The Rebus Foundation
Strategic Plan

OCTOBER 2024

Rebus FOUNDATION

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Introduction

The Rebus Foundation is a long-time advocate and champion for models and technologies to advance the open publishing ecosystem. Founded on the idea that reading and writing are a critical part of our intellectual lives, Rebus has worked to develop open solutions to inform how we read and write, and to bring people and resources together. In the early years, Rebus provided open source software and acted as a partner on open scholarly publishing models and Open Educational Resources (OER) creation initiatives. We created a reading and annotation tool for scholars working with academic materials, as well as a community platform to manage collaborative OER projects. More recently, we have found our niche as a professional development provider that engages communities of practice around OER, open publishing, pedagogy, and related topics.

Fundamentally, at Rebus, we believe in the power of learning and education to create better spaces for us all.

We embarked on a comprehensive strategic planning process from 2022-2024 to guide the work of the organization over the next few years. Much has changed since we embarked on this process, and we are committed to constantly reassessing not only our progress towards goals but also whether the strategic direction aligns with the needs of the current moment. Many thanks to everyone in our network who was involved in this process. Your contributions, insights, and continued support have inspired this strategic plan.

Background

The Rebus Foundation was established in 2016 as a global non-profit organization working to make knowledge freely available in the pursuit of equity, understanding, and the common good.

In our early years, our goal was to create open source software and technology to improve workflows for reading and publishing open educational resources or traditional scholarly materials. In 2019, we established the organization as a Canadian Registered Charity, and continued to advocate for new publishing models and technologies in open education.

Our two software-focused initiatives, Rebus Community and Rebus Ink, were launched in 2016 to support project management for OER creation and open approaches for scholarly reading respectively. While the core technical product in both cases did not take off as hoped, each initiative had varying degrees of success. Most importantly, they helped us see the value of designing for community needs.

On the Rebus Community side, we received clear signals from the open education community to move from our role as a software provider to more impact-driven work as a community supporter and intensive trainer. On the Rebus Ink side, however, signals were not as bright and we decided to sunset this initiative in 2022. This allowed us to focus our efforts wholly on serving the needs of educators and students in

post-secondary institutions through OER and equitable education through Rebus Community.The Rebus Community initiative has seen immense growth since 2019, when we established a professional development course for collaborative teams publishing OER called "Textbook Success Program" (TSP)[1]. The same year, the UNESCO OER Recommendation was adopted and began to inform the strategic priorities of institutions, governments, non-profits, and individual educators. The recommendation furthered investment in OER; for Rebus, this meant steadily increasing community interest and enrollment in the TSP and other Open Education related initiatives. We also began to deliver webinars, offer consultations, and brainstorm ideas for additional programming that might respond to the open education community's needs. The responsiveness of Rebus Community's services was a vital asset during the COVID-19 pandemic as educators were making the shift from in-person to digital or hybrid learning models.

The trends around OER adoption, institutional capacity building for OER publishing, improving student engagement, diversity and equity, the impact of artificial intelligence in higher education, etc. indicate that we are at an inflection point where open education and open practices may be tipped to be part of the new norm in education. It seemed timely for us to pause and examine the role Rebus could play in this new future.

1 The TSP is a one year cohort-based course that allows faculty, librarians, and staff to increase the capacity of their institutions to support and sustain open education resource (OER) programs by learning critical open publishing skills, tailored around support for creation of specific OER.

Rebus' Role in the Education Ecosystem

Rebus' work fits in with a larger ecosystem of partners in the field of education. As we embarked on strategic planning, it was important for us to first pause and understand Rebus' positionality so we could avoid duplicating efforts and instead work collaboratively with organizations and individuals pursuing the same vision. As part of the strategic planning process, we spoke to a wide range of our community members, including past and present clients, collaborators, and organizations.

We work across a range of nodes in the education ecosystem to advance our mission. Our partners include: faculty, librarians, and administrators at 2 and 4 year colleges and universities; provincial/state educational organizations, regional compacts, Boards of Education, education non-profit organizations, and individual scholars/researchers.

In the past, Rebus has been an open source software provider and publishing support partner. In more recent years, we have emerged as a professional development provider with a focus on engaging communities of practice.

We are known for building and strengthening our existing community, as well as engaging people who may be disconnected. An overwhelming majority of our network noted that our focus on holistic approaches is widely admired and respected. One interviewee commented, "Rebus acts as a cheerleader for effective projects and groups doing compelling work." Simply said, we empower individuals to build their own communities of practice. If you're someone who works in the post-secondary education landscape, in whatever capacity, chances are there are points of connection for us to collaborate.

Throughout the years, Rebus has also been a thought-leader and exemplar — not only sharing research, knowledge, lessons learned, and recommendations, but also modelling these practices in our external programming and internal operations.

Today, we see our role in the landscape as a thought partner, catalyst, and leader — we accelerate your progress towards improving affordability and relevancy of education.

Our areas of expertise are open publishing, open education, managing communities, growing networks, facilitation, adult learning, and capacity building.

Vision

Rebus envisions a liberatory future where lifelong learning is valued as a public good and communities leverage education as a catalyst for positive change.

Mission

Rebus serves individuals and organizations working across all levels of education — we offer guidance, community, and spaces for educators to collaborate on pedagogy and publishing. Through our programs and networks, we encourage educators to rediscover passion, purpose, and potential in their work so all learners can embrace the ripple effects of education.

Values

Rebus' work is grounded in a set of values that permeates our philosophy, interactions, and vision. These values drive what we do and how we do it:

Reciprocity:

We believe deeply in the reciprocal nature of the world. Our activities are not conducted in a vacuum, rather, everything we do is a collaborative, collective effort for community — the onus of who we are, how we show up, what we do, and the benefits we reap are all shared.

Authenticity:

We center the human experience in our work and approach by actively creating an environment that encourages and supports people to authentically show up as themselves

Celebrating Joy:

We center and celebrate joy at multiple points throughout the journey, in lieu of focusing only on the destination.

Agency:

We believe that people hold possibility and use collective agency to co-design new spaces for individuals to grow and communities to thrive.

Curiosity:

We stay curious to address key problems in education and to keep growing as individuals and as an organization.

Strategic Priorities

We are aware that change does not happen overnight, but is built on the contributions of many people over the years. Rebus is building a movement of people by empowering the individuals who are trying to bring about change that will benefit all. We will focus on 4 overarching goals, each with multiple objectives and key results indicators to assess our progress and keep us accountable, over the next 3 years:

PRIORITY	MOTIVATION
1. Grow community and advance leaderful cultures	People and society are at the heart of our vision, and we want to continue to offer programming and training for individuals to grow as leaders, and gather the expertise and agency to achieve this vision.
2. Identify partnerships beyond the postsecondary institutional system	There are pathways between primary (K-12), secondary, and tertiary education systems — it is critical to understand how we influence and support one another.
3. Shift culture through advocacy initiatives	Education happens outside formal spaces — where does learning begin and end? How does education shape our world?
4. Strengthen organizational operations	Organizational sustainability is necessary to implement the strategic plan, and creating stability is work.
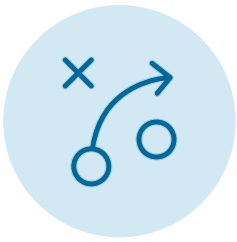
Priorities Explained

Priority 1: Grow community and advance leaderful cultures

Work with educators and administrators to equip them with the skills and knowledge to advance equitable education.

People and society are at the heart of what we do — Rebus elevates individuals and encourages them to build their own communities of practice. Our primary goal is to grow community and advance leaderful cultures. We want to continue to offer programming and training for individuals in open publishing, open pedagogy, equitable education, and more, so they have the expertise and agency to achieve their personal and professional goals, and our collective vision for liberatory futures.

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We want to reorient people towards the true purpose of education as a public good and a public service.

The strategic planning process provided us with important feedback about the viability and relevance of this approach. Our human-centered approach and incorporation of trust and relationship building in our work has created buy-in

amongst our network and enabled us to begin building a movement of people seeking to bring about change. While cultivating excellent educators and administrators is challenging because of systemic issues plaguing the field, it is necessary that we continue to offer upskilling pathways for faculty, staff, and administrators to reach our vision.

"Rebus builds and strengthens existing community, captures people that are alone and gives them a sense of community with people at other institutions, elevates them to build their own communities of practice" – Interviewee

Priority 1: Objectives

Objective 1.1: Continue to deliver professional development programs designed to shift perspectives and build capacity for equitable education strategies in the post-secondary environment.

Objective 1.2: Encourage more voices in the field and create a pipeline for historically-excluded groups and individuals to establish themselves as leaders.

Objective 1.3: Support leaders in visioning and implementing equitable education ideas and strategies.

Priority 2: Identify partnerships beyond the postsecondary institutional system

Engage communities that work with educators in a variety of settings outside of traditional higher education learning centers and institutional spaces to drive long-term impact.

Rebus has a unique opportunity to nurture relationships with key organizations that share a similar vision. A major tenet of our work is that learning does not just take place in a classroom and access to education is not available to many people across a number of socioeconomic stratas.

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Rebus must partner with folks on ground directly working with these individuals to really understand needs and meet them where they're at. This will look different for different populations and each population will need a different strategy.

Ultimately, Rebus seeks to effect change for all learners, and learning from partners who work in the K-12 space and are sowing the seeds for learning attitudes and classroom models early on would inform our work in the post-secondary field.

In an attempt to expand our imaginings to consider what a different, more culturally responsive approach in the classroom looks like, we want to focus on this priority: form partnerships beyond the postsecondary institutional system. Partners would include cultural and civic institutions and education organizations working in K-12 or beyond the post-secondary market. The wide majority of our network agreed that this was a good avenue for Rebus to pursue, while paying attention to the level of investment required to ensure it does not overburden existing resources.

Success for this priority requires us to cultivate intentional partnerships and learn from other institutions and organizations who have worked to expand access to education outside of the classroom, including MOOCs, libraries, and academic institutions who have worked to expand secondary/post-secondary education opportunities to prisons.

"All the populations you mentioned are totally right on. I worked with librarians to disseminate information through public libraries. It is a great opportunity as then the audience is the general public." – Interviewee

By considering education as extending beyond the university and college walls and forming partnerships with educators in other spaces, Rebus can act as a bridge to share good practices, insights, and lessons.

Priority 2: Objectives

Objective 2.1: Nurture relationships with cultural and civic institutions to lay the groundwork for incorporating equitable education strategies beyond post-secondary institutions and in informal learning spaces.

Objective 2.2: Connect with people advancing open and equitable education in K-12 education.

Priority 3:
Shift culture through advocacy initiatives

Situate and grow our role as a changemaker in the equitable education field, and the direct and indirect impact it can have on advocacy.

Given Rebus' 360 view of the sector and immersion in trends and challenges in the educational sector, we are well positioned to raise awareness about systemic issues. In order to drive systemic change, we recognize the need to build deep partnerships, authentically and intentionally, to engage new voices and perspectives — and we have designed priorities 1 and 2 accordingly.

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This priority highlights how thought leadership, policy, and advocacy is another integral piece of the puzzle to shift our culture towards one that is more liberatory.

As an independent institution, we are not limited by institutional mandates, and we can serve as a bridge between grassroots organizations and policy change. Both levels are needed to drive change. Rebus has the unique opportunity to share learnings from the field and model the types of cultures we are hoping to see in the world. Through this strategic priority, we also plan to partner with others who are experts in advocacy and narrative change.

Education, as Rebus understands it to exist with the values of diversity, equity, and inclusion inherently built in, is a contentious issue in the US and Canada with a well-oiled machine of individuals attempting to undercut what we do. While these views are not universal, their effects can be catastrophic. In the U.S. and Canada the challenges are deep and structural with roots in colonialism, capitalism, neoliberalism, and systematic racism. Given the current backlash against DEI and indigenization, it is a timely area for investment, yet will not see change overnight. However, this is the heart of our vision and what our organization is attempting to do — this priority will allow us to build more expertise and partnership in areas beyond open publishing and pedagogy that can influence the future of education ecosystems.

This pathway in combination with our other strategic priorities can help to collectively disrupt systemic inequities and reimagine systems.

Priority 3: Objectives

Objective 3.1: Leverage Rebus' learnings from its programs and activities to produce thought leadership on trends and opportunities in the open equitable education sector.

Objective 3.2: Partner with organizations who are experts in political advocacy and narrative change.

Priority 4: Strengthen organizational operations

Fundamentally, we want to continue to build an equitable organization that enacts our core values and is equipped to meet our strategic priorities.

To accomplish the strategic plan, Rebus will need the leadership, diversity, and culture internally at the organization to drive change. Primary takeaways that emerged from the planning process related to strengthening and diversifying resources and staff.

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As with all organizational imperatives, the journey towards liberatory futures starts with the people behind the work.

With this priority, we will identify how the people of Rebus and our practices need sustaining to fulfil our mission.

Priority 4: Objectives

Objective 4.1: Build internal capacity within the organization to meet strategic goals.

Objective 4.2: Diversify Board of Directors to better represent interests and needs of The Rebus Foundation's community.

Objective 4.3: Diversify funding sources and grow revenues to support the strategic priorities and ensure Rebus' long-term sustainability.

Objective 4.4: Invest in brand visibility through enhanced marketing and communications locally and globally to effectively reach all parties.

Conclusion

Rebus has always been dedicated to building a model for open publishing with collaboration and inclusivity at its core to serve the open education field's needs while highlighting the community's values. The last several years have demonstrated the need for us to move beyond publishing and consider what new futures for the education system more widely could look like. How could our work positively impact all learners, everywhere?

With this central question in mind and with our core values of curiosity, authenticity, agency, joy, and reciprocity at heart, we determined our role in the broader education ecosystem and set four clear strategic priorities:

1. **Grow community and advance leaderful cultures**

2. **Identify partnerships beyond the postsecondary institutional system**

3. **Shift culture through advocacy initiatives**

4. **Strengthen organizational operations**

We hope that these four priorities bring us closer to a world where educators rediscover passion, purpose, and potential in their work, and where learning is embraced by all.

This strategic plan honours who we have always aspired to be as an organization, while also guiding and enhancing Rebus' work moving forward over the next three years — all of which will help us achieve our vision and mission. We hope you will be a part of this story.

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Unlike other groups, Rebus has purity about their role… They are community driven and that's their silver bullet."

– Rebus Interviewee

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