

A National Advocacy Framework for Open Educational Resources in Canada

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Executive Summary

In June 2021, acting on a need for national coordination for advocacy purposes expressed by the Open Education community, the Canadian Association of Research Libraries (CARL) began to engage diverse stakeholders, including national student groups, representatives from provincial open education (OE) organizations; scholars, and advocates in open education; and individuals and groups representing institutions of higher education to develop a strategy for open educational resources (OER) in Canada. Through these efforts, the *Open Educational Resources (OER) National Strategy - Stratégie nationale en matière de ressources éducatives libres (REL)* group was formed. The group meets regularly to discuss strategies to advance federal support for open education in Canada.

The present document, *National Advocacy Framework for Open Educational Resources in Canada*, was developed to facilitate and inform national OER advocacy led by the *National Strategy* group. We, the authors, are practitioners and experts from a variety of backgrounds in Canada's post-secondary system. Our aim is to inform the community and aid in the facilitation and coordination of national OER advocacy. Therefore, the purpose of this document, reviewed by a diverse set of OER experts, is to assist stakeholders in advocating for federal involvement in OER. Its scope is OER in the context of the higher education landscape in Canada and connections with federal programs. It does not address OER for the K-12 sector¹ or concerns related to open educational practices and pedagogy, given provincial and institutional level mandates with regard to curriculum. Furthermore, it recognizes that national stakeholders are active in a variety of areas of advocacy in relation to the federal government, and, as such, avoids discussion and analysis of some related areas of work including post-secondary affordability (beyond OER) and copyright, including educational fair dealing and Crown copyright.

As evidenced throughout this document, there are numerous potential federal initiatives and many existing policies and programs that could be expanded or reconsidered to support OER without raising concerns of provincial/territorial

¹ At present “there is little if any activity in the primary and secondary levels (K-12) in Canada in terms of OER,” compared to the US where more than 25 states support OER in K-12 schools (McGreal, 2017).

jurisdiction of constitutional overreach. OER can help Canada move towards the goal of building capacity to support the educational needs of Canadians when it comes to changing job markets and do so with affordability in mind.

The document is divided into six sections with five appendices. Following the Introduction, a Vision Statement and set of values that have informed this work are presented. The current context surrounding open education is reviewed, touching on the international context, and focusing considerably on current federal policies and programs that provide potential connections to OER – the ‘hooks’ for which different advocacy arguments could be attached. In the *Principles Underpinning Federal Involvement* section, several principles that show linkages between open education and already existing federal commitments are raised. In the *Priorities of a National Approach to Open Education* section, we raise seven core advocacy directions, all important, that lay out priorities that we have identified within the area of OER that tie in with already existing federal priorities. Finally, in the *Ways Forward* section, we discuss the three priorities identified by the group, namely Canadian Culture & Language: Francophone OER; Truth and Reconciliation: Indigenous OER; and Federal Infrastructure and Policy supporting OER. We also discuss plans to hold a series of OER summits that align with these three priorities in 2022-2024.

To make federal support of OER a reality, the *Open Educational Resources (OER) National Strategy - Stratégie nationale en matière de ressources éducatives libres (REL)* group of stakeholders plans to:

- Determine next steps in terms of advocacy messaging in these areas and if specific funding envelopes should be targeted and what levels of fiscal support are required;
- Collaborate and coordinate to present a common or unified voice of federal advocacy; and
- Identify other potential stakeholders and advocates and include them in advocacy related initiatives.

Introduction

Canada's Open Educational Resource (OER) landscape has known many successes, but manifests one notable gap. While provincial initiatives such as BCcampus and eCampusOntario are world leaders, Canadian academics are key contributors globally to the OER movement, and Canadian student groups are passionate and successful advocates, the Government of Canada has yet to play a substantive role in open education. Over the past several years, stakeholders from across Canada's post-secondary landscape have become increasingly interested in coordinating advocacy efforts to underscore the role the federal government should play. *A National Advocacy Framework for Open Educational Resources in Canada* aims to articulate a common set of principles for federal involvement, a vision, and potential advocacy strategies to help unify efforts in this regard.

This document was developed by a working group of the national advocacy group *Open Educational Resources (OER) National Strategy - Stratégie nationale en matière de ressources éducatives libres (REL)*. The *OER National Strategy - Stratégie nationale en matière de REL* group was founded in June 2021 to advance and coordinate advocacy around seeking federal involvement and funding for open education. It was with the recognition that there are many stakeholders in the successful implementation of open education advocacy at the federal level that we started with a large stakeholder group. Student groups have been central to much of the early advocacy asking for federal support for open education to date.² Therefore, this group is comprised of individuals from universities and colleges across Canada and representatives from key national higher education organizations, including:

- BCcampus
- Canadian Alliance of Student Associations - Alliance canadienne des associations étudiantes (CASA-ACAE)
- Canadian Association of Research Libraries - Association des bibliothèques de recherche du Canada (CARL-ABRC)

² For example, the Canadian Alliance of Student Associations (CASA) stated that open access publications like OER “should be promoted and utilized wherever possible because they maximize access to information, affordability, and adaptability to the diverse needs of students” (Canadian Alliance of Student Associations, 2019, p. 4).

- Canadian Association of University Teachers – Association canadienne des professeures et professeurs universitaires (CAUT-ACPPU)
- Canadian Federation of Students - Fédération canadienne des étudiantes et étudiants (CFS-FCÉÉ)
- Campus Stores Canada
- Campus Manitoba
- Colleges and Institutes Canada - Collèges et instituts Canada (CICan)
- Consortium national de développement de ressources pédagogiques en français au collégial
- Council of Atlantic Academic Libraries - Conseil des bibliothèques postsecondaires de l'Atlantique (CAAL-CBPA)
- eCampusOntario
- Open/Technology in Education Society, and Scholarship Association - Ouverture/Technologies en Éducation, dans la Société et pour l'avancement des Savoirs (OTESSA)
- Scholarly Publishing and Academic Resources Coalition (SPARC)
- Union étudiante du Québec - Quebec Student Union
- Universities Canada - Universités Canada
- Vice-Presidents Teaching & Learning Table Canada (VPTL Canada)

We believe that the time for a co-ordinated national approach of OER stakeholders has arrived. As part of the national economic post-pandemic recovery, the role of low cost and no cost learning for youth and re-skilling lifelong learners holds a catalyzing potential in our changing educational landscape. As evidenced throughout this document there are numerous potential federal initiatives, and many existing policies and programs that can be expanded or reconsidered to support OER without raising concerns of provincial/territorial jurisdiction of constitutional overreach. We can help Canada move towards the goal of building capacity to support the educational needs of Canadians when it comes to changing job markets and do so with affordability in mind.

Vision Statement

As a UNESCO member country, Canada has a responsibility to uphold the 2012 and 2019 UNESCO commitments to OER, by playing an active role in the

sustainable global production of freely available educational materials. National coordination is needed to ensure barrier-free learning for all Canadians. The Government of Canada is positioned to advance inclusive, equitable and accessible knowledge through promotion, infrastructure development and capacity-building for quality OER in French and English.

In recognition of its goal to advance the *OER National Strategy - Stratégie nationale en matière de REL* group vision statement is as follows:

- Canada has a responsibility to address inequities in access to high-quality educational resources;
- Canada must ensure citizens have access to high quality Canadian content and that such content is reproducible and can be modified for localized contexts according to community needs for language and culture;
- Knowledge produced with public funds should be openly licensed, when appropriate;
- Open educational resources enable barrier-free learning and can be an integral part of an accessible education strategy;
- Open educational resources support and create opportunities for innovation in pedagogy and learning;
- Openness in education is not merely about access to resources but must also address barriers such as cost, language, format, accessibility, and discoverability;
- Reconciliation requires the prioritization of preservation and continuation of Indigenous languages and Knowledges through culturally-responsive, local and respectful understanding of Indigenous Knowledges;
- Learners and educators should have equal access to OER regardless of where they are in Canada; and
- Sustainability for OER in terms of on-going creation funds, revisions, infrastructure and discoverability accessible to all Canadians is key to future success of OER initiatives, and United Nations Sustainable Development Goals (SDG) will be improved by a federal vision.

Overview of Current Context

International Context

Since 2002, UNESCO has recognized OER as part of ‘Open Solutions,’ alongside Free and Open Source software (FOSS), Open Access (OA), Open Data (OD) and crowdsourcing platforms (UNESCO, n.d.c; UNESCO, n.d.d). The values around Open Solutions are universal access to information and knowledge, which UNESCO sees as “key to the building of peace, sustainable social and economic development, and intercultural dialogue,” and in which Canada can play a part (UNESCO, n.d.c).³ Anchored in three of the UN Sustainable Development Goals—Quality Education, Gender Equality, and Partnerships for the Goals (UNDESA, n.d.a)—OER provide a strategic opportunity to improve the quality of learning and knowledge sharing as well as improve policy dialogue, and capacity-building globally. The *2012 Paris OER Declaration* recommended actions from UNESCO member states, such as fostering awareness and use of OER, reinforcing the development of strategies and policies on OER, fostering strategic alliances for OER, and encouraging the development and adaptation of OER in a variety of languages and cultural contexts (UNESCO, 2012).

Building on the *Ljubljana OER Action Plan* (UNESCO, 2017), which aimed to mainstream OER in an effort to help all member states to create inclusive knowledge societies and achieve the 2030 Sustainable Development Agenda,⁴ the *UNESCO Recommendation on Open Educational Resources* (UNESCO, n.d.d) was adopted in 2019. The *Recommendation* addresses five objectives: (i) Building capacity of stakeholders to create, access, re-use, adapt and redistribute OER; (ii) Developing supportive policy; (iii) Encouraging inclusive and equitable quality OER; (iv) Nurturing the creation of sustainability models for OER; and (v) Facilitating international cooperation (UNESCO, 2019). While the OER Dynamic Coalition was established to support the implementation and success of these objectives (UNESCO, n.d.b), Canada, through its longstanding

³ Rory McGreal, professor at University of Athabasca and UNESCO Chair in Open Education, notes that in terms of the Sustainable Development Goal 4: Quality Education (SDG4), “Canada can play an important role in supporting SDG4 by increasing its support for OER and open education in general, both in Canada and abroad” (McGreal, 2017).

⁴ Namely SDG 4 (Quality education), SDG 5 (Gender equality), SDG 9 (Industry, innovation and infrastructure), SDG 10 (Reduced inequalities within and across countries), SDG 16 (Peace, justice and strong institutions) and SDG 17 (Partnerships for the goals) (UNDESA, n.d.b).

commitment to UNESCO, has a series of OER commitments to meet as listed in the five objectives outlined above.⁵

The global developments led by UNESCO reflect a broader international movement toward OER. The global advocacy organization, the Scholarly Publishing and Academic Resources Coalition (SPARC), is also a leading partner in open initiatives for academic and research libraries in the United States and Canada. On December 23, 2022, the U.S. House of Representatives passed the Fiscal Year 2023 omnibus appropriations bill (SPARC, 2022b). The bill includes \$12 million in funding for the federal Open Textbook Pilot grant program bringing the program's total funding to \$47 million over six years (SPARC, 2022b). As well in 2022, the U.S. Congress reintroduced the Affordable College Textbook Act, which addressed the cost of course materials for college students across the United States (SPARC, 2022a). French-speaking organizations such as Agence universitaire de la Francophonie (AUF) have focused some of their open education efforts on international development. Spearheaded by the University of Geneva, an international initiative has established a multilingual open education journal, *Éducation ouverte et libre - Open Education*.

Other global and international organizations demonstrate significant involvement in OER and open education. For example, members of the Open Knowledge Foundation (OKFN) have figured in the global open education movement as advocates of open collaboration in knowledge creation, as have organizations like Open Education Global and the OER Foundation. Likewise, Open Education Global, formerly the Open Education Consortium, is a well-established international network of higher education institutes committed to openness in education. As well, standards developed by the Information Technology for Learning, Education and Training Committee (ISO, 1999) of the International Standards Organization (ISO) target the interoperability and usefulness of learning resources with a particular emphasis on Linked Open Data.

⁵ Currently UNESCO supports OER within education with eleven positions of Chairs in Open Educational Resources worldwide, including Dr. Rory McGreal at Athabasca University (UNESCO, 2021).

Government of Canada Policy Intersections with OER

While the UNESCO Recommendation discussed above, and specifically Recommendation 2 - developing supportive policy,⁶ compel federal involvement, there are already numerous federal policies and programs that have connections or potentially connections to OER. From existing contributions to the post-secondary sector and educational infrastructure to support for textbook publishers and its own open initiatives, there is an opportunity for the Government of Canada to contribute to Canada's OER ecosystem.

While provincial/territorial governments have primary jurisdiction over post-secondary education, the federal government plays an important role in the post-secondary education context, specifically with programs designed to address affordability, minority language education, and the overall quality and excellence of the Canadian post-secondary system. This section outlines existing intersections between Government of Canada policy and OER, demonstrating that considerations of federal-provincial jurisdiction do not impede progress in key areas.

The high cost of education is a barrier for students pursuing higher education, particularly for students from lower income families and other underrepresented groups.⁷ Student debt varies greatly by discipline and program of education, but Statistics Canada reports the average Bachelor's degree debt between 2010 and 2015 to be around \$20,000.⁸ Enabling Canadian students to access post-secondary education has been an area of federal involvement for almost 60 years with the establishment of the Canada Student Loans Program (Human Resources and Skills Development Canada, 2011). In 2018-19 the Canada Student Financial Assistance Program (CSFAP) provided \$1.6 billion in non-repayable grants to over 533,000 students and

⁶ Recommendation 2 states: "Developing supportive policy: encouraging governments, and education authorities and institutions to adopt regulatory frameworks to support open licensing of publicly funded educational and research materials, develop strategies to enable the use and adaptation of OER in support of high quality, inclusive education and lifelong learning for all, supported by relevant research in the area" (UNESCO, 2019, p. 4).

⁷ Not attending post-secondary education or training has long term impacts on life-long earnings of Canadians (Statistics Canada, 2017). Research has also found that low income groups such as refugees are likely to "misperceive the cost and benefits of higher education" and be deterred by its high costs (Ferede, 2012, p. 79).

⁸ In the US and Canada, student loan debt creates a wealth gap between those that took out loans and those that did not (Perry et al., 2021; Rogova et al., 2016).

\$3.6 billion in loans to over 625,000 students (Employment and Social Development Canada, 2020a, p. 7). As well the interest on student loans has its own area of federal policy in the Repayment Assistance Program (Government of Canada, 2022a). The CSFAP also provides a model for provincial/territorial-federal collaboration on post-secondary education, and includes a separate funding envelope (\$492.3 million in 2018-19) for the three non-participating jurisdictions (QC, NT, NU) (Employment and Social Development Canada, 2020a, p. 7). The longstanding program is justified on the basis of historical precedent and the need for equality of access to post-secondary education across the country (Human Resources and Skills Development Canada, 2011). In addition to the CSFAP, the Government of Canada also expends nearly \$1 billion in Canada Education Savings grant payments also with the aim of facilitating post-secondary access (Government of Canada, 2023a, p. II-71).

Ensuring quality post-secondary educational opportunities for official language minority communities is another key aspect of federal involvement in the post-secondary system. In 2021 alone, the Government of Canada announced \$121.3 million in funding over three years with the aims of boosting capacity, enhancing collections and maintaining access to programs of study. This follows recent investments to support minority language education at Canadian post-secondary institutions totalling \$80 million (Canadian Heritage, 2021c). Canadian Heritage also provides over \$12 million in funding for 1,000 bursaries to encourage English speaking students to take French language post-secondary programs (Government of Canada, 2018). The National Heritage Digitization Strategy has been assisting with the sharing, expression, and appreciation of Canadian identity, while ensuring that Canadian content is accessible at home and abroad in both official languages (Library and Archives Canada, 2016).

A third major area of federal involvement in the post-secondary system is enhancing research facilitated through a series of targeted investments aimed at enhancing the quality and competitiveness of Canada's universities and colleges. These initiatives include funding for Canada's three funding agencies.⁹ In turn the Tri-Agencies fund numerous programs including the Canada Research Chair program, the Canada Excellence Research Chairs, the

⁹ The three federal agencies are: the Canadian Institutes of Health Research (CIHR), the Natural Sciences and Engineering Research Council (NSERC), and the Social Sciences and Humanities Research Council (SSHRC).

Canada First Research Excellence Fund, and the Canada Graduate Scholarships program. Total planned funding for 2023-24 is nearly \$3.8 billion (Government of Canada, 2023a, pp. I-5-I-8). This significant investment by the Government of Canada is a key factor in ensuring quality post-secondary education.

Educational infrastructure is another key contribution of the federal government. In addition to Canada's three funding agencies, the Canada Foundation for Innovation is funded by Innovation, Science and Economic Development Canada (ISED) for over \$450 million in 2023-24 (Government of Canada, 2023a, p. II-89). The arm's length independent corporation provides crucial research and research infrastructure support. A comparable program for teaching and learning infrastructure is currently missing. Similarly, ISED invests \$40 million annually into CANARIE (Government of Canada, 2023a, p. II-89), the arms-length, government funded research network backbone. Funding for educational infrastructure for OER naturally extends current federal involvement in post-secondary education.

The Government of Canada's ongoing funding for post-secondary opportunity programs for Indigenous peoples within Canada¹⁰ along with outstanding commitments to reconciliation and improving relations with Indigenous peoples connect with aspects of OER. The Truth and Reconciliation Commission's *Calls to Action* report has multiple relevant calls, including calls related to advancing Indigenous education (Calls 7 and 12), language revitalization (Call 14), and settler education (57, 62, 63, 64 and 94) (Truth and Reconciliation Commission of Canada, 2015).¹¹ The Government of Canada's commitment to the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) (2007, pp. 5-6) in the *UNDRIP Act* (Government of Canada, 2021h) also connects with Indigenous educational rights and specifically Articles 13 through 15.¹² Indigenous Services Canada has several initiatives to support education, including post-secondary education. Notably, the agency's combined expenditure for post-secondary education is \$359.3 million (Government of Canada, 2023a, p. II-85).

¹⁰ Specifically the First Nations Post-Secondary Education Strategy (Government of Canada, 2023a, p. II-85), the Inuit Post-Secondary Education Strategy (Government of Canada, 2023a, p. II-85), and the Métis Nation Post-Secondary Education Strategy (Government of Canada, 2023a, p. II-85).

¹¹ For the text of the relevant Calls, and further discussion, see Appendix 2: Truth and Reconciliation: Indigenous OER.

¹² For the text of the relevant Articles, and further discussion, see UNDRIP (2007).

The federal government also plays a vital role in Canadian publishing through Canadian Heritage's Canada Book Fund (Canadian Heritage, 2021a). With a planned expenditure of close to \$40 million in 2023 (Porter, 2021), the fund provides much needed support for a range of publishers, though notably excludes university presses (Canadian Heritage, 2021a). A 2014 Canadian Heritage review of the program, which includes support for commercial textbook publishers, recommended further support for the production of digital books. OER contributes to the knowledge commons and offers a future-focused digital publishing model that the Canadian Heritage's Canada Book Fund should also support (Canadian Heritage, 2021a).

Canadian Heritage is also the lead department for official languages. While the department has an extensive array of programs (Canadian Heritage, 2021b), key elements include a recent \$131.2 million enhancement of the *Official Languages Act* programs including support for all levels of the educational sector (Canadian Heritage, 2020). More importantly, Section 43(1) of the *Official Languages Act* specifically empowers the Minister of Canadian Heritage to:

(d) encourage and assist provincial governments to support the development of English and French linguistic minority communities generally and, in particular, to offer provincial and municipal services in both English and French and to provide opportunities for members of English or French linguistic minority communities to be educated in their own language;

(e) encourage and assist provincial governments to provide opportunities for everyone in Canada to learn both English and French; (Official Languages Act, 1985).

Since launching its Open Data portal in 2011 (Open Government Team, 2019), Canada has consistently expanded its emphasis on open government. While the federal commitment extends beyond making data sets openly accessible to a range of open initiatives, as of now (the Fourth National Action Plan on Open Government), a comprehensive approach in relation to OER has yet to be developed (Government of Canada, 2020a). OER support strongly aligns with the government's own stated benefits of open data including support for innovation and research (Government of Canada, 2020b). Many OER already draw upon, refer to or include federally funded research outputs, and can act

as a complement to other knowledge mobilization strategies for Canadian funded research.

Finally, the Government of Canada already has some existing support for OER initiatives. Specifically, the Canada School of Public Services' (CSPS) GCshare program (Canada School of Public Service, n.d.c), a partnership with eCampusOntario, makes federal training materials available as open educational resources. There are currently over 50 resources made available under open licenses (Canada School of Public Service, n.d.). CSPS also maintains its own Open Learning portal (Canada School of Public Service, n.d.a) that holds a variety of publicly available materials and supports the development of core competencies for the public service. GCwiki, a public-facing wiki hosted by the federal government, makes a variety of information resources available under an open Creative Commons Attribution (CC BY 4.0) license (Government of Canada, 2021e).

Provincial and Territorial Landscape

OER support across Canada is considerably uneven and there is a lack of a consistent or unified approach across the provinces. British Columbia and Ontario have well developed provincial initiatives for supporting OER. Regional collaboration is being used to advance work in the Atlantic provinces; however, other regional collaborations, such as the *British Columbia, Alberta, and Saskatchewan 2014 Memorandum of Understanding* (Alberta Ministry of Innovation et al., 2014), have not proven sustainable. Saskatchewan, Manitoba, Quebec, and the Yukon have all developed some initiatives to support OER. The Northwest Territories, Nunavut and Alberta lack any substantive program in support of OER. The case of Alberta is particularly notable as the \$1.76M provincial initiative that began in 2014 was completed and not renewed in 2017 (Alberta OER, n.d.). A more detailed discussion of provincial and territorial work is included in *Appendix 1: Provincial, Territorial, Pan-Canadian and Institutional Approaches to OER*.

Principles Underpinning Federal Involvement

The following principles outline the policy rationale for federal involvement in OER support.

National Responsibility and International Commitments

As a founding UNESCO member, Canada has a national responsibility to uphold and advance the principles outlined in the *Recommendation on Open Educational Resources (OER)* (UNESCO, 2019). The UNESCO recommendation calls for the building of supportive policy for OER which can happen most effectively at the federal level. The federal government is perfectly positioned to facilitate international cooperation around OER.¹³ The Government of Canada has specifically stated that it is in the country's national interest to advance the work of UNESCO (Government of Canada, 2021a), and UNESCO has specifically underscored the role of OER to contribute to “peace, sustainable social and economic development and intercultural dialogue” (UNESCO, n.d.).

Pandemic and Post-Pandemic Economic Recovery

Nations around the world have identified education as a key pillar to address pandemic and post-pandemic economic recovery. COVID-19 has accelerated digital transformation and technological innovation in education (Martin-Barbero, 2020). While the federal government created the Canada Emergency Student Benefit in the short term to deal with impacts of COVID-19, a longer-term strategy could address the affordability of postsecondary educational materials (Government of Canada, 2022b). Investment in OER should be part of a robust made-in-Canada economic recovery strategy.

Provincial/Territorial and Federal Coordination

Respecting the provincial/territorial jurisdiction over education, the federal government can support regions of Canada that lack capacity to support OER development. Federal coordination can help avoid unnecessary duplication among provinces and facilitate capacity development and sharing. The Government of Canada has the unique ability to bring together provincial and territorial partners, including the Council of Ministers of Education, Canada (CMEC), to develop coordinated national strategies for OER. While acknowledging that higher education is on the most part a provincial funding

¹³ While this only touched on in the scope of this document, OER can play a role in realizing the *United Nations Sustainable Development Goals* (United Nations Department of Economic and Social Affairs [UNDESA], n.d.). Specifically, Sustainable Development Goal (SDG) 4 - “ensure inclusive and equitable quality education and promote lifelong learning opportunities for all” (UNDESA, n.d.a).

responsibility, Canada is the only G7 country without a Federal Ministry of Advanced Education and recent Canadian Federation of Students' advocacy documents call for a national vision for post-secondary education (Canadian Federation of Students, 2022).¹⁴

Infrastructure Support

Inter-provincial/territorial infrastructure and a unified approach to infrastructure sharing is invaluable to instructors, students, and citizens. A fully bilingual, national digital open infrastructure that supports OER creation, access, discoverability and standardized metadata can only be taken on at the federal level. The lack of such infrastructure disadvantages Canadians as there are several foreign examples, including from G7 members, of national digital infrastructure projects that support OER.¹⁵ OER infrastructure is currently piecemeal across provinces; a national infrastructure would facilitate greater discoverability of resources, identify gaps in OER coverage, enable more reuse and customizations, and, by virtue of national coordination, advance innovation.

Diversity, Equity, Inclusion and Reconciliation

Diversity, equity, inclusion, and reconciliation are integral responsibilities of the federal government and across Canadian society more broadly, and OER can foster educational efforts in these areas (Clement, 2020). Federal support for OER can ensure broader inclusion of underrepresented voices in education, including but not limited to French-language contributions and Indigenous peoples and Knowledges (Brunet, 2021). OER also advances accessibility in education, both within the post-secondary system and beyond as such materials have the potential to be used by a wide variety of Canadian learners.

Affordability and Cost Effectiveness

Lack of equitable access to resources creates a divide in the classroom between have and have-not students and creates a barrier to accessing higher education. Research has shown that textbook affordability or student textbook

¹⁴ In their 2022 lobbying document, the Canadian Federation of Students call for a national vision for post-secondary education that centers on affordable education as part of a pandemic recovery (Canadian Federation of Students, 2022).

¹⁵ Spain, China, Japan, and South Korea have national repositories that include OER (Zawacki-Richter et al., 2019).

purchasing patterns can affect student success.¹⁶ Canadian students and their families benefit from OER and improved post-secondary affordability, particularly at a time of rising inflation, and affordability is a central concern for students (Statistics Canada, 2020a). Rising textbook purchase prices themselves have contributed to the problem.¹⁷ Currently Canadian undergraduate students are told they need to budget between \$800 and \$1000 per year for textbooks (Financial Consumer Agency of Canada, 2022).

There are real pedagogical impacts to the high cost of commercial textbooks and ancillary materials.¹⁸ Many student organizations at campuses across Canada have either conducted surveys in which textbook affordability is raised

¹⁶ There have been several studies that have been conducted in Canada about textbook costs. A 2015 survey about textbook use was notable as it captured the impact of textbook costs, tied with demographic information that found that students with student loans, visible minority students and students who had part-time jobs had course outcomes that were more affected by textbook costs (Jhangiani & Jhangiani, 2017). The University of Guelph Student Textbook Survey, with over 4,000 students responded, reported that 86% of students found that there were downsides to not purchasing textbooks (University of Guelph, 2017). Notable efforts to track textbook costs include the BC Textbook Cost Data study in 2016-2017 (BC Textbook Cost Data, 2017). In the US there have been numerous empirical research studies that have demonstrated how OER can improve learning outcomes (de los Arcos et al., 2015; Hilton, 2016; Weller et al., 2017).

¹⁷ A study conducted by the Council of Alberta University Students found that textbook prices increased by 2.8 times the rate of inflation between 1995 and 2014 (Jhangiani et al., 2016). Canadian publisher commissioned research noted that students perceive textbooks' value and pricing as "unfair," "overpriced," "ridiculous," and "expensive" and that students felt that subsequent trivial additions to new editions of books resulted in unjustified pricing (EKOS Research Associates, 2015).

¹⁸ For example, 54% of students reported not buying a textbook at least once due to cost (Canadian Alliance of Student Associations, 2019, p. 5). The Guelph Textbook Survey reported that 57% of students reported that they had not purchased a required textbook, with some students noting that they chose the purchasing of food over textbooks (University of Guelph, 2017). In another Canadian survey 54% of students reported that they did not purchase a required textbook at least once, and in the same survey 30% of students indicated that textbooks costs had affected their course outcomes and these students were more likely to have part-time jobs, have student loans, or be a member of a visible minority (Jhangiani & Jhangiani, 2017). In 2020, a survey to look at COVID-19 impacts on students found that 35% of students disagreed with the statement that they always purchased required textbooks, and 19% were neutral (Yee et al., 2020a). Further, students reported that at least once they have bought required textbooks and not used them in their course (Yee, 2020b). In the US a survey by the U.S. PIRG Education Fund in 2020 found that 65% of students reported not purchasing textbooks during the COVID-19 pandemic (U.S. PIRG Education Fund, 2021). An alarming 43% of students reported that they had not registered for classes or had withdrawn from courses because of textbook costs (Canadian Alliance of Student Associations, 2021).

or conducted regional or institutional campaigns around the issue.¹⁹ Improving digital access and affordability of educational materials for students through the creation of OER will make access to higher education more affordable to all Canadians including Indigenous students, rural and Northern students, and first and second-generation Canadians.

UN Sustainable Development Goals (SDGs) and Open Education

In September 2015, together with 192 UN member states, Canada adopted the *2030 Agenda for Sustainable Development* (Government of Canada, 2023c). In this agenda there are 17 SDGs which apply to every country in the world and are considered to be universal and interlinked (UNESCO, 2016). Sustainable Development Goal 4 (SDG4) applies specifically to educational equality: “Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all” (United Nations, 2022 p. 34). Canada tracks its internal success in this area by recognizing certain measurements, primarily high school completion rates, and postsecondary education attainment rates (Government of Canada, 2021g). Internationally, Canada has committed to support education for women and girls in crisis and conflict situations and provide quality education to children in low-income countries (Government of Canada, 2021g). However, open education also has much promise in helping Canada support SDG4. As Rory McGreal notes, “Canada can play an important role in supporting SDG4 by increasing its support for OER and open education in general, both in Canada and abroad” (McGreal, 2017). Sustainable Development Goal 17 (SDG17) can also align with open education support as this goal addresses the need for the development of federal, provincial, and regional policies to support all SDGs including SDG4 (Government of Canada, 2023b). As well the UN has acknowledged that all SDGs embed principles of equity such as the equality of Indigenous Knowledges²⁰ and disability issues (United Nations Department of Economic and Social Affairs, n.d.d).

¹⁹ Some examples of student-led surveys or #textbookbroke campaigns on Canadian campuses include University of Guelph (2017), University of Alberta Students’ Union (2021), University of New Brunswick (Morehouse, 2016), University of Victoria (University of Victoria Students’ Society, n.d.), University of Waterloo (Hoque, 2018), and Queen’s University (Staf, 2018).

²⁰ The United Nations stresses that Indigenous Knowledges underpin all 17 SDGs (United Nations Department of Economic and Social Affairs, n.d.c.)

Priorities of a National Approach to Open Education

Here we outline six priorities that are seen as key to supporting OER implementation at the national level. While it is difficult to move forward advocacy positions on all six of these priorities concurrently, we believe nonetheless that it is important to outline some core pillars that underline OER work and in turn connect them to federal priorities. Twenty-seven advocacy statements that align with these priorities are outlined in *Appendix 5: National Advocacy Approaches*.

Canadian Culture & Language: Francophone OER

While open education resource development has proliferated across the globe, the unique history, culture, and language of all countries have not been reflected in OER content developed. While some materials can be considered universal (e.g., mathematics), many programs which include aspects of the Canadian experience and expertise are not reflected in the existing corpus of OER content. The *Multiculturalism Policy of Canada (Canadian Multiculturalism Act, 1985)* identifies the government's role in promoting the cultural heritage of Canadian society, including language preservation and enhancement, through social, cultural, economic, and political institutions. Through funding programs for the creation of Canadian content, like those for media and publishing, the federal government promotes and strengthens knowledge about Canada for Canadians and the world (Government of Canada, 2021f).

Funding for Canadian research, like the Imagining Canada's Future initiative offered by the Social Sciences and Humanities Research Council, is a vital part of understanding Canadian society and thinking deeply about issues important to Canada (Social Sciences and Humanities Research Council [SSHRC], 2021). A part of the SSHRC mandate is the dissemination and mobilization of knowledge to ensure use of the research outputs of funded projects (SSHRC, 2019).

Additionally, many resources developed in Canada, including those within provincially funded OER creation programs outside of Ontario and Québec do not have French language adaptations, limiting the use of current Canadian created OER across the nation. It is important to highlight that the *Official Languages Act* (1985) underlines the mandate of the Minister of Canadian

Heritage to ensure official language minority communities can be educated in their own language.²¹

Canada's bilingual status puts it in a unique position to support the creation of OER in French and in English. In Quebec, there are over 100 post-secondary institutions offering programs in French (Bureau de Coopération Interuniversitaire, n.d.; ACCQ et al., n.d.). Elsewhere in Canada, l'Association des collèges et universités de la francophonie canadienne (ACUFC) represents the collective interests of 22 post-secondary institutions in minority settings offering programs in French. ACUFC's strategic plan suggests it has a role to play in Canada's economic growth and the well-being of francophone communities through the training of a qualified bilingual workforce; in contributing to the vitality of francophone minority communities, an area of both federal and provincial jurisdiction; in helping make Canada a leader in innovation through research in French and on the Francophonie in colleges and universities and in francophone minority communities; and finally, in increasing the supply of and access to post-secondary education in French to establish a true continuum of French-language education, which is essential to the vitality and sustainability of the Canadian Francophonie (ACUFC, 2020).

Research on open education and OER has shown that translation of OER can be a first step in addressing cultural and linguistic distinctions, but that adapting or creating new content that focuses on local contexts is preferred (Bali, 2020; Cobo, 2013; Hodgkinson-Williams & Trotter, 2018; Karakaya & Karakaya, 2020). Canada should therefore put efforts toward producing content in both official languages and content that is culturally relevant for minority and distinct groups, such as Acadians, Indigenous peoples, francophones in minority settings, etc.

OER offers the opportunity to develop customizable content that can reflect the unique Canadian culture, language, and research from a national, provincial, and even local community context.

Accessibility

While equitable access and benefit of the law without discrimination is enshrined in federal legislation, inequities and barriers in education remain a common issue. The national *Canadian Survey on Disability* (CSD) (Statistics

²¹ See "Government of Canada Policy Intersections with OER" below.

Canada, 2022) identified barriers due to health-related problems and conditions of Canadians 15 years of age and above. Of the barriers related to education, the 2017 survey indicated technology²² as among the top five least commonly provided educational supports (Berrigan *et al.*, 2020).

The *Convention on the Rights of Persons with Disabilities* (CRPD) (United Nations, 2006), an international human rights treaty of the United Nations intended to protect the rights and dignity of persons with disabilities, was ratified by the Parliament of Canada and each province in 2010. Article 24 of the CRPD introduced practices to ensure reasonable accommodations that support an inclusive educational system. Of note is the recommendation of the development of alternative scripts and formats of learning objects to facilitate learning and the development of educational techniques that support persons with disabilities (Inclusive Education Canada, 2020).

Most recently, the *Accessible Canada Act* (Bill C-81) became law in 2019 (Accessible Canada Act, 2019). Its aim is to eliminate barriers and to ensure greater opportunities for people with disabilities in Canada. While the *Act* sets out to create a culture change around access for people with disabilities in areas under federal jurisdiction, it also addresses barriers in digital content and the technologies used to access it (Employment and Social Development Canada, 2020b). Though the federal law exists, legislation has not been adopted across all provinces.²³ Additionally, adoption of these policies does not address a clear way forward in how the laws can be enforced in practice, especially within individual learning environments (e.g., university courses).

The federal government's recognition of the additional financial barriers faced by students with accessibility needs is exemplified by the recent expansion of disability support grant.²⁴ OER offers the opportunity to provide flexible, customizable, openly licensed resources to address the needs of all students

²² Technology in the CDS refers to Cell/smart phone with specialized features; Computer/table with special software/adaptations; Recording equipment or note taking devices; Device for playing audiobooks; Textbooks in e-format; Magnifiers; Closed-circuit devices; Large print reading materials; Braille reading materials or manual braille (Choi, 2021).

²³ Only Manitoba (The Accessibility for Manitobans Act, 2013), Nova Scotia (Accessibility Act, 2017), Ontario (Accessibility for Ontarians with Disabilities Act, 2005), Quebec (An Act to Secure Handicapped Persons in the Exercise of Their Rights With a View to Achieving Social, School and Workplace Integration, 2004), and BC (Accessible British Columbia Act, 2022) currently have accessibility legislation.

²⁴ Federal grant programs for students with disabilities include the [Canada Student Grant for Students with Permanent Disabilities](#) and the [Supports for Student Learning Program](#).

(European Commission Science Hub, n.d.).²⁵ OER creation has a greater potential to incorporate Universal Design for Learning (UDL) principles, thus designing resources that benefit people of various learning backgrounds and abilities. With open licenses, OER provides access to editable files for the development of multiple formats which can be difficult to obtain from proprietary materials. While OER benefits all students by reducing educational cost barriers, they can especially benefit students with disabilities who often face greater financial difficulties. Finally, OER offers the opportunity for collaborative creation across institutions, countries, and the world to ensure the OER developed incorporates the expertise and experiences of people both creating and using the resources (Thomas, 2018).

Truth and Reconciliation: Indigenous OER

Indigenous Knowledges have been, and continue to be shared intergenerationally for both traditional and specific cultural uses. At their core, Indigenous Knowledges are tied to Indigenous Ways of Knowing, understanding, and to specific Indigenous laws and protocols. Indigenous Knowledges do not fit within a Western understanding of knowledge-sharing as they are owned by communities or kin relations and protocols for sharing them, including limits on sharing, are specific to each community.

In the context of Indigenous Knowledges, OER can support the sharing of Indigenous Knowledges, language revitalization, and cultural resurgence when they are developed in a culturally responsive manner. They can also support the advancement of curriculum resources for Indigenous learners of all ages. In a political context, the creation of Indigenous OER supports some crucial national and international declarations and commissions and advances reconciliation within Canada. Additionally, the integration of Indigenous Knowledges into OER can provide opportunities for cross-cultural learning and the acceptance of Indigenous-driven models of sharing information.

The relationship between Indigenous Knowledges and Canadian copyright law is complex: copyright law conflicts with views of Indigenous ownership, where Indigenous communities are not able to remain the rightful owners of their Knowledges and cultural practices. This has allowed for Indigenous Knowledges to not only be co-opted but has also allowed for the legalized

²⁵ This definition of open education as inclusive of all students because of its flexible format is part of the European Commission's definition of open education.

theft of these Knowledges. Although there are benefits to OER for both Indigenous and settler communities, there are also special considerations that need to be taken to ensure that Indigenous protocols are being followed. Best practices need to be established to ensure that Indigenous Knowledges are not co-opted, are disseminated in a way that reflects community understandings of those Knowledges, and ensures that certain Indigenous Knowledges remain owned and protected by the communities from which they originate (McCracken & Hogan, 2020).

Truth and Reconciliation Calls to Action

In 2015, the 94 Calls to Action were released by the Truth and Reconciliation Commission of Canada (Government of Canada, 2021d) to redress the legacy of Indian residential schools in Canada and advance the process of reconciliation. The Calls to Action call upon governments, educational and religious institutions, civil society groups, and all Canadians. To respond to the Truth and Reconciliation Calls to Action, OER and OER initiatives can help to support reconciliation in two different ways: Support for Indigenous Education and Language Revitalization.

We have identified Calls to Action 7 and 12 (*Appendix 2 - OER Relevant Calls to Action from the Truth and Reconciliation Commission of Canada*) as areas wherein OER can help advance Indigenous education and curricula.

Indigenous Languages

Co-developed between First Nations, Métis, and Inuit stakeholders and the Federal Government, Bill C-91, *The Indigenous Languages Act* (2019) is a response to the need for recognition and revitalization of Indigenous languages in Canada. The overall purpose of the *Act* is to support the efforts of Indigenous peoples to reclaim, revitalize, maintain, and strengthen Indigenous languages. Recognition and implementation of rights related to Indigenous languages are at the core of reconciliation with Indigenous peoples, particularly in light of the Truth and Reconciliation Commission of Canada's Calls to Action. It is clearly stated in section 23(e) that it is the duty of the Federal Government to “support innovative projects and the use of new technologies in Indigenous language education and revitalization, in cooperation with Indigenous governments and other Indigenous governing bodies, Indigenous organizations, the Government of Canada and provincial and territorial governments” (Indigenous Languages Act, 2019).

We have identified Calls to Action 14, 14.i and 14.iv (*Appendix 2 - OER Relevant Calls to Action from the Truth and Reconciliation Commission of Canada*) as areas wherein OER can support Indigenous Language revitalization efforts.

Settler Education

In addition to providing support for curriculum development in Indigenous communities, OER can provide a path toward widely accessible curated and collaborative materials directed at settler Canadians, including newcomers to Canada. These OER can ensure that Indigenous histories, lived experiences, and narratives of colonialism can be shared without Western bias and that Indigenous perspectives on historical and contemporary issues and events can be easily accessed.

Calls to Action 57, 62.i, 62.iii, 63, 63.i to 64.iv, 64 and 93 (*Appendix 2 - OER Relevant Calls to Action from the Truth and Reconciliation Commission of Canada*) have been identified as areas wherein OER can support the need to advance settler education on Indigenous issues, lived experiences, and events.

UNDRIP

With the enactment of Bill C-15 in 2021 the Federal Government now has an obligation to take all measures necessary to ensure that the laws of Canada are consistent with the United Nations *Declaration on the Rights of Indigenous Peoples* (2007) and to prepare and implement an action plan to achieve the objectives of the Declaration. Articles 13, 14, and 15 have particular relevance to OER development (See *Appendix 3 - OER Relevant United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) Articles*).

Open Licensing of Federally Produced and Funded Educational Materials

Given existing federal commitments to open government (Government of Canada, 2019a, 2020c, 2021b) and emerging federal work in open licensing initiatives, expanding the Federal Government's uptake in openly licensing federally produced and funded educational materials is a logical step. The Government of Canada produces and funds an extensive range of educational materials through a variety of federal departments and programs.²⁶ The

²⁶ Educational materials published by the Government and Canada cover a wide range of audiences from more general/public resources to more specialized materials. Examples of

resulting materials may be covered by Crown copyright,²⁷ the Open Government Licence (Government of Canada, 2019b), have rights vested or transferred to a third party, and in at least two cases be published under a Creative Commons license.²⁸

Educational outputs beyond scholarly publications may arise from research funded by the Tri-Agencies.²⁹ Faculty research funded by the three funding agencies often informs teaching practices and is included in higher education curriculum. Federal funding programs may result in grant recipients producing educational materials.³⁰ The Government also produces extensive internal training materials, some of which are made available as OER in partnership with eCampusOntario (Canada School of Public Service, n.d.b).

Such an approach does not require additional expenditure—new works can be released with an open license and open licensing of educational resources can be a condition of grants that fund them. The existing *Tri-Agency Open Access Policy on Publications* can be broadened to include a wide range of academic outputs (Government of Canada, 2016).

educational resources directly published by the Government of Canada include Health Canada's *Canada's Food Guide* (2022), the Canadian Intellectual Property Offices' *A Guide to Copyright* (2019), and Statistics Canada's *Technical Guide for Architectural Engineering and Related Services Price Index* (2020b).

²⁷ The issue of open licensing for government materials relates closely to broader discussions and advocacy around crown copyright reform. For further discussion of the issue, see Wakaruk (2021).

²⁸ The two cases are the *Canada Communicable Disease Report (CCDR)* (2019) and the Canada School of Public Service's *GCSHare* (n.d.b.).

²⁹ While the Tri-Agency does have an *Open Access Policy*, this policy is limited to peer-reviewed journal articles (s. 3.1) and, for CIHR recipients, data (s. 3.2) (Government of Canada, 2016).

³⁰ Examples of federal granting programs that may result in educational outputs include Employment and Social Development Canada's "Skills for Success Program - Training and Tools Stream" (Employment and Social Development Canada, 2022); Indigenous Services Canada's Education Partnerships Program (Government of Canada, 2021c); and Innovation, Science and Economic Development Canada's programs, such as the Digital Literacy Exchange Program (Innovation, Science and Economic Development Canada [ISED], 2019c), Canada's Connectivity Strategy (ISED, 2019a), Canada's Digital Charter (ISED, 2021a), the Post-Secondary Institutions Strategic Investment Fund (ISED, 2019b), the Intellectual Property Legal Clinics Program (ISED, 2020), and the Digital Research Infrastructure Strategy (ISED, 2021b).

Federal Funding for Pan-Canadian OER Enablement and Capacity Development

The Government of Canada can play an important role in catalyzing uptake of OER both inside and beyond the post-secondary sector. Freely available teaching and learning materials are open and available to all and the potential audience for OER is broad and includes life-long learners of any age. OER may be of use to non-profit organizations, governments, community groups, and even businesses.

Enabling OER use aligns with many federal initiatives and priorities including commitments to Open Government and *Canada's Digital Charter*. Specifically, the *Digital Charter* aligns with the principles of Universal Access (“opportunity to participate in the digital world and the necessary tools to do so”) and Data and Digital for Good (“promote openness and improve the lives of people”) (ISED, 2021a). The Federal Government is already committed to digital inclusion and literacy.³¹ The government has also played a multi-decade role in supporting infrastructure that enables post-secondary research through the Canada Foundation for Innovation (2022), CANARIE (2022), and Mitacs (2022); Library and Archives Canada (2004) also has a mandate to promote knowledge diffusion. Building capacity and encouraging OER use complements existing and long-standing government priorities. As Canada strives for universal connectivity (ISED, 2019b), Canadian-made, freely available OER make such priorities more meaningful.

Of particular importance is the need for the Government of Canada to enable greater inter-provincial coordination and collaboration. The Federal Government is uniquely positioned to provide necessary technological platforms (e.g., a national repository) and forums (e.g., coordination of annual meetings of stakeholders) to ensure that provincial investments in OER have maximum benefit.

Federal Infrastructure and Policy

Canada is already seen as a world leader in OER, but infrastructure for hosting OER is currently decentralized across provinces and territories (Miao et al., 2016; Zawacki-Richter et al., 2019). Regional infrastructure projects to date

³¹ See for example, Digital Literacy Exchange Program (ISED, 2019a) and the Government of Canada *Digital Standards: Playbook* (Treasury Board of Canada Secretariat, 2021).

have helped position Canada as a leader, but it can be argued that greater advancement in the adoption of OER occurs when there are national digital strategies and funding initiatives of support targeted towards OER.³² Funding national infrastructure is not unprecedented. For example, the Government of Canada is funding digital infrastructure support for higher education researchers in Research Data Management (RDM) through CANARIE (2022) and the Digital Research Alliance of Canada.³³

In terms of policy, the Government of Canada should uphold and advance the principles outlined in the UNESCO *Recommendation on OER* (UNESCO, 2019), which calls for the building of supportive policy for OER. Coordination with CMEC is vital due to the decentralized nature of education in Canada, to build on an existing CMEC declaration and other cross-provincial statements in support of OER.³⁴ Policy also helps support sustainability in terms of OER and creates a framework to fund infrastructure that is often supported by non-profit organizations.³⁵

³² While it is felt that the advancement of OER infrastructure has the greatest promise at the national level, in many countries OER advancement is happening at the regional or local level: “For all countries, change happens mostly in the form of national funding initiatives and national digital strategies; despite this, change was reported to happen mostly at the meso or micro level in the majority of countries” (Marín, Zawacki-Richter, & Bedenlier, 2020, as cited in Marín, Bond, et al., 2020, p. 88). Policy however is seen as a major driving force in the adoption of OER: “Appropriate policy development at national, institutional and project level has been identified as a major driving force for the successful adoption of OER” (Miao et al. 2016, p. viii).

³³ RDM infrastructure services such as the Federated Research Data Repository (FRDR) are part of the infrastructure services of the Digital Research Alliance of Canada and tie into the larger strategy of the Innovation, Science and Economic Development Canada’s digital research infrastructure that includes CANARIE (ISED, 2021b). See also *New Digital Research Infrastructure Organization* [NDRIO], 2021).

³⁴ In 2013, the Council of Ministers of Education of Canada (CMEC) unanimously endorsed the 2012 *Paris Declaration on OER* (McGreal et al., 2016, p. 66). The tri-province *Memorandum of Understanding on Open Educational Resources* (Alberta Ministry of Innovation and Advanced Education, British Columbia Ministry of Advanced Education, & Saskatchewan Ministry of Advanced Education, 2014) between the three western provinces of Alberta, British Columbia and Saskatchewan was also agreed to in 2012 (McGreal et al., 2016, p. 69). Moreover, policy models in the area of open access in Canada, including the *Tri-Agency Open Access Policy on Publications* and the *Tri-Agency Research Data Management Policy*, already show evidence of federal support for open access and open licensing initiatives.

³⁵ A Canadian example of a non-profit organization that has provided the development of infrastructure that supports OER is the open source platform Pressbooks, which is one of the leading platforms being used to support OER textbook hosting in Canada and the United States at the provincial, state, consortial and institutional level (Pressbooks, 2021). The importance of OER stewardship and sustainability being connected to support for

Ways Forward

Following the initial draft of this document, in April 2022 the *OER National Strategy - Stratégie nationale en matière de REL* group identified three top priorities as the focus of our initial advocacy efforts namely, Canadian Culture & Language: Francophone OER; Truth and Reconciliation: Indigenous OER; and Federal Infrastructure and Policy. We concluded that these priorities best align with current Federal funding models. More about federal funding capacity can be found in *Appendix 4 - Justifying New Federal Expenditures*.

A first step to identifying key advocacy directions was to plan a series of three OER Summits to address these priorities. At the first summit, the National OER Policy and Infrastructure Summit, held in November 2022 at York University, more than 30 participants from across the country came together to discuss issues related to policy and infrastructure. The objectives of the Summit were to:

1. Confirm action areas and clear advocacy objectives;
2. Address the potential and current challenges in advocating for funding in OER at the provincial and federal level; and
3. Identify opportunities for stakeholder advocacy.

Eight advocacy directions were identified and will be developed in future short position papers.

A second summit related to Canadian Culture & Language, with a focus on Francophone OER, took place on April 27, 2023 at the University of Ottawa. A third summit for Truth and Reconciliation: Indigenous OER, to be held at the University of British Columbia, will follow. Documents and recording from the three summits will be shared on the OER National Strategy webpage on the Canadian Association of Research Libraries' website as they become available.

We intend that these summits will result in a work plan and knowledge mobilization strategy, advocacy messages, and the prioritization of federal

stakeholders providing “free” OER infrastructure underpins *The CARE Framework* and is meant “to be applied by all individuals, organizations, and institutions who share a stake in the field’s long-term success and sustainability” (Petrides et al., 2018).

advocacy targets that can be widely shared. We hope that these advocacy statements can be used by or inform the work organizations advocating for national funding for open educational resources across Canada and the world.

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Appendix 1: Provincial, Territorial, Pan-Canadian and Institutional Approaches to OER

Provincial and Territorial Landscape

British Columbia

BCcampus, an organization funded by the Ministry of Post-Secondary Education and Future Skills, is tasked with developing collaborations with BC post-secondary institutions to advance educational pedagogy and practice (BCcampus, n.d.a). In 2012, BCcampus received \$1 million funding from the Ministry for the B.C. Open Textbook Project with the goal of making higher education more financially accessible to students through the development of open copyright licensed textbooks. The project initially was tasked with the creation of a collection of open textbooks for the top 40 highest-enrolled subject areas in the province, and in 2014 an additional \$1 million in funding went to the development of 20 textbooks for trades, technology, and skills training (BCcampus, n.d.d).

Since its inception, BCcampus Open Education texts have been adopted into 43 BC institutions and has saved students \$28,264,730 (BCcampus, n.d.b). In April of 2019, Melanie Mark, Minister of Advanced Education, Skills and Training, announced the funding of \$3.26 million toward open education in BC, expanding the BCcampus Open Education activities including the creation and/or adoption of an open homework system (Caldwell, 2019). In addition to stimulating development in STEM, business, health, early childhood education, and job training, as well as continued infrastructure development to increase the discoverability of OER, BCcampus Open Education also provides grants and funding to BC institutions to support Zero Textbook Cost (ZTC) programs (BCcampus, n.d.g) and Supplementary materials (BCcampus, n.d.e) development.

The next phase for open education resource development was the creation of an open collection for BC. Launched in 2022, the Open Collection is a curated selection of course materials developed by educators in B.C. that can be accessed by educators in B.C. and beyond for use in the classroom, in an institutional learning management system, or in other teaching and learning platforms. All the materials are openly licensed, which means they are free to use, customize, and share.

In summer 2020, BCcampus began creating a collection of open courses to assist instructors and course developers in creating and updating their courses. The collection currently contains several full courses that are openly licensed and ready for use, with more courses being added in 2022.

Alberta

In 2014 the provincial initiative Alberta OER provided \$1.76M for the creation, adoption and awareness of OER (Alberta OER, n.d.). Since the completion of the Alberta OER program in 2017, Alberta has relied on institution led initiatives. One example is Open Education Alberta (n.d.), a collaborative publishing program for OER materials using Pressbooks. Currently 13 institutions across Alberta participate in this program, and 45 open books have been published since March 2020.

On a provincial scale, there has been no renewed funding from the provincial government, though the recent Alberta 2030 report (Government of Alberta, 2021, p. 2) mentioned support for OER without any substantive details on what such support should entail.

Saskatchewan

In January of 2015, a large course in the College of Agriculture at the University of Saskatchewan adopted the OpenStax Economics text, the first adoption for a large course at the institution. Later that same year, the Saskatchewan Government announced annual funding (budget permitting) of \$250,000 to be split evenly between the University of Saskatchewan, University of Regina, and Saskatchewan Polytechnic (Ross, Lucky, & Francis, 2019.) As of 2021, the Government of Saskatchewan had “invested \$1.75 million to support the development of open education resources, resulting in nearly \$8 million in textbook and resource cost-savings” (Government of Saskatchewan, 2021).

The initial requirement of the funding was that each institution create new or significantly revise existing a certain number of OER. Once each institution met that requirement, the funding could be used for supporting adoptions of OER, promoting and training related to OER, and the integration of a broader range of open educational practices.

Open initiatives at each institution are run independently of initiatives at the others, with each institution deciding on their own model of funding projects, OEP priorities, platforms for creating and sharing OER, professional development, and approaches to promoting open educational practices.

The integration of open pedagogy has begun to take root at the University of Saskatchewan and University of Regina, with students creating and / or modifying OER and engaging in authentic assessment practices around it. At the University of Saskatchewan, this type of authentic assessment is seen as key to addressing the institution's Learning Charter (University of Saskatchewan, n.d.). The University of Regina has released two such projects to the wider OER community - one in History and the other in Justice Studies.

The OER Program at the University of Regina is working with faculty at First Nations University to increase the number of OER culturally relevant to its students. There are currently two such projects under development with more planned for development.

Manitoba

The Manitoba Open Education Initiative (OpenED Manitoba), hosted by Campus Manitoba in 2015, is the central organization supporting OE for the province of Manitoba. Through grassroots initiatives, and in collaboration with BCcampus, the OpenED initiative has impacted 19,329 students and saved a potential of more than \$3,409,510 in student textbook fees (OpenED Manitoba, n.d.).

Their services include supporting OER for courses, supporting OER adaptations through their PressbooksEDU network, advocating for OER and providing workshops. In addition to honoraria of \$250 for faculty to review existing OE materials, grant funding is available for OER adaptation and creation through the Campus Manitoba Pressbooks network. (Campus Manitoba, n.d.).

Ontario

eCampusOntario has been the leader on open education and OER in the province since the early 2010. The Open Library, established in 2019, now hosts more than 1,470, of which 130 are in French. This has impacted more than 192

260 students in the province and saved a potential of more than \$18,818,734 million in student textbook fees (eCampusOntario, n.d.b).

In 2021, eCampusOntario distributed \$50 million through their Virtual Learning Strategy (VLS) initiative. This investment from the Ontario Ministry of Colleges and Universities (MCU) strives to develop digital content including courses, programs, resources, and micro-credentials, enhance digital fluency by creating supports & resources for educators and learners, and build digital capacity through wraparound services and marketing (eCampusOntario, 2021). All the material from the 395 projects developed by participating institutions is made available through eCampusOntario VLS Collection (eCampusOntario, n.d.d) and has a Creative Commons license or Ontario Commons License (1.0, or ND) for reusability by other educators. The VLS initiative was continued in 2022 with an announcement of funding for \$7 million from MCU (eCampusOntario, n.d.e).

eCampusOntario also makes available to postsecondary institutions digital tools to create and share OER, such as Pressbooks and H5P Studio.

Québec

Quebec's current approach to OER largely stems from the province's Digital Action Plan (DAP) which launched in 2018 (Ministère de l'Enseignement supérieur du Québec, n.d.).³⁶ The DAP laid the groundwork for an array of projects including La fabriqueREL (n.d.), Pavillon REN (2021), École ouverte (2022),³⁷ and Réseau des leaders REL (2021).

Prior projects focused on digital learning resources, particularly through resource banks and catalogues such as Eurêka (Thibault, 2005)³⁸ and Ceres (Centre for Research LICEF Télé-université et al., n.d.). Though these catalogues indexed closed resources as well as OER, they were designed to contribute to an approach to learning which extended Quebec's 50-year history of Open Pedagogy (Admin, 2016).

³⁶ In French, "Plan d'action numérique en éducation et en enseignement supérieur."

³⁷ Pavillon REN is intended for students and staff throughout the higher education network; École Ouverte is intended for students, their parents, and academic staff at primary and secondary institutions.

³⁸ This open source software is a variation of the Comète (TÉLUQ, n.d.). tool developed with international funding under the BRER project.

A key aspect of Quebec’s approach is in working across educational levels: postsecondary institutions may contribute and benefit from work done in primary and secondary schools. Further, special attention is paid to a variety of stakeholders, including students’ parents who maintain a stake in the learning process through postsecondary education.

One of the most significant issues facing the OER movement in Québec is the lack of resources available in French. For example, of the entire Pressbooks Directory (5,247 publications as of May 2023), only 136 publications are available in French (Pressbooks, 2023).

Atlantic Provinces

The Atlantic Provinces of Newfoundland and Labrador, Nova Scotia, Prince Edward Island, and New Brunswick are supported by AtlanticOER (Council of Atlantic University Libraries, n.d.b), a service that supports the hosting and creation of OER by educators and students in these provinces.

Funded by the Council of Atlantic Academic Libraries (CAAL-CBUA), AtlanticOER began as an Open Textbooks Survey working group in 2017-18, and was officially launched on February 9th, 2021 (Council of Atlantic University Libraries, n.d.a). Of note is that this CAAL-CBUA funding is finite, and with no sustainable funding stream as yet identified, the long-term viability of AtlanticOER is unclear.

CAAL-CBUA collaborates with faculty at member institutions, as well as student government leaders and associations³⁹ throughout the region. A significant area of focus is developing education and awareness around OER across the Atlantic provinces, and to encourage OER adoption. While projects are welcomed in both official languages, upon searching Atlantic Canada’s

³⁹ The Canadian Alliance of Student Associations (CASA) calls for “the creation of a pilot program within the Canada Research Granting Agencies, at an estimated cost of \$10 million annually, that provides grant funding to graduate students and post-secondary faculty to develop innovative and affordable OER that would be available in both official languages” in their 2022 Pre-Budget Submission (Canadian Alliance of Student Associations, 2021).

collection of open textbooks and guides on Pressbooks, no publications are currently available in French.⁴⁰

In addition to AtlanticOER, both PEI and Nova Scotia have supported OER through provincial or institution-specific initiatives. The University of Prince Edward Island (UPEI)'s Robertson Library, in partnership with the province and the UPEI Student Union, created the Open Education Resource Development Program which launched in 2020 (Atkinson, 2020). This program assists faculty in developing and publishing OER largely through a variety of grants and a self-publishing platform and catalogue of open textbooks on Pressbooks (University of Prince Edward Island. Robertson Library, n.d.). The Nova Scotia Community College (NSCC) Libraries⁴¹ also has a strong presence on Pressbooks via their NSCC Libraries Pressbook network (NSCC, n.d.c).

Yukon

At the institutional level, YukonU does not have an OER specific grant, though it does provide funding opportunities such as the Scholarly Activity Grant (SAG) to faculty, staff, and students engaged in research activities (Yukon University, 2019). SAG can be used to cover several expenses such as course release for faculty (at a maximum of \$10,000 per course) or staff wages, as well as student wages, supplies and materials, and other research-related expenses for a period of 12 months after approval of the research proposal (Yukon University, 2019).

The Scholarly Activity Grant can be used for Scholarship of Teaching and Learning projects that may result in the development or adaptation of OER. In fact, the fund has been used recently in projects intended to produce/adapt OER more in line with the Northern context and unique needs of YukonU programs.⁴² However, it is important to highlight that the objective of SAG is to provide financial support to any type of research by YukonU faculty or staff, whether or not it is directly related to student learning. For this reason, OER

⁴⁰ There are a total of 92 publications from NSCC Libraries Pressbooks, Atlantic Canada Pressbooks Network, and UPEI Pressbooks Network combined, none of which are in French (Pressbooks, 2021).

⁴¹ NSCC has 13 campus libraries located across Nova Scotia and is a member of Novanet, a library consortium that provides access to 12 post-secondary library collections in Nova Scotia and New Brunswick (NSCC, n.d.a).

⁴² An example includes the textbook *ECHO: Ethnographic, Cultural and Historical Overview of Yukon's First Peoples* (Castillo et al., 2020).

projects whose nature cannot be promptly framed in the lens of research (for example, if the intention is to simply incorporate interactive H5P content to existing open materials or the creation of ancillary resources) might face more difficulties obtaining funding through SAG.

Externally, YukonU faculty have had support from BCCampus for some individual OER projects. Currently, the Yukon Government does not offer specific funding for development or adaptation of Open Educational Resources.

Northwest Territories

To our knowledge, there are no specific OER programs, policies, or funding in the Northwest Territories. However, Aurora College does use OER. As part of the University of the Arctic Thematic Network (TN) on Northern Nursing Education. Aurora College uses some OER created elsewhere for the program in the support of Nursing education.

Nunavut

As far as it is known, there are no specific OER programs, policies or funding in Nunavut; however, OER is used. For example, as part of the University of the Arctic Thematic Network (TN) on Northern Nursing Education. Nunavut Arctic College uses OER in the support of Nursing education.

Pan-Canadian OER

There is a diversity of open education and OER initiatives at a pan-Canadian level. The Council Ministers of Education, Canada (CMEC) endorsed OER in both 2012 and 2013, with one press release noting, “With regard to OER, ministers reaffirmed their commitment to open access to knowledge and education and to the need to adapt teaching and learning practices to the new realities of the information age” (Council Ministers of Education, 2012).

Canada has an emerging set of pan-Canadian forums for OER scholarship, technologies, and discussion. The Canadian Association of Research Libraries (n.d) has a dedicated OER working group and has undertaken a variety of initiatives to enhance awareness and use of OER. Open/Technology in Education, Society and Scholarship (OTESSA) (n.d.a) was founded as a not-

for-profit in June 2019. As a member of the Federation of the Humanities and Social Sciences (FHSS), OTESSA hosts an annual conference as part of the FHSS Congress, and it also has a journal that provides a venue for Canadian OER related scholarship (n.d.b). Complementing OTESSA, one of the leading open educational journals, the *International Review of Research in Open and Distributed Learning (IRRODL)*, is produced out of Athabasca University. *IRRODL*'s Editor-in-Chief is Professor Rory McGreal, a UNESCO/Commonwealth of Learning/International Council for Open and Distance Learning Chair in Open Educational Resources (Athabasca University, n.d.). Canada has also made notable contributions to the worldwide OER ecosystem through organizations such as Pressbooks (2022b), an open source content management system for creating digital books, and the Rebus Foundation (n.d.), a Montreal based not-for-profit that has helped advance a variety of open education initiatives. Pressbooks and Rebus provide solutions advancing OER not just in Canada but globally.

Canadian Institutional Examples

While national and provincial efforts are progressing open education policy and practice, academic institutions have begun to develop strategies, funding, and practices that support student advocacy efforts and faculty engaging in transitioning to open education practices. The following highlight a few of the ways these institutions are supporting the growth of OER on campuses across Canada.

Strategic plans, frameworks, and institutional policies at some academic institutions have begun to include direct language around open educational practice and OER development (Janke, 2020). Kwantlen Polytechnic University developed a strategic plan for OER development that includes fostering the adoption and creation of OER, increasing the Zero Textbook Cost (ZTC) program, and the creation of institutional open education (OE) policy (Jhangiani, 2018). The University of Ottawa strategic plan includes a goal to develop Open Education Resources (OER) in French, an area needed to improve the reach of OER nationally (University of Ottawa, n.d.). In addition to open education language in the strategic plan for UBC, the Educational Leadership Stream Guide to Reappointment, Promotion, and Tenure Procedures directly recognizes OER creation as evidence of educational leadership, providing faculty with formal recognition of their efforts in the area

OER in regards to tenure and promotion in the teaching stream (University of British Columbia, 2020).

Academic institutions are developing funding opportunities, including adjustment of existing teaching and learning internal grant opportunities and the development of new grant programs, to support OER development. Many of these grant opportunities are developed in partnership with the student unions on campus and focus on increasing awareness and adoption of OER into programs at their institutions.⁴³ Other grant opportunities are developed and piloted in partnership with provincial organizations (e.g., BCcampus, eCampusOntario) to increase capacity of OER development on campuses.⁴⁴

Finally, the need for services at academic institutions that directly support OE and OER development has required an adjustment of existing work, the creation of new supports, and in some cases, the development of positions that assists in OER development. There are several different models emerging in academic institutions to align new positions with OER. While the development of new units for OE is rare,⁴⁵ the creation of a team-based approach to OE support that coordinates efforts across campus units is much more common.⁴⁶ Additionally, many academic libraries are developing positions that, at least in part, have OE as a part of the job description (Askin et al., 2020).

⁴³ Examples of OE in strategic plans include University of British Columbia (2018), SAIT (2019), and University of Ottawa (n.d.).

⁴⁴ Examples of OE funding in partnership with students include Concordia University Library (n.d.) and the University of British Columbia. Vancouver Campus (n.d.).

⁴⁵ An example of OE funding in partnership with provincial organizations is UBC Okanagan (Janke, 2020).

⁴⁶ Examples of team-based services include the University of Alberta (Brailey et al., 2021) and the University of British Columbia. Vancouver Campus (n.d.).

Appendix 2 - OER Relevant Calls to Action from the Truth and Reconciliation Commission of Canada (TRC)

The following TRC Calls to Action (2015) are relevant to a Canadian OER framework.

Action 7: We call upon the federal government to develop with Aboriginal groups a joint strategy to eliminate educational and employment gaps between Aboriginal and non-Aboriginal Canadians.

Action 12: We call upon the federal, provincial, territorial, and Aboriginal governments to develop culturally appropriate early childhood education programs for Aboriginal families.

Action 14: We call upon the federal government to enact an Aboriginal Languages Act that incorporates the following principles:

Action 14.i: Aboriginal languages are a fundamental and valued element of Canadian culture and society, and there is an urgency to preserve them.

Action 14.iv: The preservation, revitalization, and strengthening of Aboriginal languages and cultures are best managed by Aboriginal people and communities

Action 57: We call upon federal, provincial, territorial, and municipal governments to provide education to public servants on the history of Aboriginal peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Aboriginal-Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.

Action 62.i: Make age-appropriate curriculum on residential schools, Treaties, and Aboriginal peoples' historical and contemporary contributions to Canada a mandatory education requirement for Kindergarten to Grade Twelve students.

Action 62.iii: Provide the necessary funding to Aboriginal schools to utilize Indigenous knowledge and teaching methods in classrooms.

Action 63: We call upon the Council of Ministers of Education, Canada to maintain an annual commitment to Aboriginal education issues.

Action 63.i: Developing and implementing Kindergarten to Grade Twelve curriculum and learning resources on Aboriginal peoples in Canadian history, and the history and legacy of residential schools.

Action 63.ii: Sharing information and best practices on teaching curriculum related to residential schools and Aboriginal history.

Action 63.iii: Building student capacity for intercultural understanding, empathy, and mutual respect.

Action 63.iv: Identifying teacher-training needs relating to the above.

Action 64: We call upon all levels of government that provide public funds to denominational schools to require such schools to provide an education on comparative religious studies, which must include a segment on Aboriginal spiritual beliefs and practices developed in collaboration with Aboriginal Elders.

Action 93: We call upon the federal government, in collaboration with the national Aboriginal organizations, to revise the information kit for newcomers to Canada and its citizenship test to reflect a more inclusive history of the diverse Aboriginal peoples of Canada, including information about the Treaties and the history of residential schools.

Appendix 3 - United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) Articles Relevant to OER

The following are relevant UNDRIP Articles (2007, pp. 5-6) for a Canadian OER framework:

Article 13.1: Indigenous peoples have the right to revitalize, use, develop and transmit to future generations their histories, languages, oral traditions, philosophies, writing systems and literatures, and to designate and retain their own names for communities, places and persons.

Article 13.2: States shall take effective measures to ensure that this right is protected and also to ensure that indigenous peoples can understand and be understood in political, legal and administrative proceedings, where necessary through the provision of interpretation or by other appropriate means.

Article 14.1: Indigenous peoples have the right to establish and control their educational systems and institutions providing education in their own languages, in a manner appropriate to their cultural methods of teaching and learning.

Article 14.3: States shall, in conjunction with indigenous peoples, take effective measures, in order for indigenous individuals, particularly children, including those living outside their communities, to have access, when possible, to an education in their own culture and provided in their own language.

Article 15.1: Indigenous peoples have the right to the dignity and diversity of their cultures, traditions, histories and aspirations which shall be appropriately reflected in education and public information.

Article 15.2: States shall take effective measures, in consultation and cooperation with the Indigenous peoples concerned, to combat prejudice and eliminate discrimination and to promote tolerance, understanding and good relations among indigenous peoples and all other segments of society.

Appendix 4 - Justifying New Federal Expenditures For Costing OER Proposals

This section aims to provide some context for costing proposals by identifying existing federal funding in potential funding envelopes (budget lines), summarizing previous national OER funding proposals, briefly commenting on potential returns for funding, and concluding by noting some related and ongoing barriers to OER adoption that should be considered in funding proposals.

Recognizing the complexity of funding proposals, and the fact that national stakeholders and advocates may have a range of post-secondary funding priorities, the proposed “Dimensions of a National Approach” does not articulate dollar amounts.

Potential Funding Envelopes

The Government of Canada has a variety of funding envelopes (*Table 1 - Federal Budget Lines and Planned Expenditures*) that either directly invest federal dollars into Canada’s post-secondary system or fund programs that could support OER development. The largest and most possible federal funding envelope is the combined budgets of the Tri-Agencies totalling roughly \$3.8 billion (Government of Canada, 2023a, pp. II-28, II-145, II-187)). While several previous proposals (see below) have been made in the \$8 to \$10 million range, this represents less than one third of one percent of the Tri-Agencies combined budget.

A secondary set of potential funding envelopes can be found in major departments - specifically Canadian Heritage, Employment and Social Development Canada (ESDC), and Innovation, Science and Economic Development Canada (ISED). Different program expenditures from these departments total nearly \$1 billion (Government of Canada, 2023a, pp. II-60, II-69, II-89). The federal government also has a series of targeted educational expenditures for Indigenous peoples and veterans. While these programs are extant, given the nature of the programs calls for OER support related to these programs should clearly be framed as requiring increased (as opposed to repurposed) expenditures.

While determining potential funding envelopes is key for some federal OER proposals, it is important to also recognize that many of the actions the federal government can take are policy-based and could be made via changes in policy.

Previous Federal OER Proposals

In supporting proposals or OER funding numerous sources exist that document the potential returns of such investment. BCcampus (n.d.c) estimates that its initiatives have saved students a total of nearly \$28 million in 10 years. eCampusOntario (n.d.a) estimates that its cumulative cost savings are \$13.6 million. With specific regards to return on investment, Open Oregon calculated that each dollar spent in OER generated \$14 in student savings (Open Oregon, 2019).

Given the volume of spending in potential funding envelopes, previous budgetary proposals have been quite modest. Most notably, in 2017 the House of Commons Finance Committee made a recommendation for an OER pilot with no fixed dollar recommendation. The text of that recommendation was:

Recommendation 19

Support a pilot grant through the Social Sciences and Humanities Research Council of Canada, the Natural Sciences and Engineering Research Council of Canada and the Canadian Institutes of Health Research that would provide students and faculty with an incentive to develop open educational resources (House of Commons Standing Committee on Finance, 2017, p. 46).

That recommendation stemmed from the 2017 pre-budget consultation submission of the Canadian Alliance of Student Associations, which proposed an \$8 million Tri-Agency funded OER pilot (CASA, 2017).

More recently, several groups have put forward recommendations in advance of the 2022 budget. Colleges and Institutes Canada recommended “OER to train all students, faculty and staff on the history of Indigenous peoples and the legacy of residential schools, Indigenous rights, legal and health issues,” but with no specific dollar amount proposed (2021, p. 2). The Canadian Association of University Teachers (CAUT) (2021, p. 4) proposed an \$8 million Tri-Agency funded pilot. CARL (2021, p. 4) and CASA (2021, p. 8) both proposed a \$10 million Tri-Agency initiative for production of OER in both official languages.

Ahead of the 2023 budget, CARL proposed a total of \$30 million for open education resources and support in the areas of policy and infrastructure, Indigenous OER, and the production of OER in both official languages (CARL, 2022, p. 4). Open/Technology in Education, Society and Scholarship Association (OTESA) (2021, p. 2) proposed \$100,000 for an expert panel on open education, \$300 million for provinces and territories in support of OER, \$75 million for related educational technology, \$20 million for academic chairs, \$10 million for associations, and \$250,000 to enable a certification process.

Table 1: Federal Budget Lines and Planned Expenditures

Federal Budget Line (2023-24 Estimates Part I and II) (Government of Canada, 2023a)	Total Planned Expenditure
Social Sciences and Humanities Research Council (p. II-187)	1,155,330,288
Natural Sciences and Engineering Research Council (p. II-145)	1,318,006,612
Canadian Institutes of Health Research (p. II-28)	1,351,640,781
Canada Foundation for Innovation (ISED) (p. II-89)	457,411,833
CANARIE Inc. (ISED) (p. II-89)	40,600,000
Mitacs inc. (ISED) (p. II-89)	188,619,962
Council of Canadian Academies (ISED) (p. II-89)	6,000,000
Canada Book Fund (Grants) (Heritage) (p. II-60)	41,990,717
Canada Book Fund (Contributions) (Heritage) (p. II-60)	10,200,000
Enhancement of Official Languages Program (Heritage) (p. II-60)	187,136,655
Sustainable Development Goals Funding Program (Grants) (ESDC) (p. II-69)	4,600,000
Existing Commitments that could be Increased with OER Component	
Grants to Support the First Nations Post-Secondary Education Strategy (p. II-85)	977,000
Contributions to Support the First Nations Post-Secondary Education Strategy (p. II-85)	308,695,447

Contributions to Support the Métis Nation Post-Secondary Education Strategy (p. II-85)	39,765,968
Contributions to Support the Inuit Post-Secondary Education Strategy (p. II-85)	9,825,958
Education and Training Benefit (Veterans Affairs) (p. II-110)	33,226,000
Children of Deceased Veterans Education Assistance (p. II-110)	978,000

As indicated in the table above there is \$4.7 billion in existing funding envelopes that could be used to support, to some degree, OER funding. With regard to the second part of the table, the additional \$393 million represents federal investments to education; however, given the nature of these expenditures, any funding of OER through these envelopes should be approached as increases in expenditures.

Appendix 5: National Advocacy Approaches

The 27 Advocacy Approaches

This report has 27 approaches for the Federal Government in terms of actions that could be taken to support and strengthen the OER ecosystem in Canada, that align with the priorities advanced in the section 5. *Priorities of a National Approach to Open Education*.

Canadian Culture & Language, Francophone OER

1. Incentivize the development and adaptation of OER to include Canadian research outputs and heritage information, including but not limited to:
 - 1.1. Canadian research outputs (e.g. quantitative and qualitative data) that reflect the uniqueness of the Canadian population's experiences and lives;
 - 1.2. Canadian cultural and heritage content, including the Canadian media, the arts, and gallery and museum content.
2. Ensure funding for creation of French and bilingual OER, including but not limited to:
 - 2.1. Creation or adaptation of OER that take into consideration the unique cultural contexts of linguistic minorities across the country;
 - 2.2. OER or open content to support teaching and learning at the 22 postsecondary French or bilingual institutions located in a linguistic minority setting (outside of the province of Québec) as well as English speaking learners in Québec.⁴⁷
3. Incentivize provincial development of OER to reflect the education actions as detailed in the Truth and Reconciliation Commission. (See *Truth & Reconciliation* below)

Accessibility

4. Provide supports that incentivize provincial open education programs focusing on accessibility and universal design for learning, including but not

⁴⁷ A list of the 22 institutions can be found on the [ACUFC](#) website.

limited to:

- 4.1. Collaboration with existing organizations (e.g., National Educational Association of Disabled Students) in training for educational service sectors on universal design for learning principles and accessibility standards⁴⁸ and their application in open educational development;
 - 4.2. Curation of existing open educational materials authored by and/or in collaboration with those who identify accessibility barriers in support of identifying exemplars of accessible educational resources and the potential for use nationally. (See - *Infrastructure Request* below)
5. Provide supports for interprovincial projects that prioritize sharing of expertise and resources in support of accessibility and universal design for learning principles in open education resource development, including consideration of:
- 5.1. Provision of incentives to identify and convert existing high quality, high impact published OER to meet accessibility requirements for use nationally, including collaborations with existing provincial organizations and associations responsible for OE development and accessibility in education;
 - 5.2. Incentives for projects focusing on UDL principles;
 - 5.3. Incentives for projects that develop diverse collaborations for the creation of accessible resources, including students who identify as disabled

Truth and Reconciliation: Indigenous OER

6. Consult with Indigenous communities and stakeholders to address the need for Indigenous Knowledge incorporation in OER, when appropriate.
7. Adopt best practices for the sharing of Indigenous Knowledges that align with specific local/community based protocol
8. Integrate OCAP and the Global Indigenous Data Alliance (GIDA) principles into OER development.
9. Adopt and incorporate Local Context Traditional Knowledge (TK) labels and licenses into Indigenous OER.

⁴⁸ See, for example, the Web Content Accessibility Guidelines (WCAG) published by the Web Accessibility Initiative of the World Wide Web Consortium.

10. Incentivize revision of current Indigenous OER to incorporate TK labels and licenses into published materials.
11. Support the development of OER that supports curriculum for on-reserve learners, and for urban Indigenous learners.
12. Support for the development of OERs by on-reserve educators and community members.
13. Incentivize the development of culturally relevant OERs.⁴⁹
14. Support the creation of Indigenous language OER.
15. Collaborate with Indigenous communities and language speakers on specific needs for the creation, and long-term use of Indigenous language OER.
16. Incentivize existing Indigenous language programs to adopt or transition to the use of OER.

Open Licensing of Federally Produced and Funded Educational Materials

17. Release all federally published educational materials under a substantively open license, specifically and ideally a Creative Commons Attribution 4.0 international license (Creative Commons, n.d.b).
18. Expand the Tri-Agency Open Access Policy on Publications to ensure that all educational materials produced as accompanying materials to a funded research project, regardless of format, be published under an OER-compatible Creative Commons license.⁵⁰
19. Require Government of Canada funding recipients producing training or educational materials to license such materials under an OER compatible Creative Commons license.
20. Ensure any Government of Canada funded training/educational materials produced by recipients of Government of Canada funds be released under a Creative Commons license and placed in a publicly accessible OER repository.

⁴⁹ One recommendation in the Report of the Standing Committee on Finance *Considering The Path Forward* pre-budget document, Recommendation 67, makes reference to OER: “open educational resources to train all students, faculty and staff on the history of Indigenous peoples and the legacy of residential schools, Indigenous rights, legal and health issues” (Canada. Parliament. House of Commons. Standing Committee on Finance, 2022).

⁵⁰ Specifically, both Creative Commons licenses that carry the “No Derivatives” element (CC BY-ND and CC BY-NC-ND) are not considered sufficiently open/OER compatible. See Vézina (2020) and the Community College Consortium for OER (n.d.).

Federal Funding for Pan-Canadian OER Enablement and Capacity Development

21. Engage with provincial and institutional and consortial repositories to determine if a national OER repository is required and to study feasibility of this approach and suitable alternatives including a federated national repository.
22. Coordinate with provinces to ensure, where necessary, national infrastructure can be used to eliminate duplication and increase collaboration for provincial and territorial OER efforts.
23. Continue and expand support for initiatives that enable OER usage including funding for digital literacy and broadband connectivity.
24. Support national OER coordination and collaboration by providing ongoing funding for an annual stakeholder meeting and additional activities as necessary

Federal Infrastructure and Policy

25. Support and fund the development and maintenance of federal infrastructure platforms or services that support the creation, adoption, adaptation, and discoverability of Canadian-produced OER.
26. Produce a public statement in alignment with the UNESCO Recommendation on OER (2019) in order to affirm it wishes to meet our international commitments in this area.
27. Develop National policies that support the creation, adoption, and sustainability of OER.