES gave history "back to the people who had made it" (Thompson, 2000) and at the same time, gave that history a new existence through the engagement of project partners and their students. The migrants' stories were important historically and OpenLIVES enabled their own voices to be heard. The project both preserved valuable research data for others to access and did justice to the people whose stories we published and worked with (Borthwick 2013a). This project demonstrated that open educational practice can be transformative by dissolving barriers between peoples, generations, institutions and enabling new connections.

b) Individual impact

The immediate impact on educators and students in the project is documented in the final report (Borthwick, 2013a). There was demonstrable and lasting practice change reported by the core project partners and evidenced by their ongoing use of OpenLIVES materials in teaching, and development of personal OEP (Borthwick, 2013a: 9). Their comments indicate that OEP was revelatory in suggesting new ways of working as researchers and educators. For example, at Leeds, project partner Antonio Martinez-Arboleda would go on to play a pivotal role in the adoption of the University's OER policy. He recently commented: *"OpenLIVES is definitively the most influential and transformative project of my whole career. It determined the direction of my research and practice, as well as the education of my students and other students across the World. I would like to express publicly my gratitude and appreciation, personally and*

³⁷ One interviewee passed information about the project to the Fundación Francisco Largo Caballero, an organisation which carries out historical research into trade unionism, emigration and economics. This organisation sent the project team several books related to the economic history of Spain.

³⁸ A report of the concert can be found here, the OpenLIVES blog (Borthwick, 2014c) <https://openlives.wordpress.com/2014/01/03/openlives-inspires-spanish-singersongwriter/>

³⁹ I reported the meeting on the OpenLIVES blog (Borthwick, 2014b): <https://openlives.wordpress.com/2014/02/14/openlives-exile-meets-spanish-singersongwriter/>

professionally, to Kate for all she gave to us” – Antonio Martinez-Arboleda (personal communication [email], August 2021). The transformative aspect of OEP has led some scholars to link it to the idea of threshold concepts (Meyer and Land, 2003). According to Meyer and Land, a threshold concept is: *‘...akin to a portal, opening up a new and previously inaccessible way of thinking about something. It represents a transformed way of understanding, or interpreting, or viewing something without which the learner cannot progress. As a consequence of comprehending a threshold concept there may thus be a transformed internal view of subject matter, subject landscape, or even world view. This transformation may be sudden or it may be protracted over a considerable period of time, with the transition to understanding proving troublesome.’* (2003: 1) Some early HEA/JISC case studies in open education for science and statistics tentatively made this link (see Ehiyazaryan et al, n.d. or Hatherly et al, n.d.) and the notion has been taken up recently by Tur et al, 2020 in a multidisciplinary context. This is an interesting and rich area of exploration as the learning, transformative, and challenging experiences of participants in Community Cafe (3.1.4.1), FAVOR (3.2.4.1) and OpenLIVES (4.1.4.1) indicate that OEP could be a threshold concept in itself and also a means of moving students through discipline-specific threshold concepts.

4.2 Extension project: iTunes and You

The positive reception and outcomes of this project led me to apply for funds to extend and enrich some of the learnings from OpenLIVES. I applied to the JISC/Higher Education Academy Open Resources programme for a related project ‘iTunes and You’ (Borthwick, 2013).

This small case study project would build on the success of OpenLIVES by repackaging some of the OERs into iTunesU educational ‘bite-sized’ resources (Borthwick, 2013: 2). The aim was to investigate how different OERs could have multiple lives in different presentational formats and understand how this might affect engagement with OEP at one institution (Borthwick, 2013: 3). This small project shed light on the difficulties of pursuing an open way of working and enabled me to gain a greater understanding of the context and reality of OEP within one institution. I concluded that technical issues and institutional policies (or lack of them) can be significant barriers to staff engagement with OEP (Borthwick, 2013: 7), and that different methods or spaces for sharing OER contain individual benefits and challenges that can be impactful on engagement (Borthwick, 2013: 7). My work revealed that institutional OER repositories were effective when contextualised alongside a range of spaces for open content, including community-owned spaces, and when institutional OEP policies and support were in place (Borthwick, 2013: 7). Comparison with other work described in chapters 3 and 4, suggested that discipline-specific, community-led online spaces were more appealing and effective in fostering OEP than a generic institutional

space. I created staff guidance information for the University of Southampton library service (who managed UoS iTunesU at that time) but the use of iTunesU has not developed any further. The report is included in Appendix D.

4.3 The XML project

The XML project ran for four months between Jan and April 2014. It was funded by the UK's Higher Education Academy to promote digital literacy in specific disciplines. The programme had strong links to JISC's OER and Digital Literacy work⁴⁰. In the HEA's call for projects, I identified an opportunity to extend my explorations in open practice and language learning by working more closely with students in the production of OERs.

4.3.1 Description, aims and methodology of the project

This short project was conducted working with a colleague from the Spanish Department⁴¹ at the University of Southampton, and her *ab initio* Spanish students. The aim of the project was to develop student digital literacy by asking them to produce digital learning objects (interactive online materials) as OER and as part of an assessed task. The project would principally use the authoring tool Xerte⁴² alongside other tools, for this purpose. The project embedded a structure for the sustainability and cascading of digital skills acquired through project work to other students and staff across the University (Borthwick, 2014: 3).

Preparation and planning began in 2013 to ensure that students would have appropriate support and guidance. Participation at all points was optional (i.e. students who preferred to do the 'old-style' task of delivering an oral presentation and a report could do so). Project activities took place in semester 2, 2014. My role was trainer, advisor, publisher of OER, disseminator of knowledge, researcher.

4.3.2 Research aims and coherence between the materials

This project would shed light on student engagement with the creation of OER and deepen my understanding of the context for OER creation and use in language education. It would seek

⁴⁰ JISC had been developing guidance for institutions and educators around fostering digital literacy skills for some years. They published their work in 2014 and it was archived in 2018.

⁴¹ Irina Nelson.

⁴² <https://xerte.org.uk/index.php/en/>

confirmation in practice of the link between OER creation and digital upskilling and look to understand challenges and drivers in open education from a student perspective.

4.3.3 XML's context in the field

XML reused OpenLIVES OER data (see 4.1) by suggesting students draw on OpenLIVES OERs as source material to create learning objects in the Spanish language. The learning objects would then be used as open language training material for other linguists. The idea of students producing content for open publication drew on Professor Mike Neary's thinking on empowering undergraduate students as producers of academic content (2008). He envisions an 'inclusive academic community where learners, teachers and researchers are all seen as scholars in the common pursuit of knowledge' (2008: 8). He asserts that this ethos will lead to more creative, diverse and richer learning environments (2008: 12) with contributions to knowledge from all participants. This idea has gathered pace since Neary's work and in 2021, the UK government's Office for Students, in a review of digital teaching and learning in response to the COVID pandemic, made one of their 6 key recommendations that students be 'involved in designing teaching and learning' (Barber, 2021).

At the same time as Neary's work, advances in technology were enabling and encouraging greater use of collaborative, creative tasks in the classroom to enhance learning and contribute to the development of digital literacy skills (e.g. Ryberg and Dirckinck-Holmfeld, 2010). The development of digital skills – then as now – was noted as an essential aspect for future employability for staff and students (Beetham and Oliver, 2010: 158). In 2020, Axe et al, identified participatory pedagogy, or co-creation of open content with students, as a developing theme in OER literature (Axe et al, 2020: 69).

Mechanisms and processes for the creation, sharing and re-use of digital learning objects had been a subject of academic and technical discussion for some years (see Downes, 2001), not least at the University of Southampton, where Julie Watson's research into the creation of digital language learning objects had explored effective learning design (Watson, 2010b) and reusability in different contexts (Watson, 2010a). The XML project used a learning object authoring tool called Xerte⁴³. It had an emphasis on ease of use and accessibility, so that no technical knowledge was required from users to create interactive, multimedia, fully accessible resources. Xerte had a growing informal community of developers and users and it was supported by JISC and the HEA to promote the development of digital skills (Xerte Project Overview, 2021). The XML project would

⁴³ Xerte was created in 2004 by a team at the University of Nottingham.

make use of this supported tool to reduce the training load on students, make use of opportunities to feed into the Xerte community of users and ensure the accessibility of outputs.

4.3.4 Contribution to knowledge

4.3.4.1 Findings

The XML project concluded successfully producing a suite of student-produced OER for language learning, and a methodology for integrating a task designed to foster skills in digital literacy. I reported a range of findings in relation to language learning and Xerte (Borthwick, 2014).

Students acquired a range of skills including: using digital tools to create learning materials, learning design skills in considering how to present online content, understanding rights issues around open content, and engaging learners with online content and blended delivery (Borthwick, 2014: 7-9). The task encouraged creativity with many students moving beyond task instructions to produce language beyond their target proficiency levels (as *ab initio* learners) and seeking to embed other authentic Spanish resources in their learning objects (Borthwick, 2014: 8). Their tutor was ‘stunned and impressed’ (Borthwick, 2014: 8) by the results.

Ultimately, the project demonstrated that creating and implementing a digital task with open educational practice at its heart, could be a stimulus for innovation in the curriculum and for creativity in the classroom, confirming findings from OpenLIVES (4.1.4.1). In this respect, the task design was shown to be much more important than the technical tool (Xerte) planned to realise it (Borthwick, 2014: 9). It supported the idea that involving students as producers of content could be beneficial for their learning experience (Borthwick, 2014: 9).

4.3.4.2 Impact: national and individual

The project was evaluated externally (Borthwick, 2014). Learning from the project fed into the HEA’s strand of work exploring and promoting digital literacy in different discipline contexts and JISC’s work in the area. Project findings were published on the HEA and LLAS website, and the project blog; findings were disseminated at conferences (see Appendix A, my CV).

Students were justifiably proud of their work and outputs from the project were used with other cohorts of language learners for information and practice (Borthwick, 2014: 11). Many of our students made use of their skills during teaching placements on their year abroad. Their experiences using Xerte were shared with the Xerte community of users and into the IT team at the University of Southampton (Borthwick, 2014: 10).

Chapter 5 Conclusion: originality and contribution

5.1 Open educational practice

This critical commentary reflects upon published works from a particular point in an evolving journey into open educational research and practice. The works submitted here represent milestones in a trajectory characterised by innovation, collaboration and community engagement. It celebrates my individual expertise developed through rich collaborations. I have deliberately followed a PAR approach that is inclusive, democratic, collaborative and which is represented by diversity in outputs and impact. Impact is reflected on national and international levels, and also on individual participants. This work has encouraged and explored genuine practice change and contributed significant amounts of open scholarly content to the global store of knowledge, where it did not exist before. It has made an important contribution to the shaping of national discussions and guidance around open education and progressed understanding of OEP (Cronin & McLaren, 2018: 130, on impact of the UKOER programme).

My findings build a picture of open educational practice in action, as it relates to language educators, researchers and language students. The work highlighted here involved a large number of participants: educators and students in local and national settings. Findings contribute empirical evidence from a range of perspectives on the challenges, drivers, benefits and disadvantages of open educational practice in language education. This was innovative, exploratory work and makes a tangible contribution to knowledge. In 2013, in recognition of my expertise arising from this work, I was invited to give the keynote address at a conference ‘OER for Languages,’ at the University of Bristol (see my CV in Appendix A). *“I invited Kate Borthwick to be our keynote speaker as a leading authority/scholar in the field. Her well-known e-learning work with language teachers has inspired me personally to better myself as a language educator and to consider and explore a range of teaching methods. It has also shaped the work of many of my language colleagues across the country. Her work on open educational repositories was pioneering...”* (personal communication [email], 2021, Gloria Visintini, former Language Director (TEL), University of Bristol).

Findings from Community Cafe, FAVOR and OpenLIVES (chapters 3 and 4) showed that engaging in open educational practice could be beneficial for language educators in terms of continuing professional development in the use of technology to enhance teaching. Participants acquired new skills in the preparation of materials for open sharing, by learning from the materials shared by others and through interacting with other participants in online and offline community spaces.

The active, purposeful sharing of good practice in community networks and groups was a distinctive feature and strength of this work. Networks worked on multiple levels: nationally and internationally through the online LanguageBox and HumBox repositories; in context-specific online groups in those sites; locally in offline groups or as part of related communities of practice, e.g. the Xerte developer network (XML project). Open collaboration led to creativity and rich engagement, and was clearly satisfying and rewarding for participants. Benefits of enhanced practice for educators in engaging in the publication and re-use of OER were consistent with early predictions and studies (Iiyoshi and Kumar, 2008; Petridis et al, 2010; West and Victor, 2011) as part of the optimistic ‘promise of OER’ (Smith and Casserly, 2006).

5.2 The context of modern foreign languages

For language educators, my findings showed that open education could offer a response to some of the contextual challenges that they face. OEP offers particular potential for this group due to the nature of a language educator’s professional life: e.g. the constant requirement for up-to-date, authentic, useful educational content; the fact that educators are often working in isolation (e.g. on a lesser taught language) or across multiple work contexts (see 3.2). The ‘OpenLIVES’ project found that the publication of open research materials could generate diverse and exciting approaches to teaching language using the same foundational open content. Both OpenLIVES and XML revealed the power of involving students in developing their own open content as part of innovative approaches to teaching language. In a 2014 EU report, Camilleri et al would advocate for OEP as a means to encourage innovative approaches to delivery and realisation of education (Camilleri et al, 2014: 4).⁴⁴

However, findings also shed a critical light on the reality of that promise for language educators: participants identified significant challenges to open practice, including institutional barriers related to infrastructure and processes, a reluctance to share with others (for various reasons), a reluctance to re-use the work of others (often termed ‘not-invented-here’ syndrome), a lack of technical knowledge and legal and policy obstacles (see 3.2.4.1 and 4.3.4.1). Such issues were also reported by the EU’s OPAL project which also found that a lack of institutional support, a lack of technical skills and trust issues hindered development of OEP (Ehlers et al, 2011: 159).

Overall, my work shows that the context of subject discipline and educators’ professional lives is important in understanding the drivers and barriers to OEP adoption and an individual’s

⁴⁴ In a 2015 co-authored chapter, with Anna Comas-Quinn, I shared experience about much of my work (including projects submitted here and earlier work on OER repositories). This is included in Appendix D (Comas-Quinn and Borthwick, 2015).

institutional context is a powerful factor in engagement. Whether an institution has an infrastructure enabling and encouraging OER development, a policy for the open sharing of work or even simply a willingness to allow open sharing to go on, will impact on an individual's engagement with OEP. Similarly, the context of subject discipline provides the purpose and motivation for the development of OEP.

The importance of context was reported in JISC's final UKOER programme synthesis report: "[there is] empirical evidence of emerging OEP through activities around OER. However, these journeys appear to be highly contextualised... We have significant evidence that HEFCE funding has enabled transformation, as individuals, communities and institutions involved in funded OER initiatives have moved substantially further along in their OER and OEP journeys, regardless of their initial starting points." (McGill et al, 2013). The importance of discipline context would also be affirmed in a case study of OER use with language educators at the Open University (Comas-Quinn and Fitzgerald, 2013).

5.2.1 The community of practice

An essential aspect of the context of language teaching and learning in this work, was the integrated and related structure of communities of practice (CoP). In all of the work described here, there was a mixture of offline, online, local, national and international CoPs feeding into and informing each other. I designed each new research project to both make use of the affordances of this diversity and allow for flexibility in participant engagement. This approach facilitated the development of the online open CoP in the LanguageBox, as it enabled open practices ranging from those simply viewing content, to those engaging in a peripheral way through the creation and sharing of a small number of OER, to those sharing a large number of OER, reusing/commenting on the work of others and using the space flexibly to support their own practice in individual ways. This depth and range of engagement, from observer to leader, in effective CoPs is noted in research (Wenger et al, 2002: chapter 3). The interplay in these relationships is important in enabling OEP to flourish, as participants experiment, develop confidence, then become proficient open practitioners who fully own and drive their engagement with OEP. The online community space represented a democratic, subject discipline focused, safe space to learn from (and teach) fellow practitioners.

The active, exploratory projects described here were effective in refreshing and sustaining the online CoP; however, as that direct activity has ceased, so the CoP in the LanguageBox has diminished (although it still exists in 2022). Even for community OER-sharing spaces, there is an ongoing need for maintenance and technical development by organisations or educational

institutions and this requires strategic policy and resource. I have found that effective CoPs have been realised again in the Massive Open Online Courses (MOOCs) that I create. MOOCs offer a structured, institutionally-supported way to present OER, as well as an online space to collaborate and share practice. The integration of MOOCs into institutional processes, related courses of learning and other structures ensures renewal and sustainability. This lived experience supports the idea that institutional policies and support are significant in developing OEP and in realising the related benefits of engagement.

5.2.2 Language educators' professional lives in the present day

The context of language educators' professional lives remains an important factor in the adoption of OEP. Writing this in 2021, looking back over a decade of work in open education and languages, I note that many of the support structures that existed ten years ago for UK language teaching and learning have disappeared or been drastically reduced: LLAS, CILT, LORO, as well as local government support for Southampton's community-based language teachers are all gone; financial restructuring at governmental level means that modern foreign languages are no longer designated as 'strategically important and vulnerable.' Significant projects like Routes into Languages have been greatly reduced. And yet, the challenges that I mentioned in section 1.3 facing MFL as a subject discipline remain consistent. The 2002 DfES strategy 'Languages for All: languages for life,' promoted language learning in the UK partly to address declining student numbers. However, the need to do more to promote language skills and knowledge has remained a consistent cry since then and recent years saw the publication of another document calling for a coordinated national development strategy for language skills: 'Towards a national language strategy' (2020) by the British Academy, the Arts and Humanities Research Council, the Association of School and College Leaders, the British Council and Universities UK. The campaign 'Speak to the Future,' established in 2011, to bring together the disparate stakeholders in language education in a single voice, still exists in 2021.

Similarly, the rapid move online during the COVID pandemic has led to further appeals for language teacher development in digital skills: in an initial survey by the European Council of Modern Languages (ECML) into language teacher responses to the COVID pandemic, it was found that teachers felt a need for professional development in digital skills and suggested that learning through communities of collaborative practice would be a way for teachers to develop key digital education skills (ECML, 2021a). Thus, it seems that the context for language teaching and learning has become no less challenging over the last decade, and open, digital, collaborative support networks, in communities of practice, are more important - and needed - than ever.

5.3 OEP and OER in 2021

So in 2021, I find that there is still work to do to understand educator practices with OER and open education. Later studies have affirmed that educators' use of OEP continues to be "complex, personal, contextual and continually negotiated" (Cronin, 2020: 158), but that evidence of actual reuse of existing OER and sharing is scant (Beaven, 2018), while a "lack of perceived benefits for particular disciplines" has been highlighted as a hindrance to uptake of OER (Conole and Brown, 2018: 196). In recent years, there have been further calls for research into educators' OER practices and OER pedagogies on the basis that there is still very little work in this area (Camilleri et al, 2014; Hassler et al, 2014; Bradley and Vigmo, 2016), alongside calls to address a research gap related to students' perceptions and experience of OEP (Axe et al, 2020). In 2020, Catherine Cronin was still calling for "culture change" in institutions and for open educators to develop their own networks and "democratic, flexible, strategic and critical" approaches in order to realise benefits of OEP (Cronin, 2020: 159). It is clear that there is still much to understand about the complexities of realising OEP and the use and re-use of OER in HE and other educational contexts.⁴⁵

5.4 PAR and OER

A key dimension in the context of my work is the PAR approach. "PAR projects are transformative and praxis orientated" (Schubotz, 2020: 105) and through the projects discussed here, the PAR approach has demonstrated its suitability for exploring and disseminating open educational practice and for encouraging transformation in educational practice. A flexible, democratic, collaborative approach ensured high levels of ownership, creativity and contribution from all my participants. In this respect, the approach aligns well to Cronin's 2020 call for open educator networks and approaches (ibid. 2020: 159). The projects discussed here were empowering in varied ways and gave language educators, students and other participants 'a voice' through the publication of their own OER and dissemination of project work. "Empowerment is central to PAR approaches" (Schubotz, 2020: 105). At the same time, there was sufficient scaffolding in my projects' design to support and develop context-specific, pedagogical approaches to developing OER – the absence of which has been cited as a criticism of the OER movement (Knox, 2013; Bradley and Vigmo, 2016).

⁴⁵ In the context of one type of open content, Language MOOCs, there is also an emerging body of work. See Martin-Monje and Barcena, 2015; Sallam et al, 2020; Martin-Monje and Borthwick, 2021.

The approach has been an essential and integral element in my research journey and has ensured a diverse, enduring, diffuse impact – not least upon me personally. The themes of collaboration, community and openness underpin my professional practice to this day. Open education, community and collaboration are represented in my current career in various ways: I have built a national and international reputation as a MOOC designer through the creation and editing of a range of open courses for Languages and the Humanities (see for example, Borthwick, 2018b; Borthwick, 2020) and am an active innovator in the creation of open courses. The establishment of this reputation played a role in my being elected Vice-President of the European Association for Computer Assisted Language Learning; the University of Southampton's lead for open online courses, and a committed open access publisher (as the author of articles and editor of multiple collections of community work). I am secretary of the EUROCALL Language MOOC Special Interest Group and with the Chair of that group (Professor Elena Martin-Monje) co-edited a special issue of the journal *ReCALL* in May 2021, devoted to LMOOC research. The rewarding community engagement and collaboration inherent in these roles is why I do them. In 2021, the University of Southampton MOOC programme team, which I lead, was awarded an AdvanceHE Collaborative Award for Teaching Excellence⁴⁶. The application for the award required me to explain the method, efficacy and impact of the MOOC programme team's collaborative way of working on teaching and learning. It enabled me to articulate and promote an ethos which is founded in the work described here. I am the co-editor of six collections of work devoted to innovation in language teaching (see Appendix A). These were deliberately published as open access works. I have also been (in the past and currently) co-investigator on several open education or MOOC-related research projects, e.g. a project exploring the blending of MOOCs into ELT teacher training (see Orsini-Jones et al, 2018), or a current collaboration with a university in Brazil using a MOOC as a focus for explorations of internationalisation in practice⁴⁷. In December 2021, I was invited to give a keynote address on the topic of open educational resources for language learning and teaching and I spoke about the evolution and development of language MOOCs as a response to issues of sustainability and pedagogy in OER.⁴⁸ All of these activities have made an important contribution to the more open philosophical and pedagogical approaches that are widely accepted and promoted today.

⁴⁶ A report of our win: <https://www.southampton.ac.uk/blog/sussed-news/2021/08/05/mooc-teams-achievements-recognised-by-advancehe/>

⁴⁷ This project is funded by the British Council (BC) and our Brazilian partner is the Universidad Federale de Minas Gerais. The project is funded under the digital capability and internationalisation work of the BC.

⁴⁸ This presentation was given on 10 December 2021. The presentation can be viewed here: <https://www.youtube.com/watch?v=Dv6dwjKLLeY> (from minute 8.38)

And yet, despite the manifest rewards, impact and benefits of collaboration, as an approach, PAR was challenging to implement. It requires the researcher to motivate a disparate group of people, while tolerating and encouraging diversity and flexibility over nearly every aspect of how a project progresses. As an academic working in UK higher education today, the shared ownership and democracy of PAR poses personal challenges. HE is a culture that traditionally prizes individual capability and specialism, and institutional processes of promotion and recognition reinforce this – pursuing democratic, participatory research does not fit easily into this context.

Despite these challenges, I find that PAR approaches are rewarding and as a means for exploring open education are appropriate and impactful: it is an approach suited to its field. It is an approach suited to the age we live in: the last decade has only seen *more* sharing, *more* collaboration and increased public expression of individual voices using technology (social media) to be heard – these are voices often demanding change or social justice, e.g. the movements associated with #MeToo, #BlackLivesMatter.⁴⁹ Such online social movements indicate that technology is altering whose voices are heard and how loudly, challenging traditional structures and notions of who creates, disseminates and owns knowledge. In this context, PAR approaches come of age.

Adopting such an approach means that contribution is not diminished but shared: it is not just the work of one person, one book or article, it is diffuse, shared, wide-ranging, impactful in different areas and sometimes significant with national or international reach and sometimes only knowable or evidenced on an individual. These explorations into open education show that a successful participatory approach holds the possibility of real impact and practice change. Lewin's assertion is as true today as it was in 1946: "research that produces nothing but books will not suffice" (1946: 35). This could be a clarion call for 21st century, digitally-enabled researchers.

⁴⁹ #MeToo is a social movement empowering victims of sexual abuse or harassment to share their stories online using the hashtag. Many victims felt able to tell their (previously unheard) stories in this way and connect with other victims. #MeToo rapidly became a global movement via social media. It has led to increased awareness and discussion of the issue (Time, 2021). #BlackLivesMatter is a hashtag first used in 2013 to draw attention to issues of racism and police brutality in the USA. It has also become a global movement via social media use of the tag (Newsweek, 2021).

Appendix A CV, selected bibliography of relevant publications

Edited works – contributions (chapters)

Borthwick, K. (2021). Complexity and simplicity during COVID-19: reflections on moving pre-sessional programmes online at pace. In Plutino, Alessia; Polisca, Elena (Eds), *Languages at work, competent multilinguals and the pedagogical challenges of COVID-19* (pp. 79-87). Research-publishing.net. <https://doi.org/10.14705/rpnet.2021.49.1221>

Borthwick, K. (2020) 'Treasuring and preserving languages: how the inclusive design in MOOCs might help,' in Plutino, A., Borthwick, K., Corradini, E. [eds] *Treasuring languages: innovative and creative approaches in HE*, Dublin: research-publishing.net <https://research-publishing.net/manuscript?10.14705/rpnet.2020.40.1059>

Borthwick, K. (2018a) 'Support unsung heroes: community-based language learning and teaching' in Kelly, M. [ed.] *Languages after Brexit*, Palgrave Macmillan.

Borthwick, K. (2018b) 'What our MOOC did next: embedding, exploiting and extending an existing MOOC to fit strategic purposes and priorities.' In M. Orsini-Jones, & S. Smith (Eds.), *Flipping the blend through MOOCs, MALL and OIL – new directions in CALL* (pp. 17-23). Researchpublishing.net. DOI: 10.14705/rpnet.2018.23.9782490057160

Comas-Quinn, Anna and Borthwick, Kate (2015) Sharing: open educational resources for language teachers. In, Hampel, R. and Stickler, U. (eds.) *Developing Online Language Teaching*. Basingstoke, GB, Palgrave Macmillan, 96-112. (New Language Learning and Teaching Environments).

Borthwick, K., and Dickens, A. (2013) The Community Café: Open Practice with Community-based Language Teachers in (eds) Beaven, A., Comas-Quinn, A., Sawhill, B. *Case Studies of Openness in the Language Classroom* <http://research-publishing.net/publications/2013-beaven-comas-quinn-sawhill/about-the-book/>

Books – Edited collections

Borthwick, K., and Plutino, A., [Eds]. (2020). *Education 4.0 revolution: transformative approaches to language teaching and learning, assessment and campus design*. Research-publishing.net. <https://doi.org/10.14705/rpnet.2020.42.9782490057665>

Plutino, A., Borthwick, K., Corradini, E. [eds] (2020) *Treasuring languages: innovative and creative approaches in HE*, Dublin: research-publishing.net <https://research-publishing.net/book?10.14705/rpnet.2020.40.9782490057603>

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Conference Contributions – Refereed

Borthwick, K. and Dickens, A. (2012) 'One Size Doesn't Fit All: Contrasting Approaches to Building Communities of OER Users Amongst the Language Teaching Community' in *EuroCALL Conference 2012 short papers*, 22-25 August 2012 in Gothenburg, Sweden. <http://research-publishing.net/publications/2012-eurocall-proceedings/>

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McSweeney, P., Borthwick, K., Hargood, C., Millard, D. and Howard, Y. (2011) 'The Mechanisms and Impact of Encouraging Community Engagement in Teaching Repositories'. In: *Open Repositories 2011*, July 2011, Austen, Texas.

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Journal Papers - Academic Journals

Martin-Monje, E. & Borthwick, K. (2021) Special Issue: Researching massive open online courses for language learning and teaching [guest editors] *ReCALL*, 33 (2)
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Martín-Monje, E., & Borthwick, K. (2021). Introduction: Researching massive open online courses for language teaching and learning. *ReCALL*, 33(2), 107-110. doi:10.1017/S0958344021000094

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Journal Papers - Professional Journals

Borthwick, K. (2010) 'The Community Café Project: sharing tea, cake and online teaching resources' in *ALISS Quarterly*, Vol. 6 (1), pp.23-25 <https://issuu.com/alissinfo/docs/october2010>

Borthwick, K. (2010) 'Publish and be famed' in *Viewfinder*, British Universities Film and Video Council, vol. 80, pp. 8-9. <http://bufvc.ac.uk/publications/viewfinder-archive/viewfinder-80>

Official Reports: Whole Report

Orsini-Jones, M., Conde, B., Borthwick, K, Zou, B & Ma, W. (2018) *BMELTT: Blending MOOCs for English Language Teacher Training*, Teaching English, ELT Research Papers 18.02, British Council, J121.
<https://www.teachingenglish.org.uk/article/b-meltt-blending-moocs-english-language-teacher-training>

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Borthwick, K. (2012) *The FAVOR project final report*. JISC

Borthwick, K. and Dickens, A. (2011) *The Community Café final report*

Other Publications - Research Equivalent

The Community Café workshop pack (with Alison Dickens), 2011

Selected relevant conference/event attendance

Dates	Title	Nature of involvement
10 December 2021	'Community and context: the power and purpose in developing OEP,' at Erasmus+ project OPENLang Network [Open Languages & Cultures], "Open Educational Resources and Practices in Language Learning and Teaching", online multiplier event https://www.youtube.com/watch?v=Dv6dwjKLLeY	Keynote speaker (invited)
21 April 2020	'A MOOC for all seasons: a case study of how learners and developers use 'EMI for Academics' MOOC in professional practice,' at 'Language studies variation and standardization at a nonlinguistic university,' 3 rd International research and practical conference, National Research Lobachevsky State University of Nizhny Novgorod, Russia	Invited presenter
25-26 October 2019	'The ripple effect: a case study of how teachers use EMI for Academics MOOC in professional development.' International Conference: MOOCs, language learning and mobility, Open University, Milton Keynes, UK, 25-26 October 2019	Presenter and invited plenary panel speaker
10 May 2019	Webinar: MOONLITE online vision-building event on the future of inclusive online education https://play.lnu.se/media/t/0_3h31peg3/	Invited speaker
22 – 23 July 2016	'Lessons learnt from FutureLearn's Understanding Language: Learning and Teaching: MOOC design, implementation and evaluation,' ChinaCALL International Symposium on CALL, Qingdao, China.	Invited speaker at symposium on MOOCs
21-23 April 2016	'Is 'free' possible and desirable? Issues around open content in 21 st century higher education,' delivered by skype to III Scientific and Methodological Seminar 'Professional Training of Students of a Technical University in a Foreign Language: developing the pedagogical and language skills of teaching staff,' Tomsk, Russia	Invited speaker
10 December 2015	'Making a MOOC: exploring its value for recruitment. A case study from the University of Southampton,' British Council SIEM (Services for International Education Marketing) conference, Edinburgh International Conference Centre	Invited panel speaker
19-21 November 2015	'Creating a MOOC – is it worth it? The view from the University of Southampton' delivered by skype to the 2nd Scientific and Methodological Seminar "Professional Training of Students of a Technical University in a Foreign Language: Developing the Pedagogical and Language Skills of Teaching Staff" Russia, Tomsk	Invited speaker

Appendix A

25-29 August 2015	EUROCALL 2015, Padua, Italy. 'The course designer's tale: issues, influences and impact in the creation of the MOOC 'Understanding Language: learning and teaching'	Presenter
19 Sept 2014	Webinar panelist for LangOER project: 'Open Educational Resources for less used languages in an increasingly digital culture,' http://blogs.eun.org/langoer/2014/08/21/upcoming-webinar/	Invited speaker
20-23 August 2014	'OER: insights into a multilingual landscape,' on OER and languages. EuroCALL 14, Groningen, the Netherlands,	Presenter as part of symposium
20-23 August 2014	Borthwick, K. and Nelson, I. (2014) 'The XML project: digital literacy and learning design in a Spanish ab initio curriculum,' EuroCALL 14, Groningen, the Netherlands,	Presenter
20 September 2013	Keynote address: 'My life on the OER ladder: a personal history of language teachers and openness,' at the conference 'Open Educational Resources for languages' at University of Bristol	Invited opening keynote speaker
19 September 2014	LangOER project: 'Open Educational Resources for less used languages in an increasingly digital culture,' http://blogs.eun.org/langoer/2014/08/21/upcoming-webinar/	Invited webinar panelist
10-13 July 2013	'Shaken and stirred: maximising the benefits of open practice through 'blended' OER communities of language teachers' at WorldCALL, Glasgow, 10-13 July 2013	Presenter
26-27 March, 2013	'Open academic practice in action: research to teaching and back again in the OpenLIVES project' at OER13: Creating a Virtuous Circle, Nottingham, 26-27 March, 2013	Presenter
22-25 August 2012	'One size doesn't fit all: contrasting approaches to building communities of OER users amongst the language teaching community', European Association for Computer Assisted Language Learning (EUROCALL) annual conference, 2012, Gothenburg, Sweden	Presenter
5-6 July, 2012	'Coming in from the cold: recognition and reward for part-time language tutors in the FAVOR project' at Languages in Higher Education Conference, Edinburgh, Scotland	Presenter
5-6 July, 2012	Borthwick, K. & Martinez-Arboleda, A. (2012) 'When research met teaching: publishing, collaborating and students as producers of open educational resources in the OpenLIVES project' at at Languages in Higher Education Conference, Edinburgh, 5-6 July, 2012	Presenter
June 1st 2012	'Engaging Language Educators: OERs and Staff Development' at HEA seminar Open Educational Resources in Languages, UCLAN, Preston UK	invited presenter

Recent career history:

2019 - Chair, University Digital Education Working Group appointed by VP Education and reporting to University Education Committee

2018 – present Principal Enterprise Fellow (educational innovation), Faculty of Arts and Humanities; Director, Open Online Courses (MOOCs), University of Southampton with responsibility for leading the University partnership with Futurelearn and developing MOOC strategy

2016 – 2018 Senior Enterprise Fellow (educational innovation), Faculty of Humanities, University of Southampton

2013 – 2016 Senior Academic Coordinator, Centre for Languages, Linguistics and Area Studies (LLAS), University of Southampton

2008-2013 Academic Coordinator (elearning), Centre for Languages, Linguistics and Area Studies (LLAS), University of Southampton

Education:

MA in Linguistics and English language: Media Technology for Teaching English to Speakers of other Languages, **Distinction**, Newcastle University, UK, 2002

MA Honours Modern Languages (Russian) with integrated Year Abroad, **First class**, University of St Andrews, Scotland, 1996

Major honours and distinctions

Honour/distinction	Date awarded
Vice-chancellor's Award for Internationalisation (individual)	July 2016
Vice-chancellor's Teaching Award (for innovation)	July 2018
2021 AdvanceHE Collaborative Award for Teaching Excellence (CATE), MOOC programme team	August 2021

Membership of professional and learned societies

<ul style="list-style-type: none"> Vice-President of the European Association for Computer Assisted Language Learning (EuroCALL), elected in 2021. Executive Board member since 2016. Secretary of LMOOC Special Interest group (Eurocall). Fellow of the Higher Education Academy since 2013. Associate Member of the Association of Learning Technology
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Appendix B Collaboration statements

Collaboration Statements for co-authored work

B.1 Collaboration statement on co-authored work: Alison Dickens

I am the primary author of the articles listed here and of the project reports.

In relation to the **Community Cafe Project** and related article: Alison Dickens was a collaborator on this project and the activities related to the project were delivered working together. As my line manager, she took on a supervisory role in the project in general and contributed her expertise into the creation and running of Language Cafes and workshop design and facilitation. I contributed my knowledge and experience of teacher training in the area of technology, technical knowledge and expertise in open educational resource creation/practice. I was the primary author of the project report and of the article cited here.

In relation to the **FAVOR project**: Alison Dickens was my line manager at the time of the project and took a supervisory role in the project. I conceived the project, put the multi-institutional partnership together, wrote the successful bid, ran the project and carried out the final evaluation and reporting.

I am happy to certify the above statements as true:



Alison Dickens



Kate Borthwick Date:

13th February 2020

B.2 Collaboration statement on co-authored work: Angela Gallagher-Brett

This statement relates to the article:

Borthwick, K., and Gallagher-Brett, A. (2014) 'Inspiration, ideas, encouragement': teacher development and improved use of technology in language teaching through open educational practice, *Computer Assisted Language Learning*, Vol. 27 (2), pp. 163-183

This article was co-authored and each author contributed particular and distinct expertise. The idea for the article arose from my work and findings on the FAVOR project. I approached Dr. Angela Gallagher-Brett, who has expertise in the area of motivation and language teaching. We worked together to design the research project for our article, I gathered data. In the article, we were responsible for writing up areas of our own expertise and we worked closely together on the analysis from our different perspectives. This is an example of how open working and open project work can encourage fruitful collaboration with researchers in related areas.

I am happy to certify the above statement as true:



Angela Gallagher-Brett



Kate Borthwick

4 August 2021

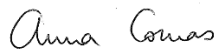
B.3 Collaboration statement on co-authored work: Anna Comas-Quinn

This statement relates to the chapter:

Comas-Quinn, A. & Borthwick, K. (2015) Sharing: open educational resources for language teachers. In Hampel, R. and Stickler, U. (eds.) *Developing Online Language Teaching: research-based pedagogies and reflective practices*. Basingstoke, GB, Palgrave Macmillan, 96-112.

This chapter was co-authored with Dr Anna Comas-Quinn, Open University. Each author contributed expertise from their own areas of work. I authored the section 'Open Educational Practices' and 'Repositories and online sharing.' We reviewed and edited each other's sections. It celebrates our individual knowledge and research in open education with language teachers through a collaborative work.

I am happy to certify the above statements as true:



Dr. Anna Comas-Quinn

Date: 10th September 2021



Kate Borthwick

Date: 10th September 2021

Appendix C Community Cafe, FAVOR

Copies of publications will be made available to examiners.

- 1) Community cafe final report: Borthwick, K. and Dickens, A (2011) *Community Cafe Final Report*, JISC. Originally published on the JISC website, now available via ePrints.
https://eprints.soton.ac.uk/192825/1/Community_cafe_final_report_2011.pdf
- 2) Peer-reviewed journal article: Borthwick K., Dickens A. (2013), The Community Café: creating and sharing open educational resources with community-based language teachers, *Journal of e-Learning and Knowledge Society*, v.9, n.1, 73-83. ISSN: 1826-6223, e-ISSN:1971-8829
<https://pdfs.semanticscholar.org/2690/639385f45f1c901e8238c7b46ddb8bed3aeb.pdf>
- 3) Outputs from the project: all resources including OERs created by participants, guidance and workshop materials created by the author and the project team
http://languagebox.ac.uk/view/keywords/community_cafe.html
- 4) Related book chapter: Borthwick, K. (2018) 'Support unsung heroes: community-based language learning and teaching' in Kelly, M. [ed.] *Languages after Brexit*, Palgrave Macmillan.
- 5) FAVOR project final report: Borthwick, K. (2012) *The FAVOR project final report* JISC. Originally published on the JISC website, now available via ePrints.
https://pure.soton.ac.uk/admin/files/14198225/FAVOR-Final-report_2012_eprints.pdf
- 6) Peer-reviewed journal article: Borthwick, K., and Gallagher-Brett, A. (2014) 'Inspiration, ideas, encouragement': teacher development and improved use of technology in language teaching through open educational practice, *Computer Assisted Language Learning*, Vol. 27 (2), pp. 163-183
- 7) Peer-reviewed short paper: Borthwick, K. and Dickens, A. (2012) 'One Size Doesn't Fit All: Contrasting Approaches to Building Communities of OER Users Amongst the Language Teaching Community' in *EuroCALL Conference 2012 short papers*, 22-25 August 2012 in Gothenburg, Sweden. <http://research-publishing.net/publications/2012-eurocall-proceedings/>
- 8) Outputs from the project: all resources including OERs created by participants, guidance materials created by the author, reporting docs from the project team
<http://languagebox.ac.uk/view/keywords/favor.html>; final reports from each institutional partner
<http://languagebox.ac.uk/3118/>

Appendix D OpenLIVES, XML project

Copies of publications will be made available to examiners.

- 9) OpenLIVES final project report: Borthwick, K. (2013) *OpenLIVES Final Report*. Originally published on the JISC website, now available via ePrints
https://pure.soton.ac.uk/admin/files/86181219/9.openlives_final_report_borthwick.pdf A project overview is archived by JISC: <https://archiveshub.jisc.ac.uk/search/themes/12b34dd5-685a-32be-bc67-de748db67396>
- 10) The digitised OER collection, project blog, final reporting video, directed and produced by Kate Borthwick. Open education resources, presentations by the project team
<http://humbox.ac.uk/view/keywords/openlives.html>; Project blog: <https://openlives.wordpress.com/>; The digitised collection: <http://humbox.ac.uk/3790/>; final reporting video: <https://www.youtube.com/watch?v=qeocSbDlFKE>
- 11) Final project report for 'iTunes and You': Borthwick, K. (2013) *iTunes and You*, Higher Education Academy. Originally published on the HEA website, now available via ePrints
https://pure.soton.ac.uk/admin/files/86181245/11.itunesandyou_Borthwick_case_study_HEA.pdf
- 12) Final project report for the XML project: Borthwick, K. (2014) *The XML project: Xerte and Modern Languages*. HEA. Originally published on the HEA website, now available via ePrints
https://pure.soton.ac.uk/admin/files/86181283/12.XML_final_report_Borthwick2014.pdf.
- 13) XML project blog <http://blog.soton.ac.uk/xmlproj/>
- 14) Co-authored chapter (drawing on all work and experience): Comas-Quinn, A. & Borthwick, K. (2015) Sharing: open educational resources for language teachers. In Hampel, R. and Stickler, U. (eds.) *Developing Online Language Teaching: research-based pedagogies and reflective practices*. Basingstoke, GB, Palgrave Macmillan, 96-112.

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Beetham, H. & Sharpe, R. (eds), (2020) *Rethinking Pedagogy for a Digital Age*, 3rd edition, Routledge: New York

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- Borthwick, K. (2020) 'Treasuring and preserving languages: how the inclusive design in MOOCs might help,' in Plutino, A., Borthwick, K., Corradini, E. [eds] *Treasuring languages: innovative and creative approaches in HE*, Dublin: research-publishing.net <https://research-publishing.net/manuscript?10.14705/rpnet.2020.40.1059>
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