

Open Educational Resources Workshop: Planning an OER Project

Spring 2022



LIBRARY





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AGENDA

- Outline 5 major phases of OER creation
- Review key elements of the Project Charter
"the big picture"
- Discuss components of a planning document that includes a timeline
"the details"
- Consider importance of an established style guide
- Review UVA tools for project management and collaboration
- Consider external (non-UVA) Kanban project management tools
- Outline 'good reads' & communities related to OER
- Discover the Library's Jefferson Trust sponsored grant opportunity for OER support

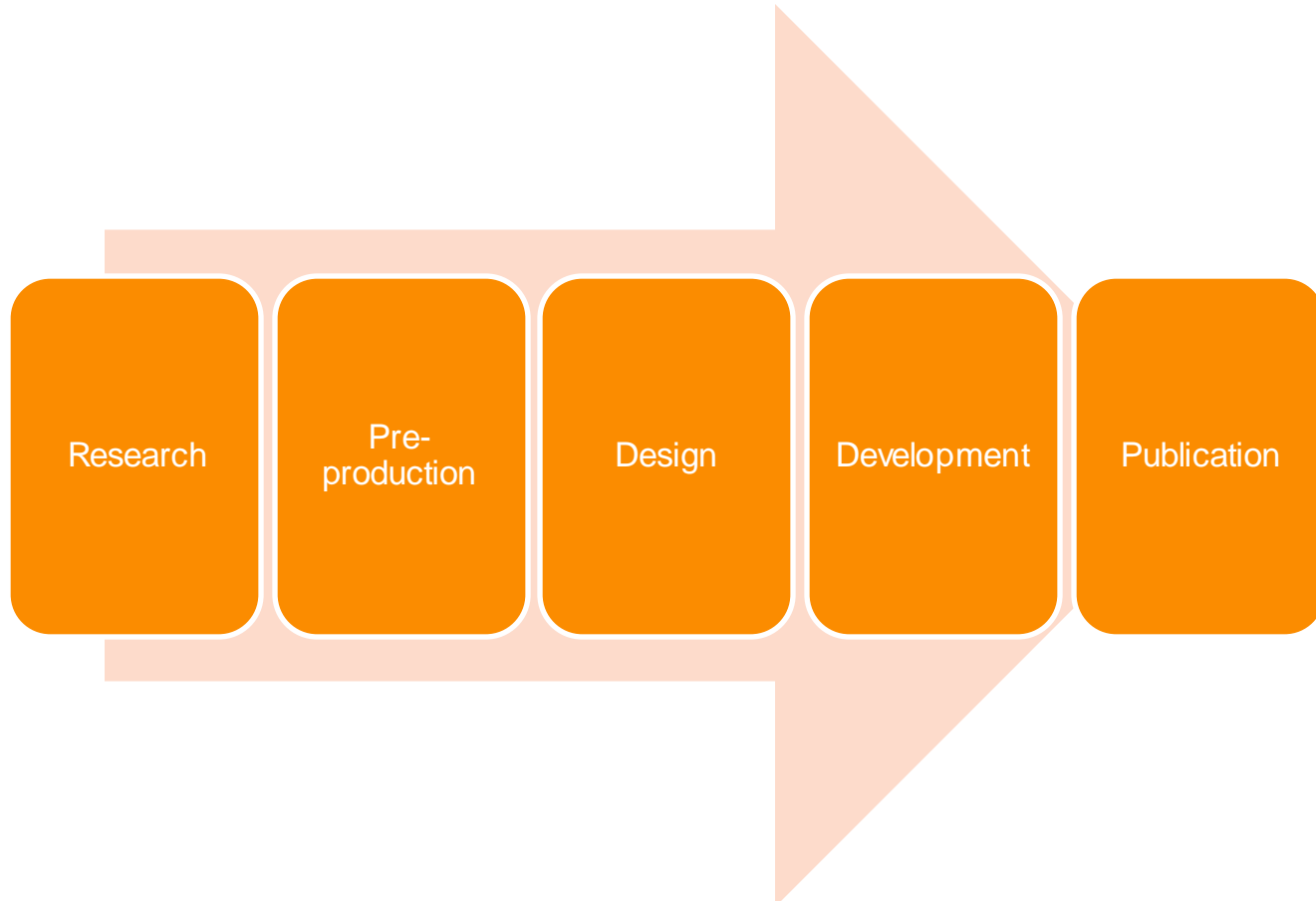
..and time for questions!



Where are you at in your OER journey?
Have you published a textbook previously?
What questions do you bring to today's session?

5 Key Phases of OER Creation





Look familiar? This is roughly based on instructional design framework models.

Step 1: Research

Questions to Consider:

- What is your familiarity with OER?
- Have you explored OER content in your subject area?
- What are you hoping to achieve with OER integration?
- What are your 'big questions?'



**Connect
with the
Library**

Step 2: Pre-production

Including:

- Curation of existing resources
- Skeleton outline
- Rough timeline established *with* actionable milestones
- File management considered



**Connect
with the
Library**

Step 3: Design

Last planning step before 'work' begins on OER

Including:

- Project outlines fully fleshed out
- Timeline finalized
- OER for reuse fitted into place
- Determine style & graphic elements
- Engage instructional designer—if planning to use one

Step 4: Development

Weightiest and most time-consuming

Including:

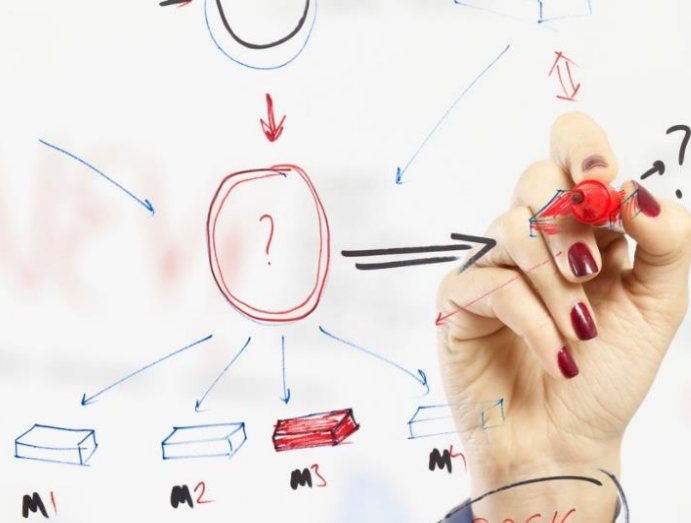
- Existing OER modified or adapted to meet needs
- New content development, testing, and revision takes place
- Copy editing
- Accessibility checks completed
- Intellectual property checks & attribution for existing content
- CC license for new content

Step 5: Publication

Including:

- Sharing out of content created
- Creation of export versions
- Archiving editable files for those who wish to remix work
- Depositing in Libra (UVA's institutional repository)
- Dissemination to learners via open publishing

Helpful Organizational Documents



ORGANIZATION

BASIC
PLAN

Project Charter

[Project Charter.docx](#)

Purpose: *Big-picture overview of your project. Excellent for sharing with stakeholders and providing an initial scope.*

1. Partners	Include names for all involved in the project. This may include a project champion, sponsor, or departmental working group.
2. Scope	Include a brief statement that clearly defines the scope of the project. It should describe what course(s) the project will cover, what type of resource(s) it will be, and provide a general context for content.

Project Charter cont...

Project Charter.docx

3. Budget	<p>Include a high-level budget with 4-5 key costs and the amount of money allocated to these costs.</p> <p>For example:</p> <ul style="list-style-type: none">• Overall budget = \$• Subject-matter experts (SMEs) = \$• Editing = \$• Graphic design = \$• Etc.
4. Risks and Planning	<p>Include high-level risk statements and a mitigation or contingency plan to prepare for/respond to the risk should it arise. You can include constraints here as well.</p>
5. Goals	<p>Include the high-level goals that this project is aiming to support. These may come from existing documents, such as the grant proposal or the contract.</p>

Project Charter cont...

[Project Charter.docx](#)

6. Deliverables	<p>Include each deliverable with a brief description. Consider “open” when constructing these statements.</p> <p>For example:</p> <ul style="list-style-type: none">• Open textbook for Sociology 102 course• Ancillary case studies for student practice
7. Audience	<p>Describe the audience for the project. This can include groups such as post-secondary institutions, communities, government, and entire sectors that are may be contributing to and benefiting from the project deliverables.</p>
8. Milestones	<p>Include milestones that support your path to meet the deliverables. These milestones can be included as guides for your completed timeline.</p>

Detailed Project Scope & Timeline

[Detailed Project Scope and Timeline.docx](#)

Purpose: *Nuanced document that clearly defines roles, project elements, and defines a timeline for project work.*

Project Manager

Name:

Email:

Other contact information:

Authors

Author/Editor	Institution	Email	Phone	Notes

Authoring Platform/Writing Tools

Platform/Tool Type:

Details:

Add notes about training and access for author(s), editors and others participating in the project.



We'll discuss organization/tools in more detail.

Detailed Project Scope & Timeline cont...

Detailed Project Scope and Timeline.docx

Contracts (as applicable)

Contributing Authors

CONTACT INFO

Name	Email	Phone	Address

DELIVERABLES

Topic	Length/word count	Notes

Start date:

End date:

Fee:

Copyright:

Copy Editor

CONTACT INFO

Name	Email	Phone	Address

(Deliverables) Details about what will and won't be edited:

Start date:

End date:

Fee:

Illustrator/Graphic Designer

CONTACT INFO

Name	Email	Phone	Address

(Deliverables) Details about scope of work:

Start date:

End date:

Fee:

Detailed Project Scope & Timeline cont...

[Detailed Project Scope and Timeline.docx](#)

Copyright

List who owns copyright and what portion or element of the textbook they own. For example, "Illustrator owns copyright for all illustrations in Chapter 1." **Note: For 'true' OER, copyright licenses should be as open as possible.**

Element	Owner	Copyright License

Detailed Project Scope & Timeline cont...

Detailed Project Scope and Timeline.docx

Project Timeline

Chapter/ Section	Author / deadline	SME* review / deadline	Review & Fix / deadline	Editor / deadline	Proofread/ deadline	Notes	Payment (if applicable)
Front Matter							
Chapter 1							
Chapter 2							
Chapter 3 etc...							
Back Matter							
Proof reading						<i>Conduct final review and fix before proof reading.</i>	
Completion of Book						<i>Examples of items for book completion:</i> <ul style="list-style-type: none">• <i>Author biographies</i>• <i>Acknowledgement or dedication, introduction, preface, etc.</i>• <i>Copyright notice/license</i>• <i>Textbook cover</i>	



We'll discuss
organization
tools in more
detail.

This is the
heavy lift.
Attention to
the timeline
will result in
a smoother
project flow.



Detailed Project Scope & Timeline cont...

[Detailed Project Scope and Timeline.docx](#)

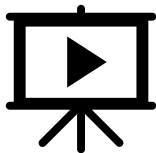
Review and Fixes

List issues identified during the project and standard items that need checking are listed here. These issues are worked on both during the project and after the final copy-editing session, but before proof reading.

Image/Multimedia Inventory

Ensure that all links function correctly, all images have Alt Text, and multimedia elements ([i.e.](#) H5P) function properly.

Chapter/Section	Figure no.	Source link	Issue	Replacement/Solution



Subject Matter Expert (SME) Review

Verification that the content itself is accurate.

Chapter/Section	SME	Start date	Due date	Notes



Detailed Project Scope & Timeline cont...

[Detailed Project Scope and Timeline.docx](#)

Copy Editing

Copyediting differs from proofreading in that it is a process that seeks to ensure that text is clear of wordiness, unnecessary jargon, and content is clear. This process may involve a re-write or substantial editing and is usually conducted chapter-by-chapter.

Chapter/Section	Editor	Start date	Due date	Notes



Proofreading

Often a book will be proofread in its entirety, unlike copy editing, which is typically done with individual chapters or a small selection of chapters. Sometimes, however, the proof reading will be broken up depending on the timing and size of the textbook.

Chapter/Section	Editor	Start date	Due date	Notes



Style Guide/Style Sheet

Style Sheet.docx

Last revised: (DATE)

Based on Style Guide: (NAME OF STYLE GUIDE—if applicable)

Contact information

	Name	Email	Phone
Author			
Copy editor			
Proofreader			

Spelling and Abbreviation List

A-B

Example: AAPC (Accounting and Auditing Policy Committee)

Example: anaesthesia

Style Guide/Style Sheet cont...

[Style Sheet.docx](#)

Citation Style

Type: *Examples:* APA, MLA, Chicago, etc.

General Style

Example: Written in the present tense.

Learning Objectives

Example: There is a Learning Objective page at the beginning of each case study.

Example: This page begins with a paragraph or two of introductory text.

Example: The text is followed by a list of learning objectives placed in the LO textbox.

- a. Learning objectives begin with this statement: “In this case, learners have an opportunity to:”
- b. Learning objectives are listed using a numbered list.
- c. There should be no period at the end of each listed learning objective.

Style Guide/Style Sheet cont...

Style Sheet.docx

Headings and Labels

Example: Chapter titles should use title-case

Example: Chapter section titles should use sentence-case and Heading 1

Tables

Example: Column labels should be centered.

Capitalization

Example: Generic names for medications should be lower case. Brand names should be capitalized.

Punctuation

Example: Use serial comma

Example: Use italics for internal dialogue, i.e., when individual is thinking about something, e.g.,
She thought to herself, *I wonder what he's up to.*

Numbers

Example: Express time using the 24-hour clock, e.g., 13:00 for 1pm.

5 Rules of Textbook Design

5 RULES OF TEXTBOOK DEVELOPMENT

- 1 Rule of Frameworks
- 2 Rule of Meaningful Names
- 3 Rule of Manageable Numbers
- 4 Rule of Hierarchy
- 5 Rule of Repetition

RULE OF FRAMEWORKS

Maintain a consistent structure.

The text can best aid understanding by making this framework visible early on.



The framework acts as a **mental roadmap** that allows learners to navigate within and through the subject domain.

RULE OF MEANINGFUL NAMES

Create and use consistent titles and terminologies.

These names are critical to the ability to recall or retrieve the things we know and remember.



common and consistent
Title and Terminology

Use terminology that is **common in your discipline.**

RULE OF REPETITION

Repeat important concepts.

There is a pattern of repetition that aids in promoting the elements of a subject from short-term to long-term memory



frameworks and important hierarchies are repeated as many as **five or six** times



frequently used elements are repeated **three or four** times



elements of lesser utility **may not be repeated** at all

RULE OF HIERARCHY

New knowledge builds on learned knowledge.

The student needs to understand the foundational knowledge before being introduced to a new concept. When new concepts are introduced they should be explicitly connected to the foundational material.

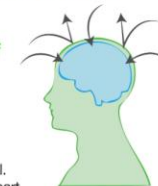


When introducing new material, only refer to foundational material if it is **relevant** to the new material.

RULE OF MANAGEABLE NUMBERS

Limit the amount of new information introduced at one time.

Most of us are limited in our ability to absorb new material. As we become familiar with part of a subject domain, this number expands



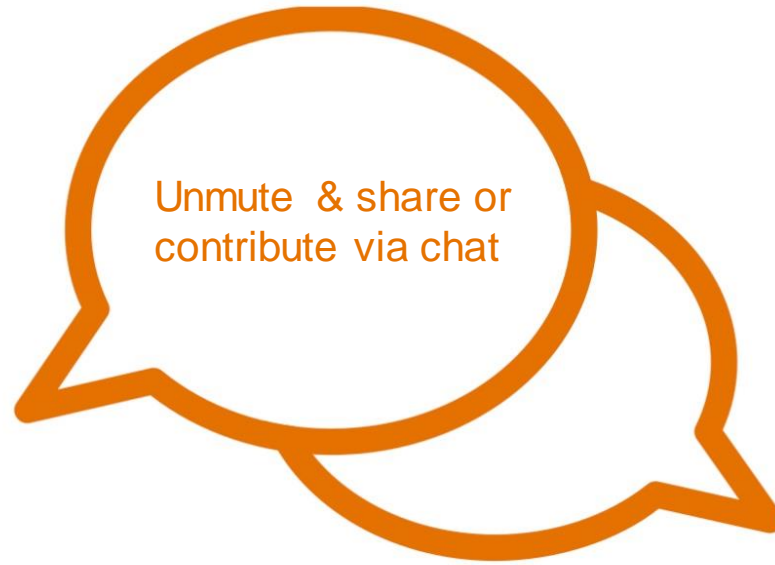
For new material, **four to six** new elements is a reasonable limit

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Collaborative Tools



Are there tools that you currently use that you are considering for your project?

What challenges do you face/have you encountered with management of collaborative projects?

UVA Tools

Office 365 products:

- OneDrive (file storage)
- OneNote (drafting, organization)
- Teams (collaboration)
- Planner (visual organization, assignment of tasks, links with ToDo app)

Box

Confluence

Project Management (Non-UVA Supported)

Kanban style organization

[Monday.com](https://monday.com)

Limited with 'free' account

[Trello](https://trello.com)

Limited with 'free' account

[leantime](https://leantime.com)

open source

Resource Management

Zotero

Bibliographic manager

Guide from Library on Zotero

zotero

[Web Library](#)

[Groups](#)

[Documentation](#)

[Forums](#)

[Get Involved](#)

[Bethany Mickel](#) ▾

🔍 Title, Creator, Year

My Library				
citation-318828025		Title	Creator	Date
IMLS Grant		Assessing perceptions of resources and inclusive teaching practices: A c...	Schwab et al.	2020-06-01
Online Teaching Resources f...		Who Gets to Wield Academic Mjolnir?: On Worthiness, Knowledge Curati...	Nusbaum	2020-05-11
USEM Course		We're Migrating Online: Are Students Ready? LinkedIn	Sekel	2020-03-10
My Publications		Going Online in a Hurry: What to Do and Where to Start	Miller	2020-03-09
Trash		Students' Sense of Belonging Varies by Identity, Institution	Johnson	2020-01-02
Group Libraries		The Effects of Training on Instructor Beliefs about and Attitudes toward ...	Brinkley-Etz Korn	2020-01-02
4-VA		A Reflective Study of Online Faculty Teaching Experiences in Higher Edu...	Perrotta and Bohan	2020
Inclusive Teaching UVA		Who Gets to Wield Academic Mjolnir?: On Worthiness, Knowledge Curati...	Nusbaum	2020
OER & DEIA		Supporting Learning Engagement with Online Students	Buelow et al.	2019-01-25
OER at UVA		Creating a Win-Win: Designing and implementing mutually beneficial coll...	Wrye et al.	2019-01-01
		The Digital Life of Henrietta Lacks: Reforming the Regulation of Genetic ...	Russo	2018-07



Rule(s) of Thumb:

- Keep it simple, but effective.
- Don't get bogged down with too many tools.
- Discuss & agree with your team.
- Make it manageable for your work style.

Further Reading &
Communities of Support



OER *About* OER Publishing

(very meta)

[Self-Publishing Guide](#) (BCcampus)

[OER Starter Kit](#) (Iowa State)

[Adaptation Guide](#) (BCcampus)

[Authoring Open Textbooks](#) (University of Minnesota)

[A Guide to Making Open Textbooks with Students](#) (Rebus Community)

[The Rebus Guide to Publishing Open Textbooks \(So Far\)](#)

Communities of OER Support

Scholarly Publishing and Academic Resources Coalition (SPARC)

Community of discussion/support of educational publication

Rebus Community

Support for collaborative open publishing

The Center for Open Educational Resources & Language Learning (COERLL)

Language OER community based out of UT Austin

Affordability & Equity Grant



LIBRARY

- Adopt, Adapt, Create
Tiered funding
- Rolling cycle for applications
- Open to all with faculty appointment at UVA teaching 2,3,4 credit course(s)



How can the Library assist with your OER work?
Do you know your departmental liaison?



Join Us
for More!

[Copyright II: Media Use in OER](#) (May 4)
[Video Considerations for OER Creation](#) (May 5)
[Pressbooks](#) (May 18)

Questions? We are here to help!

Judith Thomas – Director of Faculty Programs

Bethany Mickel – Instructional Design & OER Librarian

Haley Gillilan – Student Success Librarian

[Learn more about OER at UVA](#)



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