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Outside-In: Entangled Openness as Subversion Influencing Emergent Change

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Abstract
Those of us in the open education field often talk about how open education expands access, supports knowledge sharing, and potentially enhances the quality of education. We also critique open education for sometimes reproducing inequalities despite promising to promote social justice. But what about the ways in which *openness* removes/destroys barriers within us? In what ways does openness empower us from the outside-in? When does openness influence critical change and when might it fail to do so? In this opinion piece, I will explore some of the things openness makes possible that are often not possible within the walls of institutions, and which can end up challenging and subverting injustice by focusing on some key principles within the practice of "Virtually Connecting," and I will explore a notion of *entangled openness* whereby open practices require a complex interplay between open attitudes, social justice praxis, and digital literacies within a team.

Keywords: open educational practices, open pedagogy, social justice, intentionally equitable hospitality, virtually connecting, entangled openness

Why Openness Matters to Me

Openness has been fundamental to my career development and success, starting from back when I was a PhD student, working during political unrest in Egypt with a toddler at home and my supervisor in the UK. I was intellectually isolated from other education PhD students in the world, and even from my own supervisor, really, and finding online networks of other PhD students to support me kept me going and helped me push through that last socially isolated year. I learned to ask questions and to also support others. This was a lightbulb moment for me, that social networks are not just for connecting with already-established friends, nor were they just for broadcasting to the world "hey, I just published this thing," or just listening and consuming other people's content. If you make time to cultivate a Personal Learning Network (PLN) (Siemens, 2005) of individuals you can learn with and from, you have landed on a pot of gold that keeps on growing the more you add to it, and you can draw from it almost infinitely, because the 100 people you are connected to are connected to 100 others, and so on. My PhD experiences helped me understand what connectivism and connected learning meant (even before I fully understood those terms) and it is the center of what I consider to be Open Educational Practices (OEP).

Blogging and building a PLN, applying OEP outside my institution have helped me grow as an educator and educational developer. It has helped me experiment with my ideas in a safer space: paradoxically, this more public and open space was safer for me than my own institutional environment. Eventually, it also helped me serve my own institution better: outside-in. And, I realized, I could keep being useful to others elsewhere in the world along the way.

As I write this piece, I invite you to annotate it via *Hypothes.is* and insert your own stories and interweave them with mine. As I write about elements that support critical change and entangled openness, as I give my own examples, please think along with me, leave an annotation, write your own blogpost, help expand the pool of examples around each theme, and bring your own critical lens on the ideas I'm sharing here. Respond to other people's responses by listening carefully and non-judgmentally, to keep this a safe space for everyone, and imagine facing the person and making eye contact when you respond to them. I have found that imagining eye contact helps me articulate my responses to others more clearly and more humanly. Are you ready? Let's go!

Emergent Strategy & Critical Change

I've often used metaphors in my thinking and writing, and especially metaphors from nature. It comes easily to me, and the good people of *Twitter* recently read a blogpost of mine where I used viruses as a metaphor for trying to work on "change from the inside" (Bali, 2022), where I gave the examples of viruses and how they replicate and can cause disruption from the inside– but with a key factor being that they replicated in order to do so: they needed community in order to cause change from the inside. *Twitter* colleagues suggested I explore biomimicry and read adrienne maree brown[1]'s (2017) book *Emergent Strategy: Shaping Change, Changing Worlds*, and I've been hooked ever since. It has been around two months, and her book is central to this piece I'm writing.

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[1] The author adrienne maree brown intentionally does not capitalize the letters of her name because capitalization "stratifies and commodifies us," as explained in the [blog post, "precisely irresistible: in conversation with Angela Davis and adrienne maree brown."](#)

So many educators work within broken or problematic systems. Higher education, academia as a whole, is so flawed, so full of processes and structures that reproduce inequality, and yet "it is healing behavior, to look at something so broken and see the possibility and wholeness in it" (brown, 2017, p. 21). I am sure that many of us who are in this space, caring about our students, caring about making a difference in the world, are staying the course because we have hope that we can make a difference. I have also been touched by this quote from Czerniewicz et al. (2020), a collection of South African academics and academic developers, writing during the COVID-19 pandemic:

> we are still hopeful, we cling to hope, although we know that this hope is fragile. It is also an angry hope, because we, as with many of our colleagues, are at the forefront of this pandemic and are dealing daily with the impact of the glaring inequalities our society and our institutions are steeped in. Hope sometimes feels wrong, in particular when we feel we are supporting a broken system to survive with our feeble attempts at saving the unsavable. Hope feels torn, because we are uncertain of what is right and what is wrong. (Czerniewicz et al., 2020, p. 964).

What is Critical Change?

I decided not to look the term "critical change" up, because when I accepted the keynote theme for the OTESSA22 conference and wrote my title and abstract, I didn't look it up. The phrase already meant something to me. I'm writing this article ahead of my keynote, and for me, critical change is a change that is critical in the critical pedagogy sense (Freire, 1970). It is a change in orientation towards more social justice, a change that is systemic and not merely on the surface. I think that sometimes we take action or create something, like work on a new gender equity policy, and we think it's going to create systemic change towards social justice, and then it doesn't. It has limitations, and the way we've done it does not address those limitations. On the other hand, I believe that sometimes we're trying to do something small, like teach something differently one day, and the small thing leads to a larger, more systemic change. Combinations of lots of small things, ripples, can lead up to one large wave of change. Among the principles of emergent strategy is "small is good. Small is all. (the large is a reflection of the small)" (brown, 2017, p. 24), and movements that envision social change practice the change they want to see in the world in small ways, "the whole is the mirror of the parts" (brown, 2017, p. 15).

What do you think of this interpretation of critical change? Feel free to insert your own definitions or understandings from experience, or more formal definitions of critical change that resonate with you. It's too late to change this piece of writing after it has been published, but not too late to change my mind, or influence readers of this piece.

Also, I want to say that I was initially planning to tell lots of small stories, but when I started writing, it kind of flowed into one large story. I won't apologize for this, I think, but I promise I have other stories to share in future. If you share a really good story in an annotation, I'd be happy to include yours in future work I do! Citing you, of course.

Intentional Adaptation as a Response to Constant Change

I don't know if readers know the story of [Virtually Connecting](). It is a grassroots movement that challenges gatekeeping at academic conferences by enhancing virtual participation in conversations at in-person conferences, though that's not exactly how we framed it at first. I co-

founded it with Rebecca J. Hogue, and it started out really selfishly. My dilemma in 2015 was that I wanted to be at a particular conference (in which I was an organizing committee member, and where I was presenting five separate times with different friends–yes, I said friends, my collaborators whom I'd never met in person are people I consider friends) and I couldn't go. It was difficult for me to leave my young child at the time, and financially complicated to take her as I would need to take a caregiver as well (I had tried and failed to get the conference to organize daycare for her). What I was longing for, what I felt I'd be missing, was not the conference presentations. That was doable. I was missing the hallway conversations you have with people over coffee or lunch or when you bump into them on your way from one place to another. I was missing the random, informal social conversations, not the formal conversations. And so, Rebecca offered to be my *buddy* and connect me with people via her own device, and we called that first experiment #et4buddy. We realized that *Google Hangouts* was the best option at the time, and we decided to announce these conversations to others on *Twitter* if they wanted to join in. We held several open conversations at the time, and people who joined both onsite and virtually enjoyed them–and we live streamed and recorded them so others could watch, too.

After that first conference, we surveyed people for feedback, and people in our community asked us how we would keep doing it, how we would scale it, and we realized that you cannot scale Maha/Rebecca, but you could expand the group of volunteers doing it. This is how Virtually Connecting was born and started growing. We quickly learned that you did not need Maha and Rebecca at every conversation, and we also learned that these conversation did not just *expand access* to conferences for people who could not make it–sure, this was a social justice goal, expanding access to global South scholars, parents of young children, graduate students, contingent and early career academics, people with disabilities or visa issues preventing travel, etc., but we were going beyond that and actually challenging the academic gatekeeping at conferences, by offering something not previously done at conferences.

Two elements of emergent strategy are key to the success of Virtually Connecting: "less prep, more presence" (brown, 2017, p. 45) in the sense that even though we prepared to make these sessions happen, the focus was on preparing an environment that would allow a conversation to flourish that was equitable and meaningful for participants. The facilitators' presence was essential. We had two facilitators: a virtual buddy responsible for virtual folks (a maximum of nine, because of *Google Hangouts* limitations) and an onsite buddy, responsible for the guests at the conference, usually somewhere between two and five, and both facilitators adapted as needed to help make the conversation happen. Part of the facilitation role is to counter the power difference between a well-known established keynote speaker onsite having a conversation with a graduate student joining virtually, for example. We called this "Intentionally Equitable Hospitality" (IEH) (Bali et al., 2019), recognizing the role of facilitator as host, and the importance of intention when our goal is to promote equity. We continually used "intentional adaptation" (brown, 2017, p. 21) in order to achieve our vision.

One of the key elements of Virtually Connecting, the presence of an onsite and virtual buddy is so important, because it is a kind of decentralization/distribution of care, rather than a scaling of care. In brown's book (2017), I learned that a flock of a large number of birds is not authoritatively led by one bird at the beginning, but rather that each bird is responsible for paying attention to seven neighboring others, and they pay attention to and adapt to each other,

so that overall, the adaptation is distributed and they all move as one–but there is not one leader responsible for a huge flock–each individual is responsible for seven others, and has seven others responsible for it. Similarly, in Virtually Connecting, we had different groups of people responsible for working as teams at different conferences, and a different person focusing on onsite folks than the person responsible for virtual folks at each session. All of this enabled a kind of distributed or decentralized care, and this is the main prep(aration) we needed in order to ensure each facilitator could be *more present* in each session: sessions where conversations were spontaneous and not prepared in advance. Less prep, more presence.

It makes me sad that few conferences have been able to replicate this model of caring and equitable conversation during the pandemic when everything went online and everyone needed it the most. However, I think there are two key ways that my colleagues and I used what we learned and IEH to make a difference, make critical change in the world, beyond those small hybrid conference conversations.

First and most importantly, Mia Zamora, Autumn Caines and I collaborated with [OneHE via Equity Unbound](#) to co-create and co-curate a collection of community-building resources for teaching online (Bali, Caines & Zamora, n.d.) collaborating with many others around the world. This Open Educational Resource (OER) emerged when we noticed there was a need for it. People in many parts of the world were going to teach fully online for the first time, they had never done it before, and they thought building community online was not possible. We knew it was possible, most of us who had been learning and teaching and engaging online for years had done it and we knew it was possible. So much online learning had been asynchronous before 2020, but Virtually Connecting facilitation was mostly synchronous, and we knew how to do it well. We needed to help others know and see that it was possible, because it was so urgent to build community and connection in these times of trauma and social isolation. This resonates with what brown mentions in her (2021) book *Holding Change.* Among the new principles of emergent strategy (so cool that emergent strategy would have emergent principles, right?) are: "Transform yourself to transform the world" (p. 19); "what we practice is what we are" (p. 20); and "name what is, make more possible" (p. 20). What these open resources do is that they model and "practice" IEH in a way that helps others name the gap in community building and helps them make it possible–helps them change the way they teach in order to create community in their classes in better ways. A central element here is "if you want to change what *is* possible in the room, change what *you believe* is possible" (brown, 2021, p. 20). And this enabled people to do this, to believe community-building online was possible, even when they did not have resources at their institution to help them learn how to do it. This OER responded to systemic inequality we noticed: many educators around the world did not have support staff to help them move their courses to fully online, and the support staff that existed within institutions were overloaded and burning out. This resource has been beneficial to both educators and the educational developers who support them. Contributors from Egypt, US, Kenya, Australia, Lebanon, Austria, Italy, and the UK provided diverse perspectives on how a community-building activity could be received in different contexts, such that adaptations became central to the description of these resources–reminding people of the importance of *intentional adaptation* by modeling it.

One of the interesting metaphors brown (2021) uses is "be like water" (p. 17) and this has so many different interpretations–when you hear "be like water" what do you think? My first

impression was "go with the flow" but she goes beyond that. Well, first, she quotes Bruce Lee and it's a good reminder about how water can both quench thirst and drown us. He talks about how water just flows and becomes the shape of its container, so smoothly, without resistance. And I think that perhaps I've misunderstood the metaphor, because adaptation in this way means that if the container is oppressive, you allow yourself to work within it? So my idea of intentional adaptation would mean that we work to shape the containers so that they help us move towards our vision.

For example, in my own practice at my institution, I both modeled IEH in the ways I gave workshops, and I heard feedback from our faculty that they learned by my approach to facilitation just by watching. This is important–I would not have had this skill had I not done so many Virtually Connecting sessions, and other open conversations before it. But more importantly, when my institution started doing its own version of low-resource "Hyflex" teaching, calling it "dual delivery," my experience with Virtually Connecting better enabled me to consult with our faculty on how best to engage students who were virtual and others in-person simultaneously. The key, I believed, was to have a Teaching Assistant (TA) to act as "advocate for virtual participants." That way, there were two people responsible for paying attention and to be *present*–otherwise, many faculty would not be able to equitably focus on both groups of students–or they would manage it but feel really exhausted. I didn't realize how revolutionary this recommendation was until I presented it at another institution and all the faculty there said "hey, how come we don't have any TAs here?" I hope they did something about it later! At my own institution, some faculty have TAs and some don't, and I am still advocating for making sure anyone who teaches in these classrooms can have some kind of assistance of some kind. Volunteer students (on rotation) was an immediate suggestion, also as a way to promote reciprocity among students (like the birds responsible for the seven around them in the flock), but more likely, some kind of "dual delivery" paid assistant is a better solution.

You know, this is all really a long-winded story to talk about the main thing I think these things have taught me: investing in humans rather than machines and platforms is the most important element of making any digital experience work. And because humans are not machines or platforms, we should be nurturing humans, rather than "investing" in them. Virtually Connecting used free technology and volunteer people who cared, and the conversations worked with medium quality devices and mics, but the conversations were rich because of the IEH practiced by the people amongst the volunteer community and with the participants.

We did not transform conferences. We continued to work within conferences, which themselves are academic gatekeepers accessible only to the more privileged. Yet we challenged what they did and created our own parallel experiences where we could invite more marginalized individuals and have critical conversations at conferences that tended to promote less critical discussion.

If you could change conferences, though, what would you want them to be instead?

With Virtually Connecting, we expanded access, yes, but not so that people in the global South could hear the knowledge coming from the North/West, but so that people who could not be at a conference could be part of the conversation, not just at that conference, but across conferences, so that people who barely ever attended a conference could have a voice and

influence, connecting from their own home or office. But we were clear on our limitations: we conversed in English and only occasionally could host with a different language; we used the internet and *Google* and *YouTube*, and some people did not have bandwidth to stream/join a video conference, some countries blocked *Google*/*YouTube*. So, although we were able to break down some barriers and empower some individuals, we did not do everything for everyone. The key thing was, though, that the most marginalized of our community members and volunteer facilitators often suggested some of the best changes we made to our processes.

The Equity Unbound/OneHE resources were created by just sitting in our homes in front of our screens with our regular camera and mic and occasional interruption by children that we welcomed and included. We did not edit the videos. We did not perfect them. They were useful as they were, a representation of what it might mean for any teacher who might be teaching from their living room during the pandemic. We did not need fancy equipment to build community. We didn't have resources at my own institution to create these resources locally– but I worked with people from all over the world–from Kenya to Italy to Australia to Lebanon and US and Egypt, to create them. And then people at my institution used them–as did many other people around the world. And new people contributed to them, not just the people I had invited at first. This was outside-in change.

Is all this really a critical change? I think so, on several levels, but it is always an iterative process of trying to work towards social justice, to recognize there will always be oppressions to redress and to keep working with people to redress them. Did it cause systemic change? On some level, because individuals who did not have access to academic development support, and academic developers overwhelmed by the amount of support they had to suddenly give, all could benefit from and adapt these resources. But this was not change on the largest scale. Perhaps starting small and growing that way is how change can happen on a larger scale.

Entangled Openness

Another thing I've been thinking about lately is what can really make open educational practices work to serve social justice goals? Why do so many people who originally intend to use openness for social justice risk falling short of their goals? It may be because they are lacking depth of knowledge of a contextual, multidimensional and multi-layered notion of social justice (see Bali, Cronin & Jhangiani, 2020; Lambert, 2019, Hodgkinson-Williams & Trotter, 2018). Or the failure may be due to lack of digital literacies needed for making openness as technically open as possible for as many groups as possible. Examples include: materials that are created and shared for free, but are not culturally diverse; or materials that are offered up for free adaptation, but in formats not accessible or easily convertible to formats accessible to people with visual impairment; or projects meant to support communities without involving community members themselves. I've come up with a notion of "entangled openness," where teams of people who work on open educational projects share the following:

1. An attitude towards openness, something similar to what Bali and Koseoglu (2016) named *Self as OER*
2. An understanding of the complexity of the praxis of social justice (perhaps as manifested in IEH–such that we are intentionally equitable at the pre-design, design, and facilitation stages, as well as in building inclusive community beyond the moment) (Bali & Zamora, 2022)

3. Digital literacies, i.e., critically knowing the why, when and for whom we use technology and not just the what and how (Bali, 2016), not necessarily having all of the skills, but recognizing what is possible in order to make our vision come true.

I used the term entanglement inspired by the work of Tim Fawns (2021, 2022) on "entangled pedagogy" which challenges the notion of the binary thinking that either technology drives pedagogy or pedagogy drives technology, but rather suggests that a good teacher uses their knowledge of both pedagogy and technology together to make something that is more than a sequential use of them would produce–something that is more complex, dynamic, and nuanced, driven by context and values. In entangled openness, I suggest that having an attitude of orientation towards openness (also knowing when *not* to be open), as well as a well-formed praxis of social justice, and not just a theoretical understanding of it, are needed together with digital literacies to make an open educational practice achieve its goals. With Virtually Connecting, every volunteer, and possibly many of the participants in sessions, had this willingness to be open; many of the volunteers came in with social justice goals and learned to better practice them in the planning and in the moment; and they had to also have the digital literacies to use the technology to make this all work to the fullest extent possible to promote social justice (perhaps the digital literacies for a few organizers had to be more advanced than everyone else's). In the OneHE resources, there was an openness orientation where everyone who contributed resources was willing to share their own activities to others, to offer adaptations to work for different contexts, and we had within the team enough digital literacies to produce the resources quickly and effectively.

If someone has an openness orientation but not a social justice praxis, they may create open educational resources that unintentionally reproduce inequality; if they don't have digital literacies, they may create projects that aren't easy for people to use and adapt. If someone has the social justice orientation but not the openness, they may keep doing great work but not make it accessible to others or offer it up on a license that allows others to adapt the work. It is the combination of all three of these, working together and not in a particular sequence, that allows an open project to thrive. You need a team with entangled openness working together. Some may be stronger on the digital literacies side or the social justice praxis side, but they all need to connect on these three points, and to use them iteratively in context to promote their values.

Invitation to Share

In research I am currently conducting with Daniela Gachago and Nicola Pallitt, we learned that many people in staff/educational development positions who care about social justice are nourished by spaces outside their institution, and the power they wield/have outside their institutions can sometimes eventually result in change within their institutions.

As you were reading this, what kind of critical changes, big or small, have you worked towards yourself, or seen happen around you? Do these critical changes reflect some of the elements of emergent strategy? Do they reflect some other approach? Share with me by commenting on this text via annotations or some other way, and I may cite you in future work–with attribution, of course!

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