

## **Conference Report – OpenCon 2014, November 14-18, Washington D.C.**

### Overview:

OpenCon 2014 was a conference bringing together 175 early career researchers and students from across the globe to Washington D.C. With over 1700 applicants from 125 countries, the conference was the first of both its magnitude and its kind. Being focused solely on the three topics of Open Access, Open Education and Open Data, the four day conference was aimed at enhancing individuals' skill set and knowledge in all three areas, while also educating participants on numerous ways of having success in these fields. This was done so through effective keynote speeches, insightful panel discussions, engaging workshops, meetings on Capitol Hill and lastly through simple conversation with fellow OpenCon attendees.

The Simon Fraser Student Society Advocacy Committee saw value in having members apply for the conference, particularly due to the conference's potential in assisting the committee's current BC Open Textbook Campaign. Both the President of our organization, Chardaye Bueckert and I were accepted to attend, and thanks to the approval of \$1000 in funding from the Advocacy Committee for each of us, we were able to attend.

The following report has been broken down into the following sections: Pre-Conference, Day 1, Day 2, Day 3, Day 4, and Concluding Remarks. In the spirit of open, the entire conference was recorded and can be found [here](#). At this link you can also access the three pre-conference videos. As well a more detailed schedule of the conference can be found [here](#).

### Pre-Conference

Prior to attending OpenCon, all attendees were instructed to make a personal profile on the conference's online platform Sched, as well as engage in online dialogue through Google Groups. These conversations included introductions, individual's past experience with 'open,' (including which of the three topics attendees had a background in,) as well as an opportunity for attendees to collaborate on initiatives during October's Open Access Week. Participants were also instructed to watch four 1-hour webcasts moderated by individuals with a background in OpenCon, Open Access, Open Education and Open Data to ensure that all attendees had a basic understanding of each. These webcasts served as important introductions to the three focuses of the conference. I myself had no prior knowledge on the field of Open Data, and as such the 1-hour webcast provided valuable background information of the field.

Day 1: November 14

Our first day comprised of a full day of travel with stops in Seattle, Salt Lake City, Baltimore and finally Washington D.C. An evening reception was scheduled for 7:30pm EST however Chardaye and I did not land in Baltimore until 11:30pm EST. We were then required to take a shuttle to our hotel in D.C. and arrived at 12:45am. Through speaking with other attendees the following morning, we were told that the initial reception served as an opportunity to begin conversation with other attendees primarily. I felt that despite missing this initial reception, both Chardaye and I had no problem engaging with other attendees the next morning.

Day 2: November 15

The first official day of the conference began with buses leaving our hotel at 8:30. Chardaye and I arrived at the American College of Law for registration shortly after, and the conference began at 9:15 with a welcome from the OpenCon organizing committee and major sponsors. Their introductory speeches were a perfect way to begin the formal portion of the conference. Having introduced the idea of *open* as a human rights movement advocating for equality, this immediately sparked my interest as I had never thought of access to information as a human right. Being a post-secondary student in a developed country, many of the barriers of access experienced around the world for the everyday individual are not burdens I often come across. As such, thinking of open in this context inspired me to start thinking of how our current BC Open Textbook Program could be expanded to not only focus on open educational resources (OER's,) but also the field of open access.

The introductory speeches also noted the potential for individuals to make a name for themselves in pursuing *open* publishing as this movement is so new. Being a conference focused on early career researchers, all Masters, PhD and Post-Doc students in attendance have an amazing opportunity to publish open and end the reign of the publishing giants. Being an undergraduate student however, publishing open's applicability is less so, however I did begin to think of publishing the Society of Arts and Social Sciences journal as open source, (while I have since introduced the idea to SASS' Academic Committee, the logistics of doing such is still being reviewed.) Overall the conference's introduction focused on the need to foster engagement, disseminate information and increased transparency in the researching and publishing fields.

The opening keynote speech was titled *The Current State of Open* and featured Patrick Brown, and an ex-Stanford professor who also happens to be one of the co-founders of the Public

Library of Science (PLOS). Focusing primarily on Open Access, Pat spoke on the issues found within the science community regarding both research and publishing, especially for individuals lacking credentials or connections with influential institutions. He touched on his frustrations with publishers regarding the ownership of his research. As a young scholar, Pat published in a few of the largest and most influential scientific journals within his field. In doing so, he gave up all rights to the distribution of his findings and was limited to personal use of his research as he had signed away ownership. Thus, Pat's speech focused on the need for reform within this broken system which emphasized once again, the opportunity young researchers have to make progressive change. He also emphasized a few takeaways: do not take *no* as an answer, be entrepreneurial and find allies in the quest towards *open*. Further, he noted the importance of being confident when going up against strong opposition and shared a funny and bold story about himself and his colleagues at Stanford which led to the formation of PLoS. His lasting words advised early career researchers was to be disruptive, have swagger and use what he called the 'charm offensive.'

This was followed by the first Panel discussion titled *The Current State of Open*. The first speaker, Heather Joseph, the Executive Director of SPARC (the Scholarly Publishing and Academic Resources Coalition) focused primarily on 'setting the default to open.' As a United States based organization, SPARC is committed to increasing the amount of Open Access support and funding available in research institutions across the country. Since 2004, SPARC has advocated alongside US educational institutions for increased funding, which blossomed from a few thousand dollars to over 2.2 million dollars in US funding. SPARC has seen success at both the state and federal level, including the State of California passing AB-609 calling for all state-funded research in the department of public health to be published open access (for more information click [here](#).) Heather's talk again touched on the broken system which currently exists, and provided statistics of how the research community is beginning to recognize the importance of publishing open source at all levels of government.

Another notable speaker during this panel was Nicole Allen, the Director of Open Education at SPARC. Nicole's talk focused on Open Education and more specifically the advantages of Open Educational Resources (OER's,) a topic highly relevant to our current campaign. With the capacity for technology to reduce the barriers associated with traditional learning materials, Nicole introduced numerous examples in which OER's have had great success. Examples included Rice University's OpenStax College, Open Textbook library partners such as the University of Minnesota and BC Campus, as well as MIT Open Courseware. While Nicole did mention the various barriers which must be overcome, including a lack of awareness, availability and credibility, there is a clear necessity for early career researchers and students

to drive this movement forward. Nicole also stressed the importance of institutions recognizing the advantages of pursuing open access. Primarily the enhanced reputation of the institution both within the research community and beyond is significant as greater access can lead to greater impact. From a student perspective, Nicole mentioned an impactful statement, “At the end of the day, students cannot learn from materials they do not have access to.” Thus, in terms of our current campaign at SFU, we must not let up on efforts to save students money and enhance their educational experience.

The second Panel of the conference was titled *Innovative Publishing Models*. This panel (while less relevant to the BC Open Textbook campaign) provided valuable insight into ways in which open source publishing has been successful around the world. We were provided with examples such as Redalyc from Latin America, PeerJ which is largely North American focused as well as the Open Library of Humanities from the United Kingdom. I took a particular interest in the Open Library of Humanities as it was the conference’s first mention of non-science based publishing. This publisher is slowly making waves throughout the humanities community and has garnered interest from institutions such as Cambridge, Oxford and Harvard.

The third Panel of the day was focused on the *Impact of Open*. With a relatively self-explanatory title, Daniel Demarte from Tidewater Community College spoke about the institutions Z Degree program. Beginning his presentation with hard hitting numerical data such as the 812% increase in textbook costs since 1978, Tidewater’s Z Degree program exists as North America’s first zero-textbook-cost associate degree program which solely uses OER’s. Participants within this degree are expected to save \$1200 per year in textbook costs, have a reduced drop-out rate, and enjoy 100% access to all materials throughout their entire degree. Therefore through the use of OER’s, more students are making it past the finish line. For more information regarding this degree, click [here](#). Another presenter who spoke on their experiences with utilizing open materials was Jack Andraka, who at the age of 15 established an early ovarian, pancreatic and lung cancer detecting device which has had 100% accuracy in preliminary tests. Jack argued that 5.5 billion people live in knowledge poverty with only 0.008% of the world having access to published scientific findings. Therefore through open source publishing, technologies like the one he has produced can become much more common if the ‘knowledge aristocracy’ ceases to exist. A video of Jack’s Ted talk can be found [here](#). Overall, through this panel it became clear that we have a broken system. Thus a need for a culture shift exists whereby the younger generations must act and voice their concerns.

Day 3: November 16

The second official day of the conference also took place at the American College of Law. Beginning with a keynote speech from Audrey Watters, the focus of this speech was centered on the concept of 'openwashing,' which is when something has the appearance of being open-source and open-licensing for marketing purposes while continuing previous proprietary practices. Examples include attempts such as Open Class Pearson, Blackboard and the Open Education Alliance. Therefore Audrey's speech focused on addressing that one cannot rely on the word open for results; capacity and agency must also be built in order for open to truly exist in practice.

The next keynote speech of the day was from a post-doctoral researcher, Erin C. McKiernan. Her talk was focused on being open as an early career researcher. Because I am still an undergraduate student, Erin's speech was not incredibly relevant however it did provide valuable insight into the advantages of publishing open source early in your career, (which is applicable for many of SFU's sessional lecturers whose participation is sought in assisting the BC Open Textbook Campaign.) Erin spoke on the personal pledge she made to be open at the very beginning of her career. She stated, "If I am going to 'make it' in science, it has to be on terms I can live with." As such, she avoided losing her rights to a big publisher and in turn undertook the risks associated in publishing open source. The remainder of her talk addressed these myths associated with publishing open source. In terms of visibility, there is increasing evidence that open access journals get more visibility and citations, the same can be said for open data as well. The next was that there are numerous open access journals which fall into the moderate-high impact bracket. Thus, as an early career researcher, publishing open source also permits a high impact factor. In terms of future opportunities (employment, grants and tenure,) progress has been made to support those who do publish open access. The San Francisco Declaration on Research Assessment encompasses 500 organizations committed to not evaluating research based on the journal the work was published in, rather evaluating based on the quality of the work. Another perceived risk is the loss of rights in publishing open source, as all research is duplicable and openly accessible to all with access to the internet. However, Erin touched on numerous documents which can protect researchers' rights to their findings. Overall Erin's speech was focused on access, fairness and efficiency to accessing information.

The fourth panel of the conference was focused on *Successful student and ECR-led events and projects*. The Open Access Button was introduced first from Georgina Taylor, a medical student from the University of Tasmania. Having recognized the barrier to both learning and education paywalls pose, the button serves as a downloadable application one uses once a

pay-wall is hit during research. The button then notifies the author of your interest in accessing the material while also searching the web for the article as well as any other relevant articles which may also assist your research. Being a solely online resource, the button has an extensive global reach and is applicable for students and researchers across all disciplines. The Open Access Button is one in which myself and Chardaye are interested in bringing to SFU through our library computers.

The next speaker of the panel was Meredith Niles a postdoctoral researcher from Harvard University. Her talk was one of my favourite of the conference as it was centered on the capacity of students in advocacy efforts. Speaking based on personal experiences, Meredith talked about the successes she had as President of the National Association of Graduate-Professional Students. Representing over six-hundred-thousand students at over 100 American universities, their lobby efforts at both the federal and state level have brought ample media attention to the issues of open access, open education and open data which has resulted in a greater network of allies across the country. Meredith's advice was straightforward, be bold, make your request clear, know your allies, be ready for opposition, be persistent and be ready to make compromise.

Another notable speaker in this panel discussion was Ethan Semack, a representative from the United States Public Interest Research Group (US PIRG). With one of their aims being to make college more affordable, Ethan's talk focused mainly on the expanding use of open textbooks across the United States and the current status of the publishing companies. One idea I would like to bring to SFU that Ethan mentioned was a Textbook Graveyard. Essentially any textbook which is outdated and no longer the edition used for that class would be donated to a public area; over the first two weeks of class, this pile would continue to grow. Ethan also spoke on effective social media campaigns that have worked in the United States, such as the #textbookbroke campaign in which students tweeted to policy makers and post-secondary administration about the insane amount of money spent on course materials. On campuses, this could result in new institutional policies that support open textbooks over traditional ones. Another outcome could be some start-up capital in which institutions invest in textbooks through the library, making the material free for students. Overall, students do not have to be extremely educated in policy making to spark change. But because students are the face and voice of the problem, we can serve as a catalyst to educate our fellow students on the issues and apply pressure to our institutions. It then becomes the responsibility of the university to reach out to others more experienced in the latter stages of the process. Ethan mentioned that the University of Maryland has had success in creating OER policy.

An insightful question and answer period followed this panel. During this period, it was agreed by all panelists that getting your audience to truly understand the issue at hand is essential for the success of policies centered on open. Therefore, engaging the right people at the right time is key, including institutional resources such as the library (a party which we never thought to engage with prior to attending OpenCon.) In terms of pushing legislation forward at both the state and federal level, Meredith mentioned that open access is a very bipartisan issue. Therefore to garner greater success, it is important to ensure that the content one proposes is relevant to the decision makers. Open access is not very difficult to sell as it ensures greater transparency and efficiency, especially for research funded by the government. The final question put forward was incredibly insightful for our current campaign, how do you sustain advocacy efforts when leaders move on? Relating back to the idea of addressing your allies, it is important to have diversity among your groups (including age, field of study, etc.) Another idea is to build a mentorship program or training regimen for future leaders.

A workshop followed this panel discussion. Chardaye and myself thought it would be best to attend different workshops, as such I went to *Community Building and Advocacy with the Open Access Button*. At this workshop, we covered the very basics of advocacy, and the benefits associated with the Button. Having had past experience with advocacy efforts, I felt as though this workshop was too introductory. However it did serve as a valuable opportunity to connect with fellow Canadian students interested in developing an 'Open Canada' platform. As well, I was able to connect with David Carroll, one of the three founders of the button (and my current point of contact regarding its implementation at SFU.)

#### Day 4: November 17

The fourth day of the conference was by far the most interesting. With all of our meetings taking place on Capitol Hill, we began the day with an Advocacy Training Overview which took place at the Hart Senate Building.<sup>1</sup> This brief session was followed by our final panel discussion of the conference, *Being a Successful Advocate*. We also received a quick talk from Amy Rosenbaum, who holds a position in the Executive Office of the President. This session was followed by advocacy practice with a diverse group of OpenCon attendees, prior to our first meeting with Senator Barbara Boxer's Senior Staffperson. The meeting itself took place afterwards where my group pitched the the value of open to the staffer. Due to our groups diversity, we were able to draw on examples of successful legislation and advocacy efforts

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<sup>1</sup> I unfortunately misplaced my notebook which had detailed notes from this final day of the conference, as such a synopsis of the day will be taken strictly from memory. My apologies

across our differing home governments and institutions. Overall this served as our first opportunity to reflect on what the conference taught us overall. These meetings took place across Capitol Hill, in both Democrat and Republican Congressional Representatives' offices.

My second meeting of the day was with other Canadian OpenCon attendees and took place at the Canadian Embassy. While our meeting was organized with speaking points and a series of prepared questions, Niall Cronin was unavailable to meet with us as he was called into an emergency meeting regarding the Keystone XL Pipeline (which failed to pass in Senate the following day.) Instead however we did receive a tour of the Embassy. Since our meeting never took place I have made several attempts to reach out to Niall, however have not received a response to date.

### Conclusion

Prior to attending OpenCon 2014, my views on the current advocacy initiative engaging with the BC Open Textbook program was solely focused on the high cost of course materials. However, OpenCon served as an invaluable opportunity to enhance my knowledge on all areas of open. The conference served as an inspiring and awe shocking weekend, revealing the true potential students can play in influencing their surroundings. As Heather Joseph stated so eloquently, "We're not the leaders of the future generation, were the leaders of the now." Therefore it's time to assemble the masses from coast to coast, meet with our elected representatives, and ensure that open is a priority for everyone.

Open access can be seen as one of the civil rights issues of our generation. The internet has had profound effects over the reach of access we have to information. It's time access to education no longer be restricted to those in academia. It is a human right to have access to education, and as such I look forward to collaborating with the newly established OpenCon 2014 Alumni, the OpenCon Organizing Committee, Scholarly Publishing Academic Resources Coalition (SPARC,) the Right to Research Coalition (R2RC,) and the Open Access Button team in future advocacy projects.

From the bountiful amount of information received at OpenCon, I am excited to say that we intend on bringing numerous ideas back to Simon Fraser, including all those previously mentioned in this report. Overall OpenCon served as an incredibly inspiring, demanding and overall amazing conference. I am incredibly thankful for not only being accepted as a student only in the midst of completing his Undergraduate Degree, but also being funded by the Simon Fraser Student Society Advocacy Committee.



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