Development of the OCW Consortium

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Abstract—**This paper documents the development of the OpenCourseWare Consortium, from the origins of the OCW concept at MIT and that Institute's early commitment to supporting other adopters of the model, to the rapid growth of the community in the period 2004-2007, to the Consortium's incorporation as an independent entity and current activities and status.**

Keywords-OpenCourseWare; open educational resources

I. A New Model for Open Sharing

In the year 2000, an MIT faculty committee on lifelong learning made a proposal that was as simple as it was revolutionary. The committee was charged with recommending a strategy for MIT in confronting the growing impact of the Internet on higher education, and in particular, in confronting the emerging field of digitally supported distance learning. After surveying the online education landscape, they saw that distance learning was both difficult to provide profitably and at some level fundamentally at odds with the Institute's mission to disseminate knowledge. Online education—as it was conceived at the beginning of the century—would take the academic riches of the Institute and lock them behind a firewall for only those who could pay.

Instead, the committee proposed, why not use the Internet to give away the academic content at use in MIT's classes? Rather than trying to create entire new programs specifically designed for online delivery, why not take the core academic documents already created at the Institute—the syllabi, lecture notes, assignments and exams handed out in MIT classrooms—and make them widely and freely available on the World Wide Web? Instead of pursuing profit, as was the prevailing model, the committee suggested the goal should be generating global benefits through a philanthropic approach. They further proposed that MIT should share materials not from a select few courses, or from the subjects for which the Institute was best known, but from the entire MIT curriculum, undergraduate and graduate.

In sharing these materials, the committee hoped to provide educators around the world resources they could build upon in creating materials for their own classrooms. They also hoped to provide students everywhere with access to additional resources to supplement the materials they received in their classes. Independent learners, too, might benefit from accessing theses materials to learn for pleasure or to solve professional problems. Rather than online instruction, the committee hoped to provide open resources that would benefit the widest possible population and change the overwhelmingly commercial direction of online higher education.

As sweeping as this vision was, the faculty had a more ambitious idea. They recognized that if MIT undertook such a program, it might provide benefit to hundreds of thousands, maybe millions, but the concept—which they dubbed OpenCourseWare (OCW)—would not fundamentally change education unless it was widely adopted by universities around the world. As they sought funding to start the program, which was quickly provided by the William and Flora Hewlett and Andrew W. Mellon foundations, they proposed that in addition to publishing all of MIT's educational materials, the team assembled would also provide advice and assistance to other schools seeking to publish their materials openly.

It was this commitment that would, in five short years, result in an independent organization with a globally distributed staff that serves the needs of more than 200 universities and affiliates—the OpenCourseWare Consortium.

II. A Shared Mission

While the MIT team had been tasked with helping other universities with adopting the OpenCourseWare model, they fully expected it would take several years to prove the effectiveness of the model before OpenCourseWare began to see widespread adoption. The mission of sharing educational materials openly and freely, however, was itself far more resonant that anyone at MIT had expected.

Almost as soon the MIT OpenCourseWare site was launched in 2003—with no advance contact—another OpenCourseWare site appeared on the Web. The Fulbright Economics Teaching Program OpenCourseWare site (http://ocw.fetp.edu.vn/home.cfm) launched in the fall of 2003 as well, with the following reference to MIT's program on the home page:

> *Inspired by the Massachusetts Institute of Technology's OpenCourseWare Initiative (OCW), the Fulbright School has begun to publish its teaching and research materials online. FETP OpenCourseWare is not a long distance learning project, rather it is a resource for people working or studying in policy-related fields to increase their knowledge and explore new approaches to learning and curriculum development.*

Beginning in early 2004, before evaluation of the early stages of MIT's program had been published, MIT began to receive inquiries and invitations to speak from universities in the United States and around the world. During 2004 and into 2005, the MIT OpenCourseWare team spoke with leading universities in Japan and in France, as well as US schools including Johns Hopkins, Notre Dame, Tufts and Utah State University.

The common thread connecting all of this communication was a commitment to the mission of openly sharing educational materials. Tufts University already maintained extensive international partnerships, and OCW was seen as a natural extension of these commitments. Johns Hopkins Bloomberg School of Public Health saw OCW as a powerful new tool they could employ in the service of global health. For Utah State University, OCW enhanced the school's ability to serve the residents of Utah. Notre Dame saw OCW as a way to give global visibility to their specialty in ethics. Even before MIT had solid proof of OCW's effectiveness, these schools were planning OCW programs of their own.

Schools outside the United States demonstrated an equally enthusiastic response to the mission. In 2004, MIT linguistics professor Shigeru Miyagawa, a member of the original faculty committee on lifelong learning, was invited to speak about OpenCourseWare with the presidents of leading Japanese universities. In the span of a few months, this series of meetings would result in the launch of the Japan OCW Consortium (http://www.jocw.jp/), a collaboration of nine top Japanese universities. In early 2005, the MIT OpenCourseWare staff was also contacted by representatives of a group of top French engineering schools, ParisTech, who were interested in launching their own OpenCourseWare initiative. This contact would ultimately bear fruit in the launch of the ParisTech "Graduate School" site (http://graduateschool.paristech.fr/?langue=EN).

III. FROM COMMUNITY TO CONSORTIUM

During 2004 and early 2005, MIT struggled to keep up with this early and unexpected interest in the OpenCourseWare model. MIT's site had received over 4 million visits in its first year, and evidence was quickly being collected demonstrating the effectiveness of the model. This attracted the attention of an even wider group of interested universities around the world, each with its own set of questions about how they might implement an OpenCourseWare site.

In March 2004, the MIT staff produced and launched a "How To" site, providing thousands of pages of documentation detailing MIT's implementation approach for OCW—a resource that would receive more than 23,000 visits before it was finally archived in March 2009. But the MIT staff quickly discovered that these new projects joining the nascent movement often had better advice to offer one another than MIT did.

The MIT program had been implemented at a scale and with a budget far beyond those of the other programs, and MIT's solutions were often a misfit. The MIT staff shifted gears from providing direct advice to facilitating communication between emerging OCW programs. A clear cluster of issues emerged as key challenges to this group of early adopters, including faculty recruitment, technology choices, intellectual property management, and sustainability. As the new programs began implementation, each began to provide leadership in these areas.

Utah State University sent a team of technologists to examine the MIT's technical infrastructure and created a scaled-down open source content management system appropriate to the needs of the emerging OCWs, a system since adopted by scores of other programs. Notre Dame and the schools of the Japan OCW Consortium introduced innovations in the management of intellectual property and licensing. Johns Hopkins developed a unique approach to image management. Tufts University distributed their OCW staff across existing units at the school, embedding the costs of site production across numerous budgets and enhancing program sustainability. The challenge for MIT became how to capture this burst of innovation and share it back with the rest of the community.

The early adopters of the OCW model were joined in 2004 by energetic organizations that began translating OCW materials produced by MIT and others. Universia.net, an IberoAmerican educational portal supported by Banco Santander, began translations of MIT courses into Spanish and Portuguese. The American-based IET Foundation, led by Dr. Fun-Den Wang, established China Open Resources for Education (CORE), an organization tasked with translating course materials from many of the early OCWs into simplified Chinese. These efforts, funded by the translating organizations themselves, were important in bringing OCW to a wider global audience.

By early 2005, it was clear that the MIT staff could not facilitate the volume of discussion generated by the sharing of publishing innovations and coordination with translation partners. A structure was required in order to support more direct exchange of ideas and information. On February 17, 2005, a meeting was held on the MIT campus that brought together representatives of China Open Resources for Education, Japan OCW Consortium, Johns Hopkins Bloomberg School of Public Health, Tufts University, Universia, University of Notre Dame, Utah State University and MIT. At this meeting, the participants agreed the time had come to form an organization to support the production and use of OpenCourseWare materials.

IV. EARLY DEVELOPMENT OF THE CONSORTIUM

At the meeting on MIT's campus in early 2005, participants agreed to hold the first meeting of the OCW Consortium in conjunction with Utah State University's OpenEd conference planned for that fall in Logan Utah. But even this decision created challenges, as the Consortium was not a legal entity and had no staff or budget. As the program with the largest staff and budget, MIT stepped forward to manage the planning of the meeting, and the Hewlett Foundation provided a small line item in MIT's grant to support the Consortium.

At that first formal gathering of the young organization, the members articulated a mission for the organization, "to advance education and empower people worldwide through

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OpenCourseWare." The group further defined a set of goals in support of that mission and decided to create a portal Web site that linked all of the member OpenCourseWare sites and shared best practices to encourage more schools to join. Finally, the members agreed to meet again April 2006 on the campus of Kyoto University.

In collaboration with Kyoto University staff, MIT staff once again supported the planning and execution of the April 2006 meeting, which saw the launch of the OCW Consortium portal (http://ocwconsortium.org). Through 2006, participation in the Consortium continued to grow, with new projects emerging in regions including the United Kingdom, China and Taiwan, Vietnam, South Africa and Venezuela. In all some 70 universities and affiliated organizations were represented by the time the Consortium gathered again in Utah during OpenEd 2006.

MIT had reached the extent of its capacity to manage the Consortium, and the decision was made to hire a full-time executive director to support the activities of the group. The Consortium was still an informal organization, however, and so MIT hired a full-time employee on their OCW staff to serve the Consortium. This staff member catalyzed tremendous growth in global participation during the period 2006 through 2008, managing three additional meetings, overseeing the incorporation of the Consortium as an independent entity, and securing a three-year $1.5 million dollar grant from the Hewlett Foundation to support the organization.

V. EMERGENCE OF AN INDEPENDENT CONSORTIUM

During the Spring of 2008, in preparation for the formal incorporation if the Consortium, the members elected the organization's first board of directors. The board met for the first time at the Consortium's April 2008 meeting in Dalian, China, and included representatives from China, Japan, Korea, Mexico, the Netherlands, Spain, South Africa, the United Kingdom, and the United States. When the formal incorporation papers were signed July 9th, 2008, the Consortium was officially an independent organization under the direction of these community representatives.

In order to ensure the direction of the organization reflected the interests of the full community, the board undertook an organizational planning process in late 2008 and early 2009, resulting in the Consortium's first formal strategic plan. This plan articulated the vision of this growing body of international universities and their affiliates:

> *We envision a world in which the desire to learn is fully met by the opportunity to do so anywhere in the world, where everyone, everywhere is able to access affordable, educationally and culturally appropriate opportunities to gain whatever knowledge or training they desire. The Consortium acts to realize this vision by addressing one issue—that of access to high-quality educational materials—and by partnering with organizations addressing related problems that must also be solved to make this vision a reality.*

The document also reexamined the previously articulated mission statement, declaring the purpose of the Consortium was "to advance formal and informal learning through the worldwide sharing and use of free, open, high-quality education materials organized as courses." The document likewise refined the goals of the organization as follows:

> 1. *Increase the number of members in the OCWC, and the number and diversity of OpenCourseWare courses they make available;*
>
> 2. *Enhance the value of OCW courses to all types of users around the world; and to*
>
> 3. *Build and nurture a vibrant, culturally diverse global OpenCourseWare community that is connected to the broader OER movement.*

The strategic plan further identified a series of strategic initiatives in support of those goals that provided direction to the small staff..

VI. SERVING PRODUCERS AND USERS OF OCW

The Consortium today supports emerging OpenCourseWare projects, builds global awareness and use of OpenCourseWare materials, and connects the vibrant OCW community to the education, government and private sectors. More than 200 universities around the world participate in Consortium activities, and collectively they have published materials from an estimated 13,000 courses in more than 20 languages. Volunteers around the world have translated an additional 3,500 courses from their original language.

This vast collection of academic materials provides opportunities to individuals around the world for personal and professional development. It also supplies an infrastructure to governments, NGOs and educational institutions for use in addressing a diverse set of challenges including workforce development, educational system improvements, and public health enhancement. All OCW materials are available through the Consortium's Web site (http://ocwconsortium.org), and the Consortium staff builds general awareness of OCW through media and outreach.

The OpenCourseWare Consortium has also clarified and diversified its categories of membership to make the organization as inclusive and sustainable as possible. Member categories now include:

- **Institutional members** – the accredited higher education institutions that make up the bulk of the membership and are the primary producers of course materials.

- **Associate consortia** – consortia of universities affiliated by region or common interest, such as the Japan OCW Consortium, which are important coordinating bodies in the community.

- **Associate institutional members** – accredited higher education institutions for which the primary connection is through an associate consortium, and which pay reduced dues and have reduced voting rights for board elections.

- **Affiliates** – organizations that are not accredited higher education institutions but nonetheless further the mission of the Consortium in one or more ways; includes standards groups like Creative Commons and NGOs like Fahamu publishing educational materials.

- **Corporate members** – corporations supporting the OpenCourseWare Consortium and providing services to other members.

In a very brief span of time, the OpenCourseWare Consortium has grown from of a common commitment to serving world educational needs through an innovative model into a global organization supporting a diverse community of OCW users and producers. The Consortium faces the significant challenge of transitioning from grant funding to sustainable sources of revenue including significant member support. To begin the transition, the Consortium introduced membership dues this year of between US$50 and $500 depending on membership category and member region. In a demonstration of commitment to the Consortium, a core group of leading universities and organizations, including most of those described throughout this paper, have each pledged US$5,000 per year in each of the next five years to the Consortium. This statement from across the community indicates the strength of the OCW movement and suggests Consortium will be supporting the production and use of OpenCourseWare materials for many years to come.