

# Unizin OER Authoring Task Force Report

June 2016

## Executive Summary

- The Task Force established an **Open Educational Resource (OER) Common Authoring Framework (CAF)** useful to any Unizin Member wishing to catalyze or accelerate their OER development.
- The **OER CAF** focuses on the **institutional processes and technology** needed to author content. It raises a series of questions and next steps that will mature the framework. We recommend that other Task Forces tackle these questions.
- The Task Force recommends that Unizin provide members with technology in support of the **OER CAF**.
- The document below can be circulated by OER Authoring sponsors as a guide to start and align collaborations within their institution around OER content authoring.

## Detailed Summary

**Task force goals:** In March 2016, Unizin formed the OER Authoring Task Force. Its purpose was to establish a common framework and model of practice for Unizin institutions to support the faculty-led **authoring and production of open textbook content, with a particular focus on textbooks**. Such a framework and model of practice could achieve two tactical goals: 1) catalyze or accelerate institutional OER textbook production, 2) enable consortium-wide collaboration of OER textbook production.

The Task Force's purpose was also to recommend to Unizin a set of services and technology in support of that common framework and model. The technology and services would focus on the creation of open textbooks. This task force did not attempt to establish a common authoring and production framework for other genres of open content, such as course materials, texts and quizzes, software, visualizations, simulations, etc., although those needs should be addressed by future task forces. A total of eight Unizin institutions were represented on the OER Authoring Task Force.

**Methodology:** In April 2016, the Task Force surveyed the OER authoring practices of its eight represented institutions. It used an "Information Gathering Template" co-developed by the Task Force Chair and Unizin to guide its survey. The purpose of the survey was to, for each member,

take stock of the goals for OER production; range of titles produced; the funding mechanisms; dissemination practices; incentive programs; technology used; project management practices; and the delivery models. Information about OER production for each institution is gathered and available in the [Google Drive folder linked here](#).

**Results:** After review and discussion of the information gathered, the Task Force recognized a clear need for a common framework, model and toolset to produce OER textbooks. Such a framework, we propose, consists of four elements:

**1. Institutional, strategic efforts to incentivize and encourage faculty-led OER**

According to the information gathered, we determined that where OER content production is already in practice, we see a pattern of proactive RFP, financing, project management, and workflow paradigms to encourage and support OER production. We offer examples of a variety of these programs, which institutions may wish to adopt or adapt at their own institutions, or deploy in a cross-institutional effort.

**2. Project management and production of faculty-authored OER.** According to the information gathered, most Member institutions currently producing OER books and content let faculty author in whatever publishing tools are familiar to them. Common choices range from Apple Pages and iBooks Author to Microsoft Word and LaTeX. However, all of the Member institutions producing OER books and content have used or minimally experimented with Pressbooks, a CMS developed out of the Wordpress infrastructure, to produce, publish, export, and in some cases deliver their OER content. See the “Overview of Participating Institutions” below for more information.

**3. Distribution and discovery of faculty- and staff-authored OER.** The OER Authoring Task Force believes that enriching the CAF with a clearer survey of options and recommendations to Unizin regarding Distribution and Discovery should be the goal of a distinct Task Force.

**4. Delivery, usage, and impact of faculty-authored OER.** The OER Authoring Task Force believes that enriching the CAF with a clearer survey of options and recommendations to Unizin regarding Delivery, Usage, and Impact should be the goal of a distinct Task Force.

**Recommendation:**

- **The Task Force recommends** that all institutions adopt the OER CAF – its models, practices, and technologies. The Framework establishes a set of Consortium-level norms that best-position member institutions to work with each other, avail themselves of Unizin solutions, and scale their efforts.
- **The Task Force recommends** that Unizin host and offer a Pressbooks-based authoring tool to Unizin Member institutions. It **further recommends** that all Content Relay products integrate with Pressbooks and leverage the EPUB-formatted content exported

from Pressbooks instances. Integrating content authoring Services and tools into the Content Relay will strengthen the content ecosystem of our institutions and the development of common authoring and development models.

## The Common OER Authoring Framework (CAF)

The following section outlines four key components of the Common OER Authoring Framework (CAF) proposed by this Task Force. It is divided into four sections that broadly map onto aspects or stages of a typical, institutionally-supported content authoring lifecycle.

### 1. Institutional, Strategic Efforts to Incentivize and Encourage Faculty-Authored OER

Many faculty desire to produce Open Educational Resources, most often textbooks, but lack the expertise, tools, or financial means to create open materials. In some cases, faculty are also unaware of the services or resources available at their institution.

Among the universities represented in the OER Authoring Task Force, libraries and various affordability initiatives tend to take the lead on their respective campuses in providing services, financing, and technology to support faculty-led OER production, especially of open textbooks.

Indeed, the most common strategies to support OER Authoring turn on grant, RFP, and service frameworks that are already familiar to Faculty and that are available in familiar channels. These strategies have proven successful in advertising, organizing, and incentivizing faculty-authored OER at Unizin institutions. Examples of these strategies include:

- **Granting/incentive programs:** these programs provide various levels of funding for faculty to take the plunge and create open content. Some grants provide enough money to completely write an open textbook, while others only provide an incentive. Examples include:
  - North Carolina State University's [Alt-Textbook Project](#)
  - Penn State University's [Faculty Engagement Awards](#)
  - University of Iowa's [Open Access Fund](#)
  - University of Wisconsin-Madison's Educational Innovation Small Grant Program
  - University of Massachusetts Amherst's – [Open Education Initiative](#)
- **Affordability content programs:** These programs help faculty find alternative content to expensive textbooks for their courses. Alternative content can include library licensed materials, open textbooks and other OER, lawful determinations of fair use, and creation of new content, including open textbooks and OER. These programs can also include incentive grants. Examples include:
  - The University of Minnesota's [Partnership for Affordable Content](#)

- North Carolina State University's [Alt-Textbook Project](#)
  - Ohio State University's [Affordable Learning Exchange](#).
  - Temple University: [Alternative Textbook Project](#)
  - University of Oklahoma's [Adopt an Alternative Textbook](#)
  - The University of Wisconsin's [eTexts: Adopt, Remix, Create](#)
- **Library Publishing Services:** Seeking to better preserve and make more accessible scholarship produced at their institutions, libraries all over the world offer publishing services to help faculty and researchers publish their content including open access journals, scholarly monographs, conference proceedings, and open education resources such as open textbooks. These programs typically respond to faculty need/requests for production or technology services, rather than proactively incentivizing faculty to create or adapt new content, and may not be focused on OER. Examples include:
    - University of Michigan's [Michigan Publishing Services](#)
    - University of Minnesota's [Publishing Services](#)
    - University of Iowa [Libraries' Publishing Services](#)
    - Ohio State University's [Libraries Publishing Program](#)
    - University of Wisconsin-Madison's [Parallel Press](#)
- **Criteria/Subject based production:** These programs focus on both gaps in the subject matter of open textbooks (and seeking to fill those gaps) and on the textbook needs of large enrollment courses. Concerning the latter, providing open textbooks to large enrollment class can quickly demonstrate large cost savings and effectively further the cause of open textbook production. Examples include:
    - NOVA & Tidewater (not-Unizin members): <https://www.washingtonpost.com/news/grade-point/wp/2016/06/15/college-courses-without-textbooks-these-schools-are-giving-it-a-shot/>
    - OpenStax [<https://openstax.org/impact> and <https://openstax.org/higher-ed>]
    - Large recent cross-institutional study on effectiveness of OER: <http://link.springer.com/article/10.1007%2Fs12528-015-9101-x>
- **Information portals/landing pages:** More an information resources than a specific service, these websites, portals, or landing pages are often a first stage for universities beginning to support OER. They serve to orient faculty to the concept of OER, answer key questions, and guide them to options for services, information, and support that may meet their needs. Examples include:
    - The University of Michigan's [Open Michigan](#)
    - University of Iowa's [OER Subject Guide](#)
    - Penn State University's [OER@PSU](#)
    - University of Wisconsin-Madison Open Educational Resources (OER)
    - University of Wisconsin-Madison [Library Research Guide on OER](#)

## 2. Project Management and Production

Project-managing OER content authoring is key to the successful production of OER content.

The Task Force did not find evidence that OER content production independent of institutionally provided project management is a successful or efficient strategy for authoring and developing OER content.

Broadly speaking, the “project management” of OER content authoring resembles traditional editorial and publication processes. Typical project management teams include a team lead who enforces timelines, milestones and production workflows; a technology support; and a set of resources to style, order, post-produce, and publish manuscripts completed by authors (who, in almost every case, are faculty).

In almost every case, the Task Force found that faculty are encouraged to develop content in their preferred desktop publishing software – usually a Word Processor like Microsoft Word or Apple Pages. When manuscripts are complete, the OER content management team will work with the faculty member to produce the content (media, links, etc) and to publish it with formal publication software.

The OER Authoring Task Force **recommends to Unizin** that it provide member institutions with access to Pressbooks, an open-source, popular, and OER-community-supported Book Content Management System that is particularly excellent for the **post-production and publication** of book-based content.

Faculty support, training, and instruction around open textbooks is imperative, including training about open licenses, how to find and properly use open content (e.g., open-licensed images), how to properly give attribution, and where newly created content can be shared and disseminated.

The OER Authoring Task Force also found that, in many cases, institutions provide workshops and training seminars to answer basic questions to faculty such as:

- What is an open educational resource (OER)?
- What types of OERs exist?
- Why are OERs valuable to institutions and students?
- How are they produced?
- How do you find media to enrich content production?
- How are they distributed, shared and licensed?
- How will they be supported by an institution over time?
- What are typical timelines and workflows for producing OERs?

**NOTE: The OER Author Task Force believes that enriching the CAF with clear models and practices for project management should be the goal of a distinct Task Force.**

### 3. Distribution and Discovery

After OER content is authored and produced, it must be distributed and made discoverable by those at one's institution and, if desired, the public at large.

It is important to offer faculty clear choices about how to make their content available, whether it is at their own institutions or worldwide. These choices should cover:

- Licensing options
- Re-use / re-mix enabling
- Exporting & delivery options
- OER Distribution channels

The OER Authoring Task Force did find that a couple of our institutions provide content to a few institutional and third-party repositories where they are made discoverable. These include:

- **Library catalogs.** Or, indexing the content in library databases where appropriate.
- **The [Open Textbook Library](#).** New books must meet their inclusion criteria including either being used at multiple higher education institutions; or affiliated with an institution, scholarly society, or professional organization. Books must also make available a portable download format such as PDF or EPUB.
- **[Open Stax CNX](#) or [OER Commons](#).** These repositories are popular and well-qualified sources of OER content useful to higher education institutions.

In addition, faculty on some member campuses have used:

- **[BC Campus OpenEd Resources](#),** which enables faculty to find, adopt, and/or modify open texts.

The OER Authoring Task Force **strongly recommends** Unizin that Unizin provide a clear, unified set of mechanisms for making OER content –especially textbooks– available within its suite of Content Relay products, including Unizin Discover.

**Note: The OER Author Task Force believes that enriching the CAF with a clearer survey of options and recommendations to Unizin regarding Distribution and Discovery should be the goal of a distinct Task Force.**

## 4. Delivery, Usage, and Impact

The OER Authoring Task Force was able to survey issues related to the delivery and measurement of OER content use in instructional contexts.

On the Delivery side, these include:

- Delivery of reflowable content
- Delivery of media assets in a scalable, reliable way
- Delivery with Entitlement management

On the Measurement side, these include:

- Measurement of student content interaction data
- Generation of content interaction reports
- Data solutions in support for the editorial lifecycle (e.g., new editions based on data describing high or low content use).
- Standards based data capture and reporting.

**Note: The OER Author Task Force believes that enriching the CAF with a clearer survey of options and recommendations to Unizin regarding Delivery, Usage, and Impact should be the goal of a distinct Task Force.**

## Technology proposal/roadmap

Based on the Content Authoring Framework it developed, the Task Force worked with Unizin to develop technology requirements in support of content authoring. Based on those requirements, Unizin has developed the following technology roadmap, with two provisos. First, subsequent Task Forces recommended by this Task Force may alter the roadmap. Second, Unizin reserves the right to change or re-prioritize the roadmap.

In particular, the OER Authoring Task Force recommends to Unizin that it make a Pressbooks hosting service available to all Unizin institutions.

Pressbooks is recommended for a number of reasons:

- Open-source
- Well supported and recognized in the OER community
- Proven to be reliable publishing platform
- Actively developed

In line with the other products and services developed for the Content Relay by Unizin, and also in line with the recommendations of the CAF, Unizin and the Task Force propose the following technology roadmap.

# Communication and Building Community

The OER Authoring task force recommends a four-pronged approach to communicating the Unizin Supported Model of OER Authoring. First Unizin should create and distribute a press release to describe the goal of the OER Authoring Task Force, the report itself, and the model of support that Unizin will provide to institutional members. The second part of the approach is to share the report and the recommended OER Authoring Process within the Unizin Faculty Engagement group of the Teaching and Learning Committee, who can then help to facilitate communication at each institution. The Unizin site itself will serve as the third approach in communicating the suggested framework to the Unizin Community for OER authoring as well as instructions on how to request a Pressbooks account. The fourth component is for Unizin to provide a directory of those working on OER Authoring initiatives at Unizin institutions to facilitate institutional collaboration and provide a vehicle to establish relationships among key players.

## Task Force Members

<b>Task Force Member</b>	<b>Institution</b>	<b>Institutional Role</b>
<b>Anne Leftwich</b>	Indiana	Assoc. Prof. Instructional Systems Tech.
<b>Jeremy Van Hof</b>	Nebraska-Lincoln	Coordinator, Academic Technologies
<b>Shane Nackerud</b>	Minnesota	Technology Lead, Libraries Initiatives
<b>Kris Olds</b>	Wisconsin	Professor, Geography
<b>Stephanie Orr</b>	Ohio State	Associate Director of Learning Experience at Office of Distance Education and eLearning
<b>Rebecca Welzenbach</b>	Michigan	Dir.. Strategic Integration and Partnerships.
<b>Stan Kruse</b>	Colorado State	Instructional Designer
<b>Annette Beck</b>	Iowa	Director of Enterprise Instructional Tech.
<b>Hannah Scates Kettler</b>	Iowa	Digital Humanities Librarian
<b>Julie Lang</b>	Penn State	OER Coordinator