



FROM
OURS TO
EVERYONE'S
LESSONS FROM SHINE'S
OPEN-SOURCING
JOURNEY

ABOUT SHINE LITERACY'S **SUNSET**

After 23 years of operation, **Shine Literacy made the bold decision to close, or “sunset”, in March 2024.** The literacy nonprofit landscape had changed significantly since its launch, and the Founder-Director and Board realised that sustaining Shine as a non-profit organisation was not the only or best way for its model, resources and learnings to make a difference in helping young children learn to read.

Shine embarked on a one-year managed transition of its activities to its social franchise partners, community-based organisations known as “Shine Chapters”. It built their capacity, deepened their connection as a network, and donated the bulk of its reserves to these partners so the work could continue.

It also committed to open sourcing its model and materials so they could be used by schools, community-based organisations and committed volunteers in South Africa to help struggling readers become confident readers.

This learning brief shares what Shine learned in the process of open sourcing, and offers a framework for how other organisations might go about open sourcing their own resources.

This learning brief is part of the **SHINING ON** series which captures lessons from Shine's sunset. All briefs can be accessed at www.shineliteracy.org.za.





OVERVIEW

Shine Literacy Hour is a programme that helps hesitant and struggling readers become confident readers. It was developed by Shine Literacy, a nonprofit organisation (NPO) that launched its work in 2000. Initially, Shine ran the programme directly at its own centres. In 2011, Shine began scaling up with a social franchise model: it licensed its programme to community-based organisations and offered training, materials and support.

In 2023, Shine decided to open source its materials. This learning brief shares Shine's journey from social franchising to open sourcing. It unpacks why Shine decided to open source its materials; lays out the key questions Shine had to consider along the way; and offers a framework to help other organisations open source their programme models and materials.

ABOUT SHINE LITERACY HOUR

Shine Literacy Hour is a model that has successfully moved thousands of Grade 2 and 3 children from struggling to confident readers in six months.

It is designed to equip everyday citizens as “reading partners”, and has been successfully used to train unemployed young people, NPO staff, retired professionals and parents.

Shine Literacy Hour is built around four key activities: paired reading, shared reading, have-a-go writing, and a set of scaffolded games that build key skills. Children are screened with a simple assessment, and reading partners provide two hours of support each week to children at risk of falling behind.

BACKGROUND: WHY OPEN SOURCE?

Historically, Shine's flagship programme, Shine Literacy Hour, was a proprietary model that Shine scaled up through social franchising. Shine packaged its model so it could be easily replicated; raised donor funds; and offered partners training, materials and ongoing support. Partners signed a licensing agreement, submitted assessment data, and committed to quality assurance standards.

Shine adopted this approach in 2011 to ensure its work was implemented with a high degree of programme fidelity; to defray costs by harnessing partners' resources; and to ensure the work was led by local actors and solidly rooted in communities.

But the Covid-19 pandemic jolted Shine's thinking. Many South African children lost up to a year of learning due to school closures and fell even further behind in reading. The need and demand for catch-up programmes was greater than ever, yet it was more difficult for NPOs to work in schools.

At the same time, a social franchise became more difficult to fundraise for and deliver. Volunteerism declined during Covid-19, and partners weren't reaching as many children, which reduced funders' return on investment. Quality assurance was more difficult.

Yet in the face of pandemic-related restrictions, Shine's partners also began to adapt the core programme model in ways that still achieved positive results. And over the last decade, more open-source materials for early-grade reading have become widely available in South Africa. These include Funda Wandé's literacy workbooks, teaching guides and anthologies; Molteno's Vula Bula readers; Wordworks' T.I.M.E. home learning packs; the Ulwazi Lwethu African-language storybooks and readers; and Book Dash's extensive story library.

As a result, even before it decided to sunset, Shine had begun to ask:

Do closed resources limit our reach and impact? What would happen if we made our model available to everyone?

Once Shine decided to sunset, the benefits of open sourcing were clear. There are many people and organisations who want to help children learn to read, but don't know where to start. Adapting and sharing Shine's materials as widely as possible would help meet a critical need in the sector, and would allow its legacy to "shine on" even after Shine closed its doors.



HOW TO OPEN-SOURCE: KEY QUESTIONS TO ASK

Shine quickly learned that open sourcing was not as simple as slapping on a Creative Commons license (CC). It embarked on a fact-finding and exploration process, and spoke to 18 people with expertise in open educational resources, online and self-paced learning, digital publishing, web development, and intellectual property and NPO law.

Ultimately, Shine identified and grappled with **eight key questions** on its journey to open source its resources. This section unpacks these questions and offers a framework that other organisations can use to think about open sourcing.

KEY QUESTIONS TO ANSWER WHEN OPEN SOURCING MATERIALS

1. What are your goals?
 2. Which type of license should you use?
 3. Who is your target audience, and how do you design for their needs?
 4. How do you design for unmediated, self-directed use?
 5. Who will hold the copyright?
 6. Where should the materials live?
 7. How will you promote and share your materials?
 8. What will it cost?
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1. WHAT ARE YOUR GOALS?

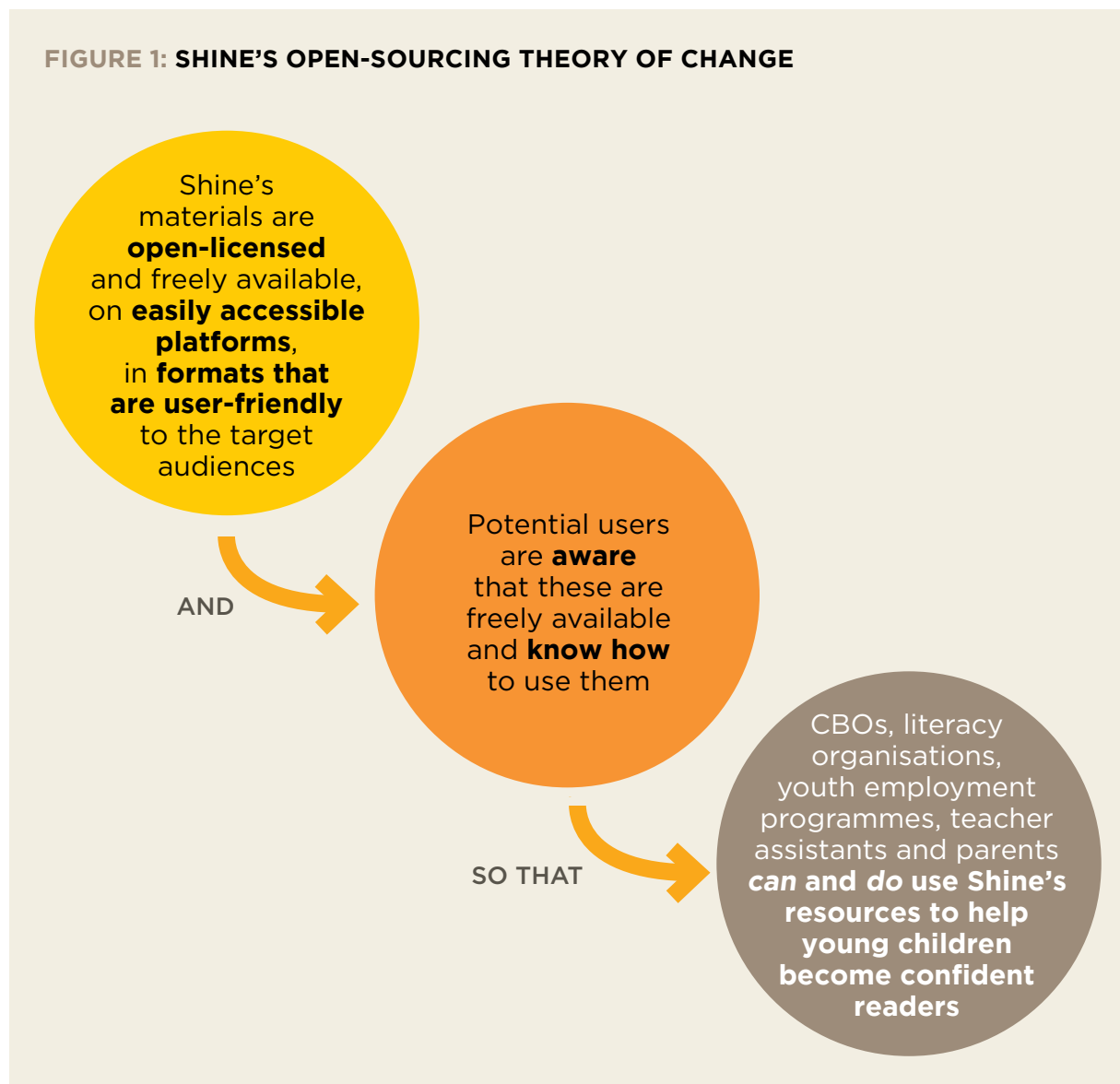
The answer to the question, “What do you hope to achieve by open sourcing your resources?” will be different for each organisation. Possible reasons include:

- To increase use or reach new audiences;
- To cater to less-resourced groups that cannot afford to pay;
- To comply with funder requirements;
- To align to organisational values around collaboration and openness; or
- To assert thought leadership in the sector.

Once Shine decided to sunset, it was clear that it wanted to open source its materials. But to figure out how to do this, and to convince its Board to invest resources in the process, Shine had to be clear about what it believed it could achieve by doing so.

Shine drew up a mini theory of change for its open-sourcing project, which is shown in the graphic below. Platform accessibility, user friendliness and use were priorities for Shine, so it foregrounded these in subsequent decisions.

FIGURE 1: SHINE'S OPEN-SOURCING THEORY OF CHANGE



2. WHICH TYPE OF LICENSE SHOULD YOU USE?

TYPES OF LICENSES








Creative Commons (CC) licenses are a standardised way for individuals and organisations to give the public permission to use their creative work under copyright law. Practically speaking, they signal to the reuser what they are allowed (and not allowed) to do with the licensed work.

There are a range of Creative Commons licenses – and in practice, some can be just as restrictive as commercial licenses. The image below illustrates six different types of Creative Commons licenses, as well as public domain.

All allow the material to be freely copied and reproduced, but include various combinations of the following restrictions:

- **BY: Attribution.** Users must credit the creator.
- **SA: Share Alike.** Adaptations must be shared under the same license terms.
- **NC: Non-Commercial.** Users may not sell the material.
- **ND: No Derivative Works.** Users may not adapt the work.

FIGURE 2: TYPES OF CREATIVE COMMONS LICENSES¹

CREATIVE COMMONS LICENSES	COPY & PUBLISH	ATTRIBUTION REQUIRED	COMMERCIAL USE	MODIFY & ADAPT	CHANGE LICENSE
 PUBLIC DOMAIN	✓	✗	✓	✓	✓
 CC BY	✓	✓	✓	✓	✓
 CC BY-SA	✓	✓	✓	✓	✗
 CC BY-ND	✓	✓	✓	✗	✓
 CC BY-NC	✓	✓	✗	✓	✓
 CC BY-NC-SA	✓	✓	✗	✓	✗
 CC BY-NC-ND	✓	✓	✗	✗	✓



COPY & PUBLISH

You can redistribute (copy, publish, communicate, display, etc)



ATTRIBUTION REQUIRED

You have to attribute the original work



COMMERCIAL USE

You can use the work commercially



MODIFY & ADAPT

You can modify and adapt the original work



CHANGE LICENSE

You can choose license type for your adaptations of the work

¹ Table based on <https://foter.com/blog/how-to-attribute-creative-commons-photos/>

THE FIVE R'S: A FRAMEWORK FOR CHOOSING A LICENSE

There are pros and cons to each type of license, and the jargon can feel confusing. As it consulted with open educational resource (OER) experts, Shine was introduced to the “5 R’s template”, which breaks down five things people might do with open-licensed work: retain, reuse, revise, remix and redistribute. For each, it is helpful to clarify exactly what you want others to be able to do, and not able to do.

FIGURE 3: 5 R'S PLANNING TEMPLATE FOR OPEN LICENSING²

	DEFINITION	What do you want others to be able to do with your resources? What do you not want them to be able to do? Why not? What risks are you trying to mitigate?
RETAIN	make, own, and control copies of the content	
REUSE	use the content in a wide range of ways	
REVISE	adapt, adjust, modify, or alter the content itself	
REMIX	combine the original or revised content with other material to create something new	
REDISTRIBUTE	share copies of the original content, your revisions, or your remixes with others	

In having those conversations, it is helpful to concretely name and explore the risks you are trying to mitigate: Why do you want to prevent certain types of use? What are the worst-case scenarios? How likely are they? Do you have any control over them? Most crucially, **do the potential benefits of restrictions outweigh the benefits of openness?**

In particular, it is important to be realistic about whether a non-commercial restriction makes sense for your organisation. Some nonprofits would like to use their intellectual property to generate income – or are encouraged by funders to do so. But in the education sector, the Department of Basic Education does not have the budget or political appetite to purchase marked-up materials, and reading material provision lags far behind the need. Most schools and NPOs that need materials also have limited budgets.

Regardless of where an organisation lands, the conversations are as important as the answers. Airing questions as a team generates buy-in for an organisation's decision.

DO YOU HAVE OWNERSHIP OVER THE RESOURCES YOU WANT TO OPEN SOURCE?

An organisation can only open source something if it owns the materials. Shine was advised that the default position is that when employees create materials, the copyright in the materials belongs to the organisation; but when a consultant creates materials, the copyright in the materials belongs to the consultant unless ownership was explicitly transferred to the organisation in their contract.

Before commissioning work, NPOs should ensure that consultant contracts explicitly transfer ownership of the intellectual property to the organisation. (It is wise to include this in employee contracts, too!)

² Tool adapted from slides created by Marion Smallbones, 2019 (CC-BY-SA). 5 R's definitions from Wiley, D. and Hilton, J. L. III (2018). 'Defining OER-Enabled Pedagogy', International Review of Research in Open and Distributed Learning 19(4). DOI: 10.19173/irrodl.v19i4.3601.

SHINE'S PROCESS

For Shine, the question of whether to restrict commercial use was interesting to weigh up. Ultimately, when Shine asked, "What are we trying to prevent?", even its "worst-case scenarios" – for example, a large textbook company includes Shine's method in teacher-training textbooks, or an NPO sells Shine materials to parents to generate income – were net-positive for Shine's goal of helping children learn to read.

Shine had also learned through consultation that the more restrictions you place on a product, the less likely people are to use it – in part because they do not understand the CC license system.

Ultimately, Shine agreed to use the same license as Wordworks, the nonprofit organisation to which it transferred copyright (see below). Wordworks uses a CC-BY-NC-SA license (Attribution, Non-Commercial and Share Alike). Since Wordworks sells its materials to the public (at cost, not for profit), it wanted to restrict commercial use and ensure any adaptations used the same license.

However, if Shine had not partnered with Wordworks, it would have chosen a CC-BY license: Creative Commons with Attribution. This is the most open Creative Commons license. Users can copy and publish, modify and adapt, sell, and change the license of the resources, but must always attribute Shine Literacy.

3. WHO IS YOUR **TARGET AUDIENCE**, AND HOW DO YOU DESIGN FOR THEIR NEEDS?

One challenge with open sourcing is the temptation to try to serve all possible audiences, hoping for broad uptake. In practice, the more carefully you design or adapt materials for the specific needs of one or two narrowly-defined audiences, the more likely the resources are to be used.

Shine knew it needed to adapt some of its materials and repackage them in different ways – for example, to convert PDFs to more searchable website text; to develop succinct descriptions of resources to help people identify what they need; or to use generic language like "reading programme" instead of jargon like "Shine Literacy Hour". To make decisions about this, it needed to understand who it was trying to serve.

For Shine, potential audiences included programme coordinators and front-line facilitators at community-based organisations, motivated young people, Shine ex-volunteers, teachers, parents, children, and decision-makers like funders and the Department of Basic Education.

To prioritise these, Shine asked questions including:

- Who was the material originally designed for?
- Who has used the material the most in the past?
- Who might be able to reach the most children?
- Who is currently under-catered for?

Shine identified programme coordinators, ex-volunteers and motivated young people as its priority audiences. Through a series of workshops facilitated by Electric Book Works, it spent time exploring what a positive experience interacting with the materials might look like for these groups – for example, simple and intuitive navigation, a mobile-friendly platform, low data needs – as well as what might turn them away.



4. HOW DO YOU DESIGN FOR UNMEDIATED, SELF-DIRECTED USE?

Adapting materials that were initially designed to be “mediated” (embedded in a programme with human interaction) to be “unmediated” (used independently) may require significant editing, overwriting and streamlining. It is important to think about how materials might be used, and to design (or redesign) them to make this as easy and effective as possible.

Materials that will be “unmediated” – that people are meant to use on their own – need to be:

- **Simple and succinct** – “less is more”
- **More directive and explicit**
- **In bite-sized pieces** that are easy to digest for people with limited time and attention
- **Easy to navigate**, so users can find what is relevant to them very quickly
- **Suitable for a low-data context**, and mobile-friendly
- **Clear about the conditions of license**, so users know what they can and can't do

If you want to allow adaptation, it can also be useful to share **editable** versions.

When it started its open-source journey, Shine put together a list of all the resources it might share. This included:

- **Training materials:** manuals, PowerPoints and videos;
- **Literacy learning materials:** games, alphabet charts and high-frequency word lists;
- **Implementation guidelines:** manuals for running Shine Literacy Hour and setting up a Shine Chapter; and
- **Research:** Shine's Survey of Evidence, a literature review supporting its approach.

For unmediated learning, less is more. After identifying its priority audiences, Shine had to decide which materials were its “North Star” – the most critical content people need to help struggling readers – and where to cut back on complexity or detail.

Shine audited and ranked its materials in order to decide which to open source, and to identify which resources were ready to share as-is and which required more work or adaptation. It decided to prioritise the key methodologies used in Shine Literacy Hour – paired reading, shared reading, have-a-go writing, and games. It also included training resources for its Book Buddies programme, family literacy workshops and teacher assistants, and the operations manual for running a Shine programme.

SELF-PACED ONLINE COURSES: WORTH THE EFFORT?

Some online courses use a Learning Management System (LMS), such as Moodle, that supports self-paced learning. Other online learning resources take a ‘toolkit’ approach, with videos, audio resources, web pages and PDFs that can be accessed as-needed.

Shine considered creating an LMS-based course. However, it learned that very few people finish unmediated self-paced courses: even the best massive open online courses (MOOCs) are lucky to achieve a 3% completion rate. This is higher when online courses are embedded in real human relationships, and people are nudged to complete them.

Ultimately, the cost and effort of creating a Moodle was unlikely to deliver the hoped-for outcomes, and Shine decided to stick with a “toolkit” format.

5. WHO WILL HOLD THE COPYRIGHT?

Even open-sourced materials need and have a copyright holder. **Copyright** is a legal right granted to the creator or owner of an original work. It exists automatically, from the moment of creation, and protects the work against unauthorised use or reproduction. The copyright holder can grant **licenses** to others to use the work under specified conditions.

If an organisation owns the resources, the copyright holder can continue to be the organisation that created the resource. However, if an organisation is closing down, it needs a new copyright holder.

In Shine's case, some materials – those that Shine unequivocally owned – now have their copyright vested in Wordworks. A few materials created by consultants are owned by their individual creators, who have granted Wordworks a license to publish the materials under a Creative Commons license.



6. WHERE SHOULD THE MATERIALS LIVE?

For most organisations, the answer to this question will be, “On our website.” Since Shine was closing, it needed to find a new home for its materials and intellectual property rights.

While building a website would be easy, ensuring it would be maintained over time would be more difficult. Someone would need to renew the domain name, provide server space for content, and troubleshoot when anything went wrong.

As Shine explored potential service providers to maintain its website over time, it found strong synergy with Wordworks, an early language and literacy nonprofit. Wordworks' materials focus on the first eight years of life, and adding Shine materials to its website would allow it to serve a broader population. Wordworks agreed to host Shine's materials as part of its core resource repository, and Shine made a donation to Wordworks so it could upgrade its website into a user-friendly resource hub for the early literacy sector and sustain the resource hub, including Shine's resources, for the long-term.

Shine also built a simple legacy website with information about Shine's history, sunset and learnings (www.shineliteracy.org.za), which Wordworks agreed to maintain.

To simplify maintenance as much as possible, its legacy site is a static website. Static websites show content exactly as it is stored to all users. In contrast, dynamic websites use databases and scripting language to pull content in real-time for each user. Dynamic websites can be easier to build for people who don't know how to code, using platforms like WordPress, but are less stable and more likely to break; they are better suited to websites that will be more actively maintained.

7. HOW WILL YOU PROMOTE AND SHARE YOUR MATERIALS?

When open sourcing materials, it's important to think about a communications and advocacy strategy from the start.

While most NPOs promote their materials in the course of their work, even the most prominent organisations have limited networks and reach. And many time-limited donor-funded projects invest heavily in materials development but do not share these after the project has ended, or do not share them in formats that are useful to prospective users.

For these reasons, it may be useful to publish print-ready resources in multiple places, including open-access resource repositories. While many repositories focus on high school and university textbooks, the Early Learning Resource Network (ELRN - www.earlylearningresourcenetwork.org/) publishes open-licensed, print-ready resources for foundational literacy and numeracy.

Shine's donation to Wordworks included a budget to promote the new resource hub, and Wordworks has previously shared its material on other sites, including the Gauteng Department of Education.

All organisations can benefit from asking questions including:

- Should we share our materials on other platforms, besides our own website?
- If so, is it better to be on as many platforms as possible, or strategically choose platforms that will have the most impact?
- What will our plan be if/when the project ends or our organisation closes down?



8. WHAT WILL IT COST?

If planned from the start, open sourcing materials may not incur significant additional costs. However, when transitioning to open licensing, some costs may need to be budgeted for.

Shine needed to allocate budget to:

- A workshoping process to prioritise and design for target audiences;
- Consulting lawyers around how to correctly transfer ownership to a new organisation.
- Some modest materials adaptation, reformatting and redesign;
- A donation to Wordworks that allowed it to build out its website to host Shine's materials, including planning, web development, staff time and long-term maintenance;
- A workshoping process to clarify technical specifications for the resource hub; and
- Consultant support to drive the project, which fell outside of existing staff capacity.

FIGURE 4: A FRAMEWORK TO PLAN FOR OPEN SOURCING

	QUESTION	CONSIDERATIONS
1	What are your goals?	<p>What do you hope to achieve? For example:</p> <ul style="list-style-type: none"> • Increase use • Reach new audiences (including those who can't afford to pay) • Comply with funder requirements • Align to organisational values • Assert thought leadership
2	Which type of license should you use?	<p>Explore the 5 R's of what people might do with your materials - retain, reuse, revise, remix and redistribute. Ask:</p> <ul style="list-style-type: none"> • What do you want people to be able to do? • What do you not want people to be able to do? • Why not? What risks are you trying to mitigate? • Do the potential benefits of restrictions outweigh the benefits of openness? <p>Decide whether to use any Creative Commons restrictions - NC (non-commercial), SA (share alike), ND (no derivative works) - or to use a more open CC-BY license that requires attribution only.</p> <p>You must own the resources you plan to open source. Ensure ownership was transferred explicitly in any consultant contracts, and sign addenda if necessary.</p>
3	Who is your target audience, and how do you design for their needs?	<p>Ruthlessly prioritise one or two key audiences and design your resources for their needs. Helpful questions to ask include:</p> <ul style="list-style-type: none"> • Who are all the different types of people that might use our materials? • Who was the material originally designed for? • Who has used the material the most in the past? • Who might be able to reach the most children? • Who is currently under-catered for? <p>Once you have chosen a priority group or groups, explore: What would make this user have a positive vs. a negative experience with our materials?</p>
4	How do you design for unmediated, self-directed learning?	<p>Materials for unmediated, self-paced learning need to be:</p> <ul style="list-style-type: none"> • Simple and succinct • More directive and explicit • In bite-sized pieces • Easy to navigate • Suitable for a low-data context • Clear about the conditions of license • Editable, if you want to allow adaptation
5	Who will hold the copyright?	<p>If an organisation is closing down, it needs a new copyright holder. In open source projects, copyright is usually vested with the individual creators, who grant licenses to others to use the materials.</p>
6	Where should the materials live?	<p>Consider whether you want a static or dynamic website.</p> <ul style="list-style-type: none"> • Static websites show content exactly as stored to all users and require less maintenance. • Dynamic websites use databases and scripting to pull content in real time and are more likely to break. <p>If your organisation is closing down, consider who will maintain your website over time and if possible cover their costs.</p>
7	How will you promote and share your materials?	<p>Think about your communications and advocacy strategy from the start. Ask:</p> <ul style="list-style-type: none"> • How will we promote our materials and reach new audiences? • Should we share our materials on multiple platforms? If so, how many and which ones? • What will our plan be if/when the project ends or our organisation closes down?
8	What will it cost?	<p>Budget for costs associated with open sourcing, which may include:</p> <ul style="list-style-type: none"> • Planning and workshoping • Technical scoping • Legal support • Materials adaptation, formatting and/or redesign • Website redevelopment • Staff or consultant time



CONCLUSIONS AND **LOOKING AHEAD**

Open sourcing its materials was a steep learning curve for Shine. It hopes the framework in this Learning Brief can help other organisations identify their open-sourcing goals, choose a license, adapt materials, home and promote their materials, and budget for the process.

Key recommendations for those planning for or considering this path include:

- Take time up front to think about your goals, your target audience and their needs, the materials' long-term home (or homes), and the costs involved.
- Consider how you hope resources will be used, and choose a license and format that will best enable that sharing.
- Be realistic about the pros and cons of openness. What are the risks you want to mitigate, and how likely are they? Wherever possible, err on the side of openness.
- When designing or adapting materials, start with the user in mind, not the content.
- Ensure materials ownership is explicitly transferred to your organisation in consultant contracts.
- Consider a static website to reduce maintenance.
- Think about what happens to materials after a project ends. Consider housing your materials in more than one location.

Along the way, Shine also grappled with sector-wide challenges that it did not have the capacity to tackle. Even though open-source materials are on the rise in South Africa, it is still difficult for people to find out about, access, evaluate and use the resources they need. Contributing factors include:

- Resources are **not collated in one central, easy-to-navigate repository**. There is no central place to see the full “continuum” of resources: from early childhood to older grades, for use in and out of classrooms, by professionals and volunteers, in all languages.
- Most open-source materials have **not been developed and formatted for easy use and adaptation**: they are not shared in print-ready, editable formats.
- Many resources are not clear about their **conditions of license** (who is the license holder and what license is being used).
- Existing efforts to collate open-source materials are often **overwhelming** and are **difficult to navigate**, particularly for people without a high degree of digital literacy.
- Most community-based organisations are **not well-equipped to assess quality** of materials or suitability to their situation.
- Most sites hosting materials are not **zero-rated** and many potential users cannot afford to access them.

To increase access to high-quality resources, individual organisations have a role to play. But there is also an opportunity for collective, coordinated action to ensure that existing open-source materials reach those who need them the most. Shine's donation to Wordworks to create a literacy resource hub for ages one to nine is a step in the right direction, but there are many more resources that people need help navigating.

This may take the form of a centralised, curated repository that is actively maintained and mediated for users – ideally managed by a neutral body, such as a funder, and with buy-in from the Department of Basic Education.

As part of its legacy, Shine encourages the literacy and education sectors to **continue this important conversation.**



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