

Global Open Knowledge Hub Workshop Report:
Engaging in Open Knowledge through Partnerships

Institute of Development Studies, 21-23 October 2015



Workshop Aims

The Global Open Knowledge Hub (GOKH) is a technical and content driven programme which aims to develop new technical infrastructures and standards that support increased access and availability of research knowledge.

In October 2015, IDS hosted a three day GOKH workshop which brought together representatives from the ten core partners in the project, new partners, members of the project advisory group and other experts working in the open knowledge field .

The first two days of the meeting brought GOKH partners together to:

- Share partners' experiences and learning on the adoption of open knowledge approaches based on the work carried out in the first two years of the project.
- To plan ahead and develop activities and actions to take the GOKH programme forward beyond March 2016 when the initial three year phase was due to be completed.

On day three we were joined by a wider group of participants, including staff from DfID, the GOKH project funder. The intention was to broaden the discussion and explore what was known about the demand for open knowledge to support evidence-informed policy from both within the GOKH project and beyond. The overall intention was to advance understanding of open knowledge among the participants and identify future pathways and priorities for action.

This document reflects on the approach taken and summarises some of the views and recommendations expressed.

Attendees

Forty eight people attended the event over the course of three days representing 22 organisations. For a full attendees list please see appendix 1.

Presentations and resources

Presentations and background papers from the event can be found here:
<https://drive.google.com/open?id=0Byz8bHy6tH-4OURnVHhnYmZZanM>.

Sessions on Day three were recorded and links to the live stream were sent to partners and interested parties who were unable to attend in person. These sessions are available to watch again here:

Kelly Shephard, Head Open Knowledge and Digital Services, IDS. **GOKH Overview**

Melissa Leach, IDS Director
Why Open Knowledge is Critical

Tarah Friend, DfID, Research Uptake Manager,

DfID and Open Data: Improving Access to Evidence

<https://www.youtube.com/watch?v=uB0hnonmCBc>

IDS Seminar: Evangelia Berdou, IDS Fellow,

Open Knowledge: Rethinking opportunities, costs and barriers

The Internet has created new opportunities for information dissemination and co-creation. Even a cursory glance at Wikipedia, however, shows that these opportunities are not taken up equally. Few, in fact, would challenge the idea that the Internet is far from being a repository for all human knowledge. However, progress is undoubtedly being made. A 2013 study showed that languages other than English are on the up. Universities, scholarly communities and donors are also increasingly endorsing open access policies. What does this mean for open access and knowledge co-creation? Is it reasonable to expect that the job of open knowledge proponents and information intermediaries dedicated to addressing knowledge inequities will become easier in the coming years? Or are there still important 'sticky' points and blind spots with regard to open access and information co-creation that remain to be addressed?

The seminar draws from the experiences of the partners in the Global Open Knowledge Hub to explore some of these issues.

<http://www.ids.ac.uk/events/open-knowledge-rethinking-opportunities-costs-and-barriers>.

In addition to a set of slide presentations and workshops, a number of partners displayed posters detailing the impact the GOKH programme had on their work.

These included:

Open Index Initiative [OII]

Indira Gandhi Institute of Development Research, Mumbai, India

About OII:

OII is an online and searchable bibliographic database for selected Indian Social Science literature and resources available in certain Indian libraries. It has adopted participatory approach for data contribution from members.

OII indexes selected:

- Indian Social Science journals
- Discussion/Working papers/Theses and dissertations emanating from Indian Social Science research institutes
- Provides links to resources available in Indian Social Science libraries through the search engine

More info at: <http://oii.igidr.ac.in>

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Impact of Global Open Knowledge Hub [GOKH] on OII:

Participation in GOKH project has enabled us to:

- Conduct a workshop for OII stakeholders
- Know more about Open Data
- Clarity on copyright related issues regarding metadata
- Better understanding of Open Licensing/Creative Commons License
- Have MOUs with partnering institutions and publishers
- Increased contribution of metadata
- Sharing of metadata with other partners
- Explore feasibility of developing a Thesaurus in collaboration with other partners
- Work on data exchange format



Several of the partners (including Agnes Chikonzo from the University of Zimbabwe, pictured) participated and presented at an informal IDS networking event on day two. Here we discussed the GOKH programme and more broadly our commitment to open access as part of a wider IDS celebration of Open Access week (19-25th Oct 2015).



Running Order

Day 1:

1000 – 1045 – Kelly Shephard, Head Open Knowledge and Digital Services, IDS,
Welcome and housekeeping
Objectives of the workshop

1045 - 1230 – Alan Stanley, Editor Eldis.
Understanding the Open Knowledge Landscape

1230-1315 – Yaso Kunaratnam
What have we learned? – Discussing Learning from across the GOKH programme

1415 -1530 - Yaso Kunaratnam/Peter Mason/Alan Stanley
Peer Assisted Learning Surgery

1530 – 1630 – Kelly Shephard and three partners
IDS Networking event - an opportunity to share ideas, discuss new opportunities, develop new relationships.

1630 – 1715 – Ruth Goodman/Helen Bailey
Stories of Change
1715 – Kelly Shephard- Wrap-up

Day 2

1000 -1200 – Alan Stanley/ Peter Mason
Use of Content - what do we know about current usage and demand, what more needs to be done?

1200 – 1300 – Paola Brambilla + partners
Complexities of multilingual work

1400 - 1700 – Alan Stanley/Kelly Shephard
Modelling the Future

Day 3

1000 – 1015 – Kelly Shephard
Welcome - Overview of the past two days

1015 – 1100 – Melissa Leach, IDS Director
Why Open Knowledge is Critical

1100 -1145 – Tarah Friend, DfID, Research Uptake Manager,
DFID and Open Data: Improving Access to Evidence

1200 – 1330 – IDS SEMINAR- Evangelia Berdou, IDS Fellow,
Open Knowledge: Rethinking opportunities, costs and barriers

1415 – 1530 –Hannah Corbett, IDS Communications and Engagement Manager
Case Study: **Open Access and the Challenges for IDS**

1415 – 1530 –Iryna Kuchma, eIFL Open Access Program Manager
Open Access in developing countries: Experiences, challenges, collaborations

1615 – Kelly Shephard
Wrap-up

Workshop Sessions:

Many of the presentations given provided food for thought and can be viewed here <https://drive.google.com/open?id=0Byz8bHy6tH-4OURnVHhnYmZZanM>.

However a number of the more interactive sessions provided opportunities to discuss specific problems or opportunities in the programme. Key outputs and headlines from these more interactive sessions included:

Learning

Two learning papers were presented for feedback. These were developed to address the learning needs identified in a 2014 partner survey. Based on the feedback from partners the final versions of these papers have now been published and are available in OpenDocs.

Playforth, R. (2015) Licensing open content. Brighton: IDS

<http://opendocs.ids.ac.uk/opendocs/handle/123456789/7121>

The purpose of this paper is to provide a brief general introduction to the Open Licensing of content with a particular focus on the licensing of bibliographic information (metadata) about research publications. The paper highlights the use of the Creative Commons suite of licenses as the most widely used and understood standard for licensing open content.

Colmer, S. and Stanley, A. (2015) Introducing open knowledge as an approach to knowledge sharing in global development. Brighton: IDS

<http://opendocs.ids.ac.uk/opendocs/handle/123456789/7122>

The purpose of this paper is to provide a brief overview of the key open knowledge definitions and concepts as they relate to the application of open knowledge approaches in knowledge sharing for global development.

A video slideshow version of the open licensing paper is also available here: <https://www.youtube.com/watch?v=may0hFFmlck>

A third paper on stories of change has since been finalised based on the session developed for the partner meeting and delivered on day one.

Stories of change; Bailey, Helen; 2015. Brighton: IDS

<http://opendocs.ids.ac.uk/opendocs/handle/123456789/7141>

This paper provides a brief introduction to stories of change as a tool for communicating progress and the value of a given project in an interesting and accessible way.

Problem Solving

The Peer Assist Surgery held on day two saw the participants address four problems and challenges identified during the course of the project to date. The four challenges were:

Peer assist one: How do we attain researchers buy-in in the creation of open knowledge platforms?

Patient: Elizabeth Mambo, Sub-Librarian at College of Health Sciences, University of Zimbabwe

Suggested solutions included: work with students rather than faculty; use of altmetrics to articulate the value; provide examples of beneficiaries; provide environments for open discussions.

Peer assist two: How do we get partners to agree to open license their content? What should the process be?

Patient: Makelesi Gonelevu, SPREP, Samoa

Suggested solutions included: Get context specific advice on licensing, provide analytics and feedback, start with small data sets to experiment with.

Peer assist three: What processes should I use to revamp our website?

Patient: Kemly Camacho, Director - Anacaonas, Sula Batsu

Suggested solutions included: use persons to help shape content and identify key areas for the website; use simple language; build with partners who are part of the target audience; use the human element to explain research in clear terms.

Peer assist four: How can we address concerns that the hubs/portals are competition for content partners?

Patient: Laura Meggiolaro, Land Portal

Suggested solutions included: change the stats that donors use; create new co – constructed funding products; attribute data and add partner links.

Future direction and commitment to open knowledge

Two sessions on day two looked at different aspects of the future direction of the programme and the work associated.

One group considered how to build the OKhub consortium. Space was given to share hopes and vision for the future of the hub. Participants were asked to consider the benefits of being part of the consortium and to think through some of the building blocks necessary.

Using the language of outcome mapping we identified:

What we expected to see: technical infrastructure to enable a range of partners to contribute content to a central store and hopefully taking content out; some partners will begin to act as regional / sectoral nodes.

What we would like to see: In the process of building the model we would begin to see collaborations between partners for example this is evident in a growth of relationships in some thematic areas such as a stronger partnership developing between Sulabatsu/Genre Action through their shared gender focus.

What we would love to see: ultimately that the OKhub would evolve into a network of collaborative collaborative relationships. The partners would be sustaining the hub by sharing learning and content.

This discussion resulted in a presentation on day three that looked at four areas required to grow the hub and increase sustainability:



Actions detailed included:

- The need to map areas of shared learning
- Develop an advocacy toolkit
- Develop a roadmap
- Develop and agree a suite of communication tools for the consortium to use
- For all partners to use the hub
- Collate stories of change from each partner
- Develop a proposal for future funding
- Communicate shared goals
- Outreach to other open knowledge initiatives
- Agree and enforce standards

All of the partners in this session agreed that as partners in the GOKH consortium there should be an agreed set of principles. Each agreed to endeavour to:

- take a SHARED LEARNING approach, valuing partners' different knowledge, perspectives and ideas

- offer PEER SUPPORT wherever possible to enable all partners to contribute to the common project
- be PROACTIVE in managing our relationships and seek opportunities for wider collaboration as a basis for longer term interaction
- look to learn from and IMPROVE our work as a result of the project and interactions with partners
- be SENSITIVE to partners' motivations, interests, goals and constraints in the project
- be FLEXIBLE in managing difference. We will engage in dialogue throughout our shared project work to understand and manage difference in working cultures, language, and access to resources.
- embrace the principles of OPENNESS in our approach to sharing information – promoting availability and access; reuse and redistribution; and universal participation.

In the second group the BLDS led the discussion on how to make development knowledge available, accessible and readable. This followed the circulation of a concept note that details the proposed future direction for a Global Library of Development Studies.

Conclusion and next steps:

This workshop was widely perceived as a success (see annex *Participants Feedback*)

Immediate next steps have included:

- Terms of Reference have been scoped and sent to partners detailing a number of areas of ongoing work. These include - developing a shared integrated information ontology of climate change terms (building on the existing work of Eldis partners CCCCC and SPREP and on REEGLE's climate tagger); to improve end user searching and retrieval, which will be tested against identified use cases, published as Linked Open Data and made ready for implementation on OKhub and partner sites
- Developing a new learning paper on the complexities of multilingual working, to be published in French, Spanish and English by March 2016.
- Launching a small technical innovation call to help partners to use hub content more effectively.
- Publicising the availability of the OKhub tools and API including the HTML widget that was launched at the meeting.

- Partner staff exchanges: Two short term staff exchanges to share experience and learning around GOKH and the adoption of open knowledge approaches will take place in Q4 involving Soluciones Practicas and the Caribbean Community Climate Change Centre

Longer term activities will build on what is widely perceived to have worked across the programme. This includes recognition that:

Open Knowledge is a cross-cutting issue- many of the partners talked about a desire to work collectively (which is amazing when you consider that thematically and geographically they are so diverse), but how do they continue to that when the programme ends?

Moving forward we are committed to convene a partner governance/sustainability working group to take forward development of the business plan and supporting materials for the partner consortium post GOKH.

The expected outcomes we are looking for from this work would be:

- Common agreement among the core group of project partners on a preferred "consortium" model and governance arrangements for the project beyond the current phase
- Final agreement on statement of shared vision and principles
- Understanding of commitments, the particular roles that existing partners want to play in the "consortium" plus our expectations regarding taking on new partners (selection criteria and process for joining)
- Agreement on the approach to the sustainable hosting and management of the technical infrastructure relating to the project
- Adoption of a clearly articulated business model and strategy for the future development of the project

Expected deliverables would include:

- A project "Manifesto" document setting out the project vision and values, partnership model and membership criteria
- A draft template MoU for partners detailing a governance model and commitments
- A strategic plan to take the OKhub forward (including mapping of relevant stakeholders -potential partners and funders)

"If you are selling apples in a closed room, nobody will know that you are selling apples. You need to open the doors and let people see into the windows to see what you are selling"

Rohit Bhatia, 3ie

Context is king - Opening up knowledge is one thing however when it has most impact is when it is put in context and shared with networks.

Moving forward we are committed to build on the networks we already have access to through the partner group.

We will also document use cases and develop further stories of change to assist partners in advocating for engagement with the OKhub project and adoption of open knowledge approaches.

Our commitment to multilingual work will also see a learning paper being published in spring 2016. The other learning papers in the series will also be translated into French and Spanish.

"If there is one thing you do when you leave here, it's you have to go and contribute to the hub. We have to make commitments now!"

Mark Lewis, ELLA

Making connections and building a fertile environment for collaboration is essential –

Throughout the event, partners contributed extensively with presentations, interventions as panellists, and as facilitators in group sessions. They shared their experiences, learnt from other partners' experiences, and created links with other organisations for future collaborations and exchanges. In the case of the BRIDGE partners this was the first time that the partners from both regions (Latin America and francophone) worked together face-to-face and this has led to a number of new collaborations between them.

Moving forward we are committed to develop a new learning paper and toolkit of resources to help partners to design and run open licensing workshops for their own stakeholders (based on the successful model developed for the IGIDR workshop in 2015).

We are also in conversation with The Open Data Institute (who are members of the International Advisory Group for GOKH) to discuss other available networks and ways to collaborate, equip and connect beyond the GOKH programme.

"It's not enough to just share knowledge, we need to build capacity to use and improve understanding"

**Kemly Camach,
Sulabatsu**

Tools need to work but they also need to be used -

Improvements to the OKhub will continue including new plugins to interact with popular content management systems; the launch of the widget; and more connected taxonomies are planned. However one point came through very clearly

– the technical tools can be provided but they alone will not lead to greater accessibility of information.

Put simply they must be used. To this end we are committed to improve the hub but the partners themselves made a commitment at the event to upload content into the OKhub and to work to extract materials from the hub.

Annexes:

1) Attendee list:



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2) Participants feedback on the event:

Participants were asked to complete an anonymous feedback form at the end of the three day event. Overall, the 14 responses were very positive.

- On a four point scale from 'Very satisfied' to 'Very dissatisfied', eight out of 14 respondents were 'Very satisfied' and the remaining six were 'satisfied' with the event.
- Respondents were asked what they thought were the three key issues that emerged during the discussions. The following issues were cited most frequently in respondents answers:
 - Partnership building/networking (*six respondents*)
 - Open data/knowledge (*five respondents*)
 - Commitment to future/sustainability of the Hub (*four respondents*)
 - Contributing more content to the hub (*three respondents*)
 - Technical issues (*three respondents*)
 - Multilingual content (*two respondents*)
 - Consortium building (*two respondents*)
 - Promoting the hub/open data (*two respondents*)
- Eleven out of 14 respondents were not able to identify any key issues that should have been included but were not adequately addressed at the event. The three remaining respondents identified the following issues:
 - "Technology related issues such as taxonomy and matrices"
 - "Issues surrounding increasing the partners use of the hub (uploading and extracting more)"
 - "Issues surrounding the monitoring of hub content."

- Partners believed their participation in the event would influence their work in a variety of ways. Advocating the spread of open data and the possibility of working with partners were both cited by two respondents each, however the other responses were varied, including:
 - “Made me think of different models of working together using the hub”
 - “Need to identify content that will inform policy decisions. Will go and identify local content that will support timely solutions to development challenges facing my country.”
 - “I believe that our contributions on the OKhub will be more proactive. We'll update needed information and contribute more relevant materials”
- Partners were also asked what the single most valuable aspect of the event was for them. Nine respondents included networking and learning from partners in their answers. Two respondents did not answer the question, and two found learning more about open knowledge most valuable.
- Respondents were then asked to rate their agreement with a number of statements, the results of which are shown in the following table:

	No. of respondents				
	Strongly agree	Agree	Disagree	Strongly disagree	Blank
My personal or professional work will change because of the event	2	12	0	0	0
I was exposed to new ideas and perspectives	8	6	0	0	0
The event was facilitated effectively	7	6	0	0	1
Relevant institutions and stakeholders were well represented	4	8	0	0	2
I made contacts outside of my usual peer group	6	7	0	0	1
I am likely to follow up with the contacts I made at the event	8	5	0	0	1

- Respondents were also asked what they would improve about the event. Of the ten responses received to this question, three wanted to have more time and two respondents noted logistical/dietary suggestions. The remaining responses are as follows:
 - “Share more about the partners before the event so we can know about them.”
 - “Bit more technical session”
 - “I think IDS could be a little more directive. It's good for partners to be part of the project and IDS could take more advantage from this.”
 - “Nothing really. Peer assist was very insightful - always useful to hear about other people's challenges. Perhaps it would have been useful to discuss some of the challenges others experience in getting content on the hub.”
 - “End users' responses to OKhub initiative (in case someone has used it as a test base or actual usage)”

The IDS GOKH project team met after the event and reflected on the experience. Notes from this are as follows:

GOKH Reflection Session

17th November

Present: Alan Stanley, Kelly Shephard, Helen Bailey, Amy Hall, Paola Brambilla, Henry Roswell, Nason Bimbe, Peter Mason, Natalie Stewart

Facilitator/note-taker: Yaso Kunaratnam

Objectives

- What worked/ didn't work in regards to this specific event
- To help us learn and plan future events and activities
- To inform the workshop report.

After Action Review/ORID Questions

What was supposed to happen?

- Learning - what's happened so far?
- First day: Give partners opportunity to talk about work they've done, and how that fitted together.
- Second day: Where do we go from here? How we want to move forward?
- Third day: Present back to external stakeholders and funders and get their input. Raising profile of programme, internal promotion ('exciteminar'), Evangelia session.

What actually happened?

- Physically seeing the project members - the partners in the room
- Getting to the reality of the project, and the challenges of working
- Better understood the complexities of partner work
- Witnessed partners solve each other's problems
- Getting partners to talk to each other (but more time needed)
- BRIDGE partners got a lot out of it including identifying commonalities; better understanding of each other; planning what they could do with specific partners; hearing feedback on their work; suggestions on how to work better together; understanding better what partners were doing well and seeing good interactions.

Why were there differences?

- Third day, envisaged more donors, looking at donor policies and commitments to open knowledge
- Only DfID there in room, other donors may have joined virtually
- Not sure how to get greater donor participation in future
- More of a learning event than originally envisaged (not sure good or bad thing), maybe because we know how to do that
- Tangible activities and partners
- IDS still seen as centre of the project e.g. will do contracts and everything!
- Consortium model difficult
- IDS still seen as funder
- PALA thought IDS good at leading and speaking to DfID

- Good to be the lead, but can we get funding in future?
- We are yet to figure out benefits of GOKH programme as a whole, as audiences are intermediaries rather than policymakers
- Stories of change might help

What worked?

- Everyone liked event
- Positive impact on Tarah DfID, who liked stories from partners, how it had helped them do what they want to do. She also struggles with articulating tangible benefits
- Most of sessions worked
- Korea MoU signing and photos worked well. They got what they came for
- People did get to talk and learn from each other during day and evening, mixing and getting on even though thematic differences
- Some had met before
- Meal on site good idea
- Nat's organisation was great. Little touches like drink vouchers
- There was a good buzz, not much silence
- Peer assist surgery worked really well, people enjoyed
- Exciteminar chaotic but brilliant, across IDS staff came
- Evangelia session really good, very clear, benefits and risks of open knowledge, maybe more about open data and general. She could do learning paper
- Getting research teams into that was positive, raising profile of what we do, bringing research perspective in, could do more research in this area. Also partner scoping for this
- Questions at Evangelia session, where do we take this? Deepening work in area a good sign

What didn't work?

- Some partners didn't like the food in evaluation forms (good that main criticism)
- Lack of time for 'one to ones', bit fast, lunchtime not good time for e.g. videos
- Felt like ted talks, maybe too fast, quite intense
- Maybe more breaks needed apart from lunch
- Chart, 'parking lot' didn't get to address e.g. continuing to take on new partners, languages
- Could have done a five day event, but couldn't afford. Could have had more breaks
- Hoping to shift partner responsibility, consortium model, not sure we achieved this, some progress but not as far
- Contributor to hub vs consortium member vs advisory group – different roles and responsibilities. Could have articulated different relationships better. Maybe launched in activities too fast
- Inviting to be consortium member beforehand could have been better
- Session worked well, but didn't get as far. Could have done whole day rather than a few hours

- Library session, good discussion, didn't get to test model in great depth. Needed more time. More use cases, can't create mental models without this. Maybe need FAQ. Self-selecting group. People willing to get involved, trying to push model further to be inclusive. Expectation management needed
- Future difficult to frame without talking about funding. Couldn't say we had more funding
- Wanted to keep going but not enough time
- Numbers hard to predict for evening meals, a few participants didn't turn up. Rallied students. Some people may want to do other things in the evening. Restaurant better? Keeping on site may have been good as people were tired from long journeys
- Dealing with per diems requests, invoices, expenses

What would you do differently?

- First night good, but rest of evenings leave free
- Outing would have been good but no budget for this
- IAG members joining, not been very good as didn't have funding. Tim came on Friday, Gracian joined
- Trying to do things at all levels(programmatic, technical, strategic) in three days in limited budget meant we were overstretched
- Reduce scope of what we do in event
- Tim said business model of IDS not great, but what we do is great (could ask him to support in future)
- Involve partners in facilitating session, give ownership, Kemly was great
- Peer assist more planning to prepare, have partners here day before (BRIDGE did) and afterwards
- Partner hosting e.g. IGIDR, but would've been more work for us logistically
- Participating, facilitating, coordinating and taking notes all quite a lot. Maybe get students to take notes and provide incentives
- Have it in the summer, have earlier in the year e.g. June

What were your key insight/s? What can you conclude from this experience?

- Really impressed with partners, worked really well together, really nice and responsive
- Really enjoyed it, best bit of the job, getting to see people, more meaningful
- Dfid's insights positive
- Dfid commissioned portal evaluation – report due back in April.
- Partner feedback - Providing links to partners, deeper understanding of hub, stronger partnerships, commitments to hubs, see what others are doing, peer assists, f2f interaction, understanding openness in different contexts
- Negatives really small

