

CAUL Open Educational Resources Professional Development Program: Foundations

CAUL OPEN EDUCATIONAL RESOURCES PROFESSIONAL DEVELOPMENT PROGRAM: FOUNDATIONS

COUNCIL OF AUSTRALIAN
UNIVERSITY LIBRARIANS

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CONTENTS

Acknowledgment of Country	xi
Accessibility Information	xii
Version History	xix
Introduction	1
Contributors	3
Attributions	iv

Part I. Part 1: An Introduction to OER

1. OER: What they are and why you should find out more!	7
2. Benefits of OER	22
3. OER initiatives	48

Part II. Part 2: Open Licensing and Copyright

- | | |
|--|----|
| 4. An introduction to open licensing and the public domain | 61 |
| 5. Attribution and using copyright material in OER | 85 |

Part III. Part 3: Finding OER

- | | |
|----------------------------|-----|
| 6. Preparing to locate OER | 113 |
| 7. OER search tools | 124 |
| 8. Evaluating OER | 138 |

Part IV. Part 4: Adapting and Creating OER

- | | |
|--|-----|
| 9. Adopt, adapt or create? | 151 |
| 10. Tools and techniques for working with OER | 175 |
| 11. Equity, diversity, inclusion and accessibility | 190 |

12. Publishing and sharing your OER	206
Glossary	223
Acknowledgements	232

ACKNOWLEDGMENT OF COUNTRY

The Council of Australian University Librarians (CAUL) acknowledges the Traditional Custodians of country throughout Australia and Aotearoa/New Zealand and their connections to land, sea and community. Further, we acknowledge the cultural diversity of Aboriginal and Torres Strait Islander peoples and pay respect to Elders past, present and future. We also recognise Māori as tangata whenua and embrace Te Tiriti o Waitangi recognising Māori as tino rangitiratanga of Aotearoa/New Zealand.

We celebrate the continuous living cultures of Indigenous peoples in Australia and Aotearoa/New Zealand and acknowledge the important contributions they have made and continue to make to society.

ACCESSIBILITY INFORMATION

We believe that education should be available to everyone, which means supporting the creation of free, open, and accessible educational resources. We are actively committed to increasing the accessibility and usability of the open texts and resources we produce.

Accessibility Features of the Web Version of this Resource

The web version of this resource has been designed with accessibility in mind and incorporates the following features:

- Designed to consider the needs of people who use screen reading technology.
 - All content can be navigated using a keyboard.
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 - Images have alt tags.
- Information is not conveyed by colour alone.

Other File Formats Available

In addition to the web version, this book is available in several file formats, including PDF, EPUB (for ereaders), and various editable files. Choose from the selection of available file types from the ‘Download this book’ dropdown menu. This option appears below the book cover image on the [eBook’s landing page](#).

Third-Party Content

In some cases, our open texts include third-party content. In these cases, it may not be possible to ensure the accessibility of this content.

Accessibility Assessment

Below is a short accessibility assessment of key areas that have been assessed during the production process of this open text. The checklist has been drawn from the [BCcampus Open Education Accessibility Toolkit](#). While a checklist such as this is just one part of a holistic approach to accessibility, it is one way to begin our work on embedding good accessibility practices in the books we support.

We hope that by being transparent on our current books,

we can begin the process of making sure accessibility is top of mind for all authors, adopters, students and contributors of all kinds on all our open-text projects. As such, we welcome any feedback from students, instructors or others who encounter the book and identify an issue that needs resolving.

Accessibility Checklist

Category	Item	Status
Organising Content	Content is organised under headings and subheadings	Yes
Organising Content	Headings and subheadings are used sequentially (e.g. Heading 1, Heading 2, etc.)	Yes
Images	Images that convey information include Alternative Text (alt-text) descriptions of the image's content or function	Yes
Images	Graphs, charts, and maps also include contextual or supporting details in the text surrounding the image	Yes
Images	Images, diagrams, or charts do not rely only on colour to convey important information	Yes
Images	Purely decorative images contain empty alternative text descriptions. (Descriptive text is unnecessary if the image doesn't convey contextual content information)	Yes
Tables	Tables include column headers and row headers where appropriate	Yes
Tables	Tables include a title or caption	Yes
Tables	Tables do not have merged or split cells	Yes
Tables	Tables have adequate cell padding	Yes

Weblinks	The web link is meaningful in context, and does not use generic text such as “click here” or “read more”	Yes
Weblinks	External web links open in a new tab. Internal web links do not open in a new tab.	Yes
Weblinks	If a link will open or download a file (like a PDF or Excel file), a textual reference is included in the link information (e.g. ‘[PDF]’)	Yes
Embedded Multimedia	A transcript has been made available for a multimedia resource that includes audio narration or instruction	–
Embedded Multimedia	Captions of all speech content and relevant non-speech content are included in the multimedia resource that includes audio synchronised with a video presentation	All videos except one third-party video have closed captions.
Embedded Multimedia	Audio descriptions of contextual visuals (graphs, charts, etc.) are included in the multimedia resource	No
Formulas	Formulas have been created using MathML	–
Formulas	Formulas are images with alternative text descriptions if MathML is not an option	–
Font Size	Font size is 12 points or higher for body text	Yes
Font Size	Font size is 9 points for footnotes or endnotes	–

Font Size	Font size can be zoomed to 200%	Yes
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Accessibility Improvements

While we strive to ensure this resource is as accessible and usable as possible, we might not always get it right. We are always looking for ways to make our resources more accessible. If you have problems accessing this resource, please contact us to let us know so we can fix the issue.

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VERSION HISTORY

This page provides a record of edits and changes made to this book since its initial publication. Whenever edits or updates are made in the text, we provide a record and description of those changes here. If the change is minor, the version number increases by 0.1. If the edits involve substantial updates, the edition number increases to the next whole number.

The files posted alongside this book always reflect the most recent version. If you find an error in this book, please let us know.

Version	Date	Change
1.0	04/ 03/ 2024	Original book published to coincide with Open Education Week 2024.

INTRODUCTION

This book contains the self-paced learning materials used within the facilitated Council of Australian University Librarians (CAUL) Open Educational Resources (OER) Professional Development (PD) Program: Foundations. The text is presented in a modular structure consisting of four Parts:

- An Introduction to OER
- Open Licencing, the Public Domain and Copyright
- Finding OER
- Adapting and Creating OER

Although some chapters contain more advanced content, the content is primarily foundational and is best suited to those seeking an introduction to using OER in the Australian and Aotearoa New Zealand higher education contexts. Each chapter contains identified learning outcomes to explain what the reader will learn, and a range of content resources, including readings, vidoes, interactive exercises and reflection activities.

Please note that the facilitated CAUL OER PD Program includes opportunities for engagement with program

participants and facilitators that are not included here, such as live guest expert speakers, discussion forums, and the option to apply theoretical learning through a Project Worksheet. We recommend any reader seeking an enhanced learning experience join the next OER PD Program (Foundations) run by CAUL.

CONTRIBUTORS

The content in this book was developed by members of the CAUL Open Educational Resources Professional Development Project team:

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The team drew heavily on existing materials, standing on the shoulders of many OER giants to adopt and adopt openly licensed materials in creating this OER. Specific references and copyright statements are included at the end of each chapter, where applicable.

ATTRIBUTIONS

Attributions

The icons used throughout this book are adapted from icons sourced from The Noun Project and used under a Noun Pro licence, which means attribution is not required. In the spirit of this book, we are sharing attributions regardless.

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PART I

PART 1: AN INTRODUCTION TO OER

1.

OER: WHAT THEY ARE AND WHY YOU SHOULD FIND OUT MORE!

Learning outcomes

By the end of this chapter, you will be able to:

- Define open educational resources (OER) and detail the characteristics of OER
-

Key OER definitions

What are OER?

Open educational resources (OER) are learning and teaching materials that are either in the public domain or have been released under an open licence. OER can be freely used, changed, or shared with others.

The term OER is used to refer to a wide range of materials such as textbooks, learning objects (quizzes, puzzles, games, etc.), images, video, music and audio clips, subject or course syllabi and even courseware.

Watch this video created by UNESCO which explains what an OER is based on the definition proposed by the UNESCO OER Recommendation (UNESCO, 2022).



Watch: Open Educational
Resources concept: What is an OER?
[0:57]



*One or more interactive elements has
been excluded from this version of the
text. You can view them online here:*

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=62#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.

Now we're going to look at the concept of the 5Rs and how they tie into the definition of OER.

The 5Rs

According to David Wiley's (n.d.) influential definition, a true OER is one that is "either (1) in the public domain or (2) licensed in a manner that provides everyone with free and perpetual permission to engage in the 5R activities."

Wiley describes these 5Rs as follows:

1. **Retain** – make, own, and control a copy of the resource (e.g., download and keep your own copy)
2. **Revise** – edit, adapt, and modify your copy of the resource (e.g., translate into another language)
3. **Remix** – combine your original or revised copy of the resource with other existing material to create something new (e.g., make a mashup)
4. **Reuse** – use your original, revised, or remixed copy of

the resource publicly (e.g., on a website, in a presentation, in a class)

5. **Redistribute** – share copies of your original, revised, or remixed copy of the resource with others (e.g., post a copy online or give one to a friend)

It's important to remember, however, that openness is always a scale. As we'll see when we look at Creative Commons licences, some open licences don't allow full engagement with the 5Rs – they may not permit revising or remixing, for example. Such resources are still OER – still free to download, use, and share – but do not meet the gold standard of 'true' OER.

Nonetheless, the 5Rs have become a touchstone for definitions of OER.



Read: Defining the 'open' in open content and Open Educational Resources

Wiley's above definitions are published with a

Creative Commons Attribution licence on his [blog post](#).

Now let's consolidate our understanding of OER by watching the first few minutes of this visual explanation on the basics of OER. Please watch to 2:17 mins.



Watch: Understanding OER
[Watch up to 2:17]



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Now that you have an understanding of what an OER is, we're going to look at how OER relate to the concept of Open Educational Practice (OEP).

Open Educational Practices

Open Educational Practices (OEP) are often discussed in relation to OER and the open education ecosystem. Although definitions of OEP vary, an oft-cited one by Ehlers (2011, p. 4) reads:

OEP are defined as practices which support the (re)use and production of OER through institutional policies, promote innovative pedagogical models, and respect and empower learners as co-producers on their lifelong learning path.

OEP thus supports and draws on high quality OER for collaborative and flexible learning. Beyond content production, they provide an environment where open access to educational content and services are the accepted norm.

Such practices may include open pedagogies, the development and use of OER, sharing a range of materials

and knowledge, and integrating openness throughout the classroom

Before we move on there is a final concept that it's important to define to avoid confusion: what is *not* an OER.

What is *not* an OER

If a resource is not free and openly licensed, it cannot be described as an OER. For example, most materials accessed through a library's subscriptions cannot be altered, remixed, or redistributed and therefore cannot be considered "open."

OER are not the only educational materials to be found on the Web. Unfortunately, most resources on the Internet are closed resources, even if they are available for free. Materials that are under full copyright, or which are not accompanied by a specific licence allowing anyone to copy, adapt and share them, are not OER. You can use these materials only within the copyright exceptions in your country.

Digital Rights Management (DRM) systems allow publishers and vendors to impose limitations on the sharing and use of digital material. DRM are common for ebooks and videos. DRM-free resources eliminate such limitations and can be opened with ease on a range of devices and apps, and the files can be freely shared, edited, and reformatted – although copyright and licence conditions will apply. Most of the

electronic journal articles we access through our subscriptions are DRM-free. However, although OER are all free of DRM, when we talk about “DRM-free resources” we’re referring to those that involve a cost – a cost usually borne by library subscriptions, in the tertiary education context. Unlike open access material, DRM-free material is still *paywalled*. Thus, unlike OER, DRM-free resources are *not openly licensed* and cannot be reused, revised, remixed, or redistributed, without breaching copyright (unless permissions are obtained).

Watch the below video explaining the difference between OER and DRM-free resources.



Watch: OER & DRM Free
Resources [3:20]



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OER glossary

There is a range of language and terminology used in the world of OER. We've introduced you to some key terms in this chapter, but to assist you across the coming chapters, at the end of the book there is a [glossary of terms](#) that you can refer to at any time.



Do: Drag and drop

Complete the below drag and drop so you can see how well you are grasping the content we've covered so far.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=62#h5p-1>

So, now we know what OER are (and what they are not!), but why are OER and OEP important?

Watch the below video to start thinking about open education and why it matters.



Watch: Why Open Education Matters [2:28]



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The open education movement was originally inspired by the open source community, with a focus on broadening access to information through the use of free, open content. The William and Flora Hewlett and Andrew W Mellon foundations are credited with starting the OER movement in 2001 when they co-funded MIT's [OpenCourseWare \(OCW\)](#)

[initiative](#) (Brown & Adler, 2008). The following year in 2002, participants at UNESCO’s Forum on the Impact of Open Courseware for Higher Education in Developing Countries expressed their “wish to develop together a universal education resource available for the whole of humanity, to be referred to henceforth as Open Educational Resources” (UNESCO, 2002, p. 28).

Following the rise of open education in the early 2000s, growing interest in Massive Open Online Courses (MOOCs), open courseware, and particularly open textbooks, catapulted the movement to new heights. Thousands of organisations across the world have joined the movement and contributed their own OER; however, there are still many instructors who have never heard of OER today.



Do: Explore OER Commons

[OER Commons](#) is a freely accessible online library of open educational resources and other freely available instructional materials. Explore the [OER](#)

[Commons](#) to start getting a sense for OER and the possibilities.

Key takeaways

We've reached the end of Chapter 1! Together we've dipped our toes into the world of OER, what they are, and why they matter. We hope this has whet your palette and got you excited for the coming chapters in which we'll be taking a deep dive into the world of OER.

In Chapter 2 we'll be taking a closer look at the importance and benefits of OER for learning and teaching, barriers to their adoption and arguments against, and how libraries fit into the picture!

References

Brown, J., & Adler, R. (2008). *Minds on Fire: Open Education, the Long Tail, and Learning 2.0*. *EDUCAUSE Review*, 43 (1), 16-32.

UNESCO. (2002). Forum on the Impact of Open Courseware for Higher Education in Developing Countries, UNESCO, Paris, 1-3 July 2002: final report. <https://unesdoc.unesco.org/ark:/48223/pf0000128515>

Ehlers, U-D. (2011). Extending the territory: From open educational resources to open educational practices. *Journal of Open, Flexible and Distance Learning*, 15(2). <https://www.jofdl.nz/index.php/JOEDL/article/view/64>

Wiley, D. [n.d]. [Defining the “Open” in Open Content and Open Educational Resources](https://opencontent.org/definition). <https://opencontent.org/definition>.

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- Module 1: What are OERs? from [Introduction to Open Educational Resources \(OERs\): A professional development program for Scholarly Services staff](#) by Zachary Kendal & Amy Perkins, University of Melbourne Library, licensed under a [CC BY-SA 4.0](#)

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- [Open Educational Resources Mythbusting](#) by Karolina Grodecka and Kamil Sliwowski, licensed under [CC BY 4.0 licence](#).

2.

BENEFITS OF OER

Learning outcomes

By the end of this chapter, you will be able to:

- Describe the benefits and opportunities of OER for teaching and learning
 - Understand the challenges and arguments against OER
 - Identify how libraries and you can support open education and the OER movement
-

We started thinking about the significance of OER and why they are important in Chapter 1. Now we're going to explore the benefits of OER in more depth, considering a) their significance from a social justice perspective and b) the opportunities that arise from their flexibility.

OER, social justice and equity

OER provide a level of social justice to education. The current for-profit model of educational publishing offers no such relief. Dr Sarah Lambert (2018) identifies three main ways in which OER provide social justice: *redistributive* justice, *recognitive* justice, or *representational* justice:

Redistributive justice is the most long-standing principle of social justice and involves allocation of material or human resources toward those who by circumstance have less. Recognitive justice involves recognition and respect for cultural and gender difference, and representational justice involves equitable representation and political voice.

Let's explore each of these in more depth, with some examples.

Redistributive justice

Like in the US, the cost of textbooks has increased in Australia, leaving many students struggling to afford them (Nagle & Vitez, 2020; Lambert & Fadel, 2022). In the past, students could avoid buying textbooks when libraries kept multiple copies of required texts for loan. In this new age of ebooks and online learning, however, publishers have been able to subvert traditional library models. Limits on simultaneous ebook users, inability to download content for offline reading, and

cumbersome DRM make avoiding textbook costs increasingly difficult (Lambert & Fadel, 2022).

OER reduce the cost barrier to people from lower socioeconomic circumstances who struggle to afford educational materials. A US study showed improved outcomes for students from poor and minority backgrounds when OER were adopted. Not only did the students' grades improve, but so did course retention rates (Colvard, Watson & Park, 2018).

The COVID-19 pandemic has worsened the pressures on all student populations, especially those from existing underprivileged student populations. From food insecurity to precarious work, COVID has exacerbated existing economic challenges. The use of OER has gone some way to lessening the burden faced by students (DeRosa, 2020).



Do: Textbook cost activity

We know that textbooks costs can be astronomical, but it can be hard to fully grasp the impact moving to an OER can have. So, let's do the maths! Download this [interactive PDF](#).

Now let's consider the second form of social justice identified by Dr Lambert (2018): recognitive justice.

Recognitive justice

OER allow the recognition of groups and individuals often excluded from the academic sphere.

Textbooks by established experts often fail to incorporate knowledge and experiences from minority and underrepresented groups. However, OER with more open Creative Commons licences can be modified or expanded to foreground the work of under-represented people, including Indigenous peoples and LGBTQI+ individuals.

For example, textbooks in STEMM (Science, Technology, Engineering, Mathematics and Medicine), which have historically neglected women's contributions in the fields, can benefit from examples that highlight women's research and practice. Similarly, medical textbooks have long suffered from a lack of diversity, with very little representation of people of colour.

Likewise, recognition of Indigenous knowledges, practices, and languages in OER can also reduce the cultural and linguistic barriers often experienced by First Nations students (Funk & Guthadjaka, 2020).

English has become a *global lingua franca*, yet most of the

world's population does not speak it as a first language, if at all (Karakaya & Karakaya, 2020). Most OER are produced in English, and translation efforts are slow going. So, while there is potential for equality of access, the reality is that more needs to be done.

The third way OER provide social justice as identified by Dr Lambert is representational justice.

Representational justice

Related to recognitive justice, representational justice allows marginalised groups to tell their own stories. Lambert and Fadel (2022) clarify the distinction between the two thus:

*we think of **recognitive justice** as ensuring you can see diversity ... and **[representational] justice** as ensuring you can hear diverse points of view and knowledges*

The current academic publishing model, like higher education as a whole, tends to privilege the voices that have historically dominated scholarly discourse. The perspectives offered by these established experts, however, may not reflect the lived experience of a diverse and multicultural student cohort.

In their creation and adaptation, OER can allow greater inclusion of underrepresented voices. Openly licensed OER can be modified to suit different contexts and include different

kinds of knowledge, enriching the resource with diverse perspectives.

Democratising the textbook creation process through OER models removes commercial, and sometimes even political, influences (Nusbaum, 2020). Allowing marginalised communities power to create and edit texts facilitates social justice through greater representation.

Greater representation is not a guaranteed outcome, however. It can only occur by considering context and actively engaging with different communities.



**Watch: Open Education Matters:
Why is it important to share content?
[3:31 mins]**

The video below further explains the social and equity benefits of OER.





One or more interactive elements has been excluded from this version of the text. You can view them online here:
<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=66#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.

The flexibility of OER

The ease with which many OER can be edited and maintained gives educators a lot of flexibility. Let's explore some of the benefits of OER flexibility.

Continual improvement of OER content

As open digital resources, OER can be easily edited and updated, without the educator having to find an alternative

textbook or create a whole new resource. Freedom from fixed, unalterable resources allows educators greater freedom to revise or expand content to suit their curriculum.

For example, an OER could be:

- updated when new discoveries are made, or when new policies are introduced;
- revised or expanded in response to student feedback; or
- converted to new digital formats as required.

Another way that OER can be revised and expanded is by localising the content.

Incorporating local perspectives

As we saw when we discussed social justice, existing textbooks may have an international focus and miss the local context. Canada and the US have a head start on the production and use of OER, but their geographic and social contexts do not always translate well to Australia or Aotearoa New Zealand.

OER can be revised to be made more relevant to local conditions. Resources that refer to overseas policy environments – for example: healthcare or financial systems – can be adapted to fit our own.

In line with representational justice, OER can allow local

voices to be heard. A case study of the Indigenous and Intercultural Health unit at La Trobe University, for example, showed the need for educational resources to be relevant to the targeted community. Ordinary health science programs offered were not gaining traction in Indigenous communities until Indigenous culture, language, and experiences were incorporated into the curriculum via an open-source platform (Hannon, Huggard, Orchard, & Stone, 2014).



Watch: Importance of OER [3:14 mins]

Watch this video to hear James Glapa-Grossklag, the Dean of Educational Technology from the College of the Canyons in Southern California talks about the importance of Open Educational Resources during a visit to RMIT.





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Note: Closed captions are available by clicking on the CC button in the video.

Now let's consider how the flexibility of OER enables partnerships with students.

Partnership with students

OER can also support active learning by allowing students to be involved in the creation and assessment of OER, not just by passively using them (Elder, 2021). After all, OER with more open Creative Commons licences grant permission for *all* users, including students, to be involved in the SR

activities: retain, reuse, revise, remix and redistribute (see [Chapter 1](#)).

For example, students could develop case studies which, with their permission, could be reused as OER for other learners. The OER ebook [*Cultural Knowledges and Work Integrated Learning*](#), is one such resource. Published on Pressbooks by Charles Darwin University under a CC BY-NC-ND licence, this book is an “iteratively compiled” collection of students’ case studies on cultural capability. Further examples have recently been highlighted by Travis Wall for Pressbooks: [“Student-led OER to inspire and engage your class.”](#)

Global OER contexts

On top of the benefits outlined already, OER offer some important benefits to global education. Unlike proprietary teaching materials and textbooks, OER can be:

- freely translated into other languages;
- adapted to suit local national contexts and histories; or
- enhanced with culturally relevant examples.

Perhaps most importantly, OER can be used freely by institutions with limited financial resources, including those

in developing countries, while opening up education to more students.

Watch the video below to find out more about how OER are building inclusive knowledge societies and helping achieve the United Nations (UN) Sustainable Development Agenda.



Watch: Open Educational Resources (OER) and innovation: Why OER? [1:17 mins]



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Do: Knowledge check quiz



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<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=66#h5p-2>

We've considered the many benefits of OER, focusing on the strong social justice motivations and the advantages gained through their flexibility. However, as with every great movement, there are some barriers and arguments against the OER movement that are worth being aware of and considering.

Barriers to using OER, arguments against

There are some barriers to OER and their widespread adoption, which are important to be aware of. They include concerns like:

- The quality of available OER materials may be inconsistent
- Materials may not meet accessibility requirements and must be modified to bring into compliance
- There is no common standard for the review of OER accuracy and quality, and therefore you need to check accuracy of content
- Customisation may be necessary to match departmental and/or college curriculum requirements
- Technology issues – not all students will be able to access digital resources or have access to required software
- OER may be delivered via platforms that are not open, so they are not discoverable or accessible, or cannot be reused easily by others
- The language of dissemination – many OER are limited to English (Mishra et al., 2022).
- Student readiness and willingness to participate (Pearce et al., 2022).

Studies into barriers to the use of OER by university teaching

staff have found key barriers to be (Hassell & Lewis, 2017; Belikov & Bodily, 2016; Schuwer & Janssen, 2018; Schuwer, Kreijns, & Vermeulen, 2014):

- Lack of awareness and lack of understanding, including confusing OER with any digital resources
- Lack of time and motivation
- Lack of discoverability
- Lack of institution wide policy and directive from leadership

As posited by McGill (2013), many of these may be “perceived barriers” or “anticipated barriers” that are “not as real as imagined or that have been lessened by new developments, such as the introduction and wide scale adoption of Creative Commons Licences”.



Read: OER myth busting

As part of the [Open Educational Resources Policy in Europe](#) project, Creative Commons put together an

excellent document on [Open Educational Resources Mythbusting](#). See pages 14-35 for busting of common OER myths.



Reflect: Barriers to OER

Consider your own organisation. What do you think some challenges and barriers to OER and their adoption could be? How do you think you could address them?

We've explored how OER are such a powerful social justice tool and considered the benefits of their flexibility for teaching and learning in general, but what does this all look like in practice? Watch the following videos to see how academics can and have been bringing OER into their classroom:



Watch: Open Education in Practice: Integrating OER Into Your Course [4:27 mins].

Watch this video to see how OER might be embedded into teaching.



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=66#oembed-4>

Note: Closed captions are available by clicking on the CC button in the video.



Watch: Open Educational Resources: Adopting an Open Course [5:20 mins]

Watch this video to hear from academics about their experience of adopting OER.



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Note: Closed captions are available by clicking on the CC button in the video.

We've seen how academics can and have started bringing OER into their classrooms and capitalising on the freedoms and benefits of OER to provide a dynamic and learner-oriented

learning experience for their students. Now let's look into our role in this game: how libraries and we as librarians can engage with and support OER. We'll start by looking more generally at how librarians are perfectly placed to support the broader Open Education movement, before looking at support for OER specifically.



Watch: Libraries and the Open Education Movement [3:55 mins]

Watch this video on how libraries can and do contribute to the OE movement.



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<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=66#oembed-6>

Note: Closed captions are available by clicking on the CC button in the video.



Read: How libraries and librarian can lead OER

Read through this [LibGuide page](#) developed by University of Toronto Library on how can Librarians and Libraries Lead OER [approx 5 min].

So we've started thinking about how librarians can support OER, now let's hear from an Australian academic as they share their experience of OER and how librarians have contributed to their OER journey.



Watch: Finding quality Open Educational Resources [1:52 mins]



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=66#oembed-7>

Note: Closed captions are available by clicking on the CC button in the video.



Reflect: Supporting OER as part of your role

What are some of the ways through which you think you do or could support your institution with applying OER?

Key takeaways

In this chapter we saw that OER have the potential to transform education. They reduce financial barriers and enable greater representation of marginalised peoples and diverse voices. They also allow a flexibility in the teaching process that is not possible using traditional textbooks. In Chapter 3 we'll be considering OER initiatives around the world and at home in Australia and Aotearoa New Zealand.

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- [Introduction to Open Educational Resources](#) by Judy Baker, licensed under a [CC BY 2.0 licence](#).
- Module 2: Benefits of OERs from [Introduction to Open Educational Resources \(OERs\): A professional development program for Scholarly Services staff](#) by Zachary Kendal & Amy Perkins, University of Melbourne Library, licensed under a [CC BY-SA 4.0 licence](#)

3.

OER INITIATIVES

Learning outcomes

By the end of this chapter, you will be able to:

- Build an awareness of significant OER initiatives around the world and in Australia
-

In [Chapter 2](#) we considered the global benefits of OER: how they can be translated into other languages, adapted for local context, enhanced with culturally relevant examples, and how they can open up education to more students. The global benefits of OER have shaped UNESCO's advocacy for OER as a means of overcoming inequality in education. Let's take a closer look at their influential initiatives.

The UNESCO OER initiatives

Back in [Chapter 1](#) we touched on how the term OER was first

adopted at UNESCO's 2002 Forum on the Impact of Open Courseware for Higher Education in Developing Countries funded by the Hewlett Foundation. Since then UNESCO have led several OER initiatives and taken a leadership role in making countries aware of the potential of OER.

In 2012, UNESCO convened a World Open Educational Resources Congress in Paris. This resulted in the [2012 Paris OER Declaration](#), which “calls on governments worldwide to openly license publicly funded educational materials for public use” (UNESCO, n.d.).

In 2019, the [UNESCO OER Recommendation](#) was adopted. It outlines five Areas of Action:

1. Building the capacity of stakeholders to create, access, re-use, adapt and redistribute OER;
2. Developing supportive policy for OER;
3. Encouraging inclusive and equitable quality OER;
4. Nurturing the creation of sustainability models for OER; and
5. Promoting and reinforcing international cooperation in OER.

Through its recommendations, UNESCO hopes to make OER the norm worldwide.

In March 2020, UNESCO launched the [OER Dynamic Coalition](#) to support the implementation of their

recommendations. You can find out more about UNESCO's OER initiatives on their [OER website](#).

Watch this video to hear from educators about their perspectives on the UNESCO OER Action Area:



Watch: Open Educators reflect on the UNESCO OER Action Area: Building Capacity [5:50 mins]



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=68#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.

Beyond UNESCO's work, other global initiatives have sought

to increase awareness and uptake of OER. Let's take a look at some of these now.

OER initiatives around the world

Here are some key initiatives:

- [Open Education Global](#) is a global non-profit that supports the development and implementation of open education around the world. One of their key areas of focus is OER, although they also advocate for MOOCs, open educational practices, and aspects of open research. Each year they coordinate [Open Education Week](#).
- In [Chapter 1](#) we briefly looked at [OER Commons](#) which was launched by [Institute for the Study of Knowledge Management in Education](#) (ISKME) in 2007 with a grant from the William and Flora Hewlett Foundation. This freely accessible online library of open educational resources facilitates easy discovery of OER.



Do: Explore key OER initiatives

The University of Melbourne have created an interactive OER World Map of the key OER initiatives from around the world. Click through the location markers on the map below.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=68#h5p-3>

We've looked at major OER initiatives around the world. Now let's turn our gaze to our own backyard: what does the OER movement look like in Australia?

Australia's place in the global OER landscape

Unfortunately, Australia has tended to lag behind in most aspects of open research, and this applies to the OER landscape as well.

Currently, Australia lacks a national open agenda or vision for open scholarship, with no policies that would promote, support, or require any use of OER. Thus Stagg et al. (2018) found that a “lack of policy levers has provided little incentive for Australian Higher Education institutions to explore OEP.”

However, there is hope that this will change in the near future, prompted by the work Chief Scientist Dr Cathy Foley has done towards [An Australian Model for Open Access](#). This model may have follow-on benefits in the OER space, since OER textbooks and other materials often draw from open access research.

Meanwhile, individual universities have led some significant OER initiatives, including the publication of open access academic books and textbooks by their university presses or university libraries. Examples include:

- [ANU Press](#), the largest fully open access university press in the world
- [UTS ePRESS](#)
- The La Trobe University [eBureau](#)
- Sydney University Press's [Sydney Open Library](#)

- The University of Southern Queensland's [Free and Open Textbooks](#)

Other noteworthy Australian OER initiatives include:

- Led by Dr Sarah Lambert (Deakin University), the [Australian Open Textbooks Project](#) has investigated open textbook use in Australia, with a focus on social justice. Their final report, [Open Textbooks and Social Justice: A National Scoping Study](#), was published by the National Centre for Student Equity in Higher Education (NCSEHE) in February 2022
- Some universities offer grants for the development of OER. Recent examples include [Deakin University](#) and the [University of Southern Queensland](#)
- The Northern Institute at Charles Darwin University developed an open [Indigenous Fisheries Training Framework](#), including a series of [OER training videos from Warruwi](#). All content is openly licensed as CC BY-NC-SA
- The Australian Political Studies Association recently worked with Sydney University Press to develop an OER textbook, *Australian Politics and Policy*, which has both a [Senior Edition](#) and a [Junior Edition](#).

In the university library context, OER have been embraced by the [Digital Dexterity Community of Practice](#), an initiative by

the Council of Australian University Librarians (CAUL) and Council of New Zealand University Librarians (CONZUL). Their OER Commons group, [Digital Dexterity Educators](#), is open to all and hosts OER focusing on digital literacy designed by members.

CAUL's [Enabling a Modern Curriculum Program](#) was launched in late 2020. OER are a key focus area for the program, and the OER professional development program from which this publication was developed is one of three OER focused projects to come out of it. Read more about the program and each project on [CAUL's website](#).



Do: Optional activity

Take a look at the CAUL Enabling a Modern Curriculum [blog](#) and subscribe to receive regular updates on the program and about other topics related to the theme of enabling a modern curriculum.

Key takeaways

Across Part 1 we have explored:

- how to define open educational resources (OER) and detail the characteristics of OER
- the benefits and opportunities of OER for teaching and learning
- the challenges and arguments against OER
- how libraries and you can support OER

We finished Part 1 by looking at all the fantastic OER initiatives happening around the world and more locally in Australia. We hope that they have sparked your imagination and got you thinking about how you could apply these ideas to your own work.

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<https://en.unesco.org/oer/paris-declaration>

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PART II

PART 2: OPEN LICENSING AND COPYRIGHT

4.

AN INTRODUCTION TO OPEN LICENSING AND THE PUBLIC DOMAIN

Learning outcomes

By the end of this chapter, you will be able to:

- Identify open licences and define the public domain
 - Understand and implement the Creative Commons licences
-

Open licensing

What is an open licence?

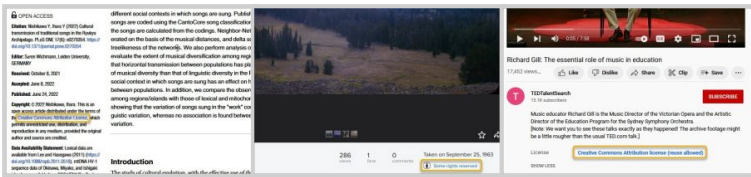
A licence is a document that specifies what can and cannot be done with a work – whether sound, text, image or multimedia. It grants permissions and states restrictions. Broadly speaking,

an open license is one which grants permission to access, re-use and redistribute a work with few or no restrictions (Open Knowledge Foundation, n.d.).

You can identify resources with an open licence by a notice that will be displayed with the work, stating which licence it has been released under, with a link to the licence. See figures 4.1-4.6 below.

The most widely used open licences are Creative Commons (CC). However, it is important to know that there are other types of open licences which you may come across. Some examples are open source software licences, such as the [GNU General Public Licence](#), which can also be used for material. Also, bespoke open licences, such as those used by the stock photography platforms [Unsplash](#) and [Pixabay](#), are other examples. In this book, we will be focusing on Creative Commons.





Figures 4.1-4.6: 1. [*A Guide to the Gothic*](#) by Jeanette A. Laredo, [CC BY 4.0](#); 2. [*Department of Education Copyright Webpage*](#) by Commonwealth of Australia, [CC BY 4.0](#); 3. [*Green cactus by rocky mountain during daytime*](#) by George Pagan III, [Unsplash licence](#); 4. [*Cultural transmission of traditional songs in the Ryukyu Archipelago*](#) by Yuri Nishikawa and Yasuo Ihara, [CC BY 4.0](#); 5. [*Elk Hunt – Montana*](#) by David Wipf, [CC BY 2.0](#); 6. [*The essential role of music in education*](#) by Richard Gill, [CC BY 3.0](#).

Creative Commons (CC)

Creative Commons is a nonprofit organisation that was founded in 2001. They publish a set of free, public licences that give everyone from individual creators to large companies and institutions a clear, standardised way to grant permission to others to use their work. Watch the following video to learn how Creative Commons (CC) licences work.



Watch: Creative Commons licence explained [5:32 mins]



*One or more interactive elements has
been excluded from this version of the
text. You can view them online here:*

[https://oercollective.caul.edu.au/caul-open-
educational-resources-professional-development-
program/?p=32#oembed-1](https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=32#oembed-1)

Note: Closed captions are available by clicking on
the CC button in the video.



Reflect: Creative Commons licensing

Have you ever used a Creative Commons licensed work before? Did you find it easy to understand what you could and could not do with the work?

Licence design

CC licences function within copyright law, granting permissions for as long as the underlying copyright lasts or until the licence terms are violated. Although they're legally enforceable, they have been designed in a way to make them accessible to non-lawyers.

The licences are built using a three-layer design (as shown in **Figure 4.7**):

1. The **legal code** contains the “lawyer-readable” terms and conditions that are legally enforceable in court.

2. The **commons deeds** are the web pages that summarise the legal code, laying out the key licence terms in so-called “human-readable” terms.
3. The “**machine readable**” layer is a summary of the key freedoms granted and obligations imposed written into a format that applications, search engines, and other kinds of technology can understand. When this metadata is attached, CC licenced works are more discoverable.



Figure 4.7: [Three Layers of License](#) by Nathan Yergler and Alex Roberts, licensed under a [CC BY 3.0 licence](#).

Licence elements

Creative Commons (CC) licences are made up of elements that tell users how the work can be used. There are four possible elements, which are outlined below:





	BY – Attribution	Credit must be given to the creator.
	SA – Share Alike	Adaptations must be shared under the same terms.
	NC – Non-Commercial	Only non-commercial uses of the work are permitted.
	ND – No Derivatives	No derivatives or adaptations of the work are permitted.

Table 4.1: Licence elements by University of Melbourne Library, licensed under a [CC BY-SA 4.0 licence](#).

Sometimes people can be confused about what a non-commercial use or an adaptation is. These are explored in more detail below.

Non-Commercial

The legal code of the licence defines a non-commercial purpose as one that is “not primarily intended for or directed

towards commercial advantage or monetary compensation”. Note that the definition depends on the use, not the user. Visit the [CC NonCommercial Interpretation page](#) for more information and examples.

Adaptations

The no derivatives element prevents adaptations and the share-alike element requires adaptations to be shared under the same licence. What constitutes an adaptation is dependent on the applicable copyright law. In Australia, adaptations include creating a movie based on a book, translating a book into another language, and arranging music. The legal code of the licence also defines some specific uses as either adaptations or not.

While it can be tricky to determine exactly what is and is not an adaption, the following handy rules can help:

- Technical format shifting is NOT an adaption, e.g. digital to physical format
- Fixing minor problems with spelling or punctuation is NOT an adaption
- Syncing a musical work with a moving image IS an adaption
- Reproducing and putting works together into a collection is NOT an adaption, e.g., combining articles into an open textbook
- Including an image in a book, blog post, powerpoint, or

an article, is NOT an adaptation unless the image itself is adapted.

Licence types

There is no single CC licence. The licence elements – BY, SA, NC, ND – can be combined to make up six different licences. This provides a range of options for creators who wish to share their works.

The six licences, from least to most restrictive in terms of the freedoms granted users, are:



The **Attribution licence or “CC BY”** allows people to use the work for any purpose (even commercially and even in modified form) as long as they give attribution to the creator.



The **Attribution-ShareAlike licence or “BY-SA”** allows people to use the work for any purpose (even commercially and even in modified form), as long as they give attribution to the creator and make any adaptations they share with others available under the same or a compatible licence.



The **Attribution-NonCommercial licence or “BY-NC”** allows people to use the work for non-commercial purposes only, and only as long as they give attribution to the creator.



The **Attribution-NonCommercial-ShareAlike licence or “BY-NC-SA”** allows people to use the work for noncommercial purposes only, and only as long as they give attribution to the creator and make any adaptations they share with others available under the same or a compatible licence.



The **Attribution-NoDerivatives licence or “BY-ND”** allows people to use the unadapted work for any purpose (even commercially), as long as they give attribution to the creator.



The **Attribution-NonCommercial-NoDerivatives licence or “BY-NC-ND”** is the most restrictive license. It allows people to use the unadapted work for noncommercial purposes only, and only as long as they give attribution to the licensor.

Table 4.2: Creative Commons licence types

Public domain

There's a common misconception that everything freely available online is in the public domain – and sometimes the term is used interchangeably with *public sphere* to refer to publicly available knowledge or public discourse. However, when it comes to copyright, *public domain* means something very specific.

Material is in the public domain when no one holds copyright, and therefore, there are no copyright restrictions on how the material can be used. There are two main ways material enters the public domain: via copyright expiry or the CC0 Public Domain Dedication.

Copyright expiry

Copyright lasts a long time, but not forever. In Australia, copyright typically expires 70 years after the death of the creator, while in Aotearoa New Zealand it's currently 50 years after death. However, duration can vary depending on factors such as the type of material and copyright owner. Amendments to copyright law also mean that it can be difficult to determine if material has expired.

You can visit the following resources to help determine if copyright has expired in material:

- **Australia:** [Duration of copyright](#) and [Copyright term](#)

[flow charts](#) by the Australian Libraries and Archives Copyright Coalition

- **Aotearoa New Zealand:** [Duration of copyright](#) by the New Zealand Intellectual Property Office

While there is no central register of material in the public domain, Creative Commons has created a Public Domain Mark. This can be used to clearly indicate when something is in the public domain due to copyright having expired (or never been applicable).



The **Public Domain Mark** indicates that there is no known copyright in any jurisdiction.

Table 4.3: Public domain mark

It should be noted that most public domain material does not have this mark and you'll need to determine for yourself if copyright has expired in your jurisdiction. One reason for the limited use of the mark is that it's only meant to be applied to material which is in the public domain everywhere in the world, which is a high standard to prove.

CCo Public Domain Dedication

While copyright expiry was traditionally the main way material entered the public domain it is now also possible for creators to dedicate their material to the public domain.

Creators who want to take a “no rights reserved” approach and disclaim copyright entirely can use the Creative Commons public domain dedication tool (CC0). This is different from the CC licences discussed in the last section as CC0 material has absolutely no conditions attached, you don’t even need to provide an attribution.



The **CC0 Public Domain Dedication** indicates that the creator has waived all of their rights to the work worldwide under copyright law.

Table 4.4: CC0 public domain dedication

Using openly licensed and public domain material in practice

Having read about the public domain and different CC licences, you now understand that some options are more open than others. The infographic below shows the spectrum of openness from the most to least open options

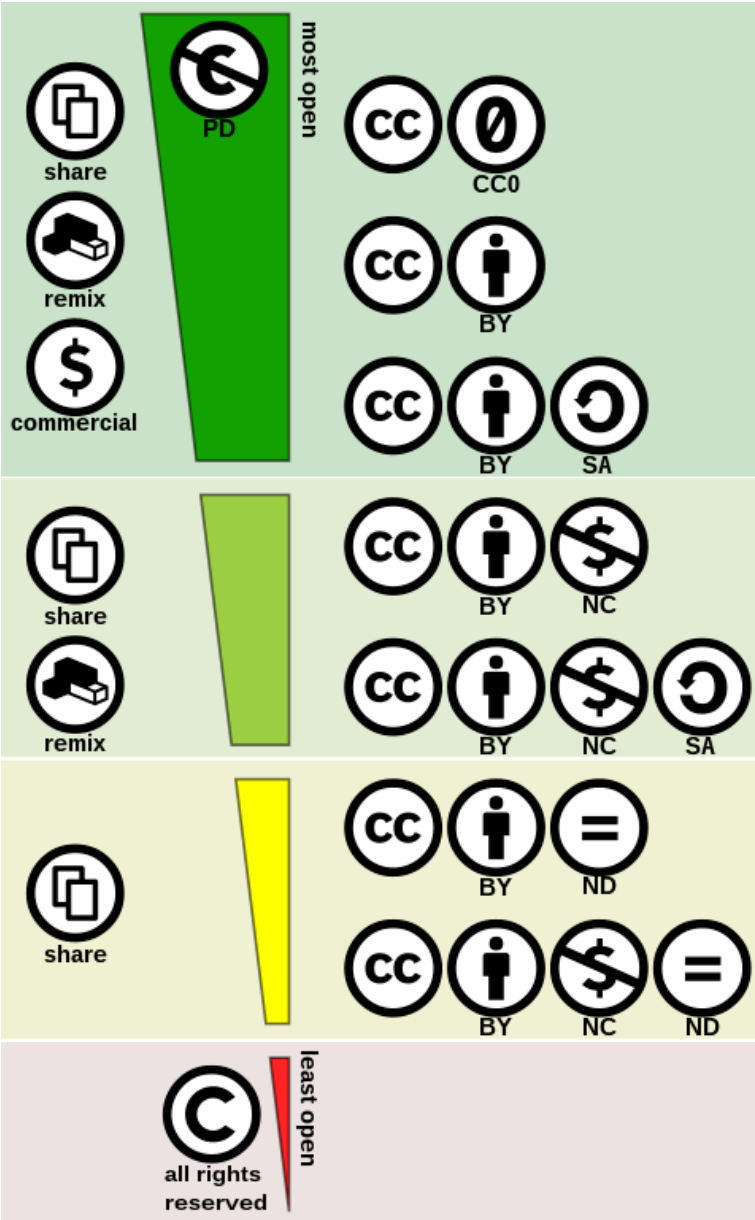


Figure 4.8: [Creative Commons license spectrum](#) by Shaddim, licensed under a [CC BY 4.0 licence](#).

Compatibility of licences

In an ideal world, you would always be able to find resources with the most open licences. However, you'll be more likely dealing with resources with different licences. This can be complicated as not all CC licences are compatible. For example, you cannot create a remix using works with a CC BY-SA licence, and a CC BY-NC-SA licence since both require the remixed work to be released under the same licence. The following chart can be used to help determine if resources with different licences are compatible.











	 PUBLIC DOMAIN	 PUBLIC DOMAIN	 CC BY	 CC BY-SA	 CC BY-NC	 CC BY-ND	 CC BY-NC-SA	 CC BY-ND-SA
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 CC BY	✓	✓	✓	✓	✓	✗	✓	✗
 CC BY-SA	✓	✓	✓	✓	✗	✗	✗	✗
 CC BY-NC	✓	✓	✓	✗	✓	✗	✓	✗
 CC BY-ND	✗	✗	✗	✗	✗	✗	✗	✗
 CC BY-NC-SA	✓	✓	✓	✗	✓	✗	✓	✗
 CC BY-ND-SA	✗	✗	✗	✗	✗	✗	✗	✗

Figure 4.10: [CC Adapter's Licence Chart](#) adapted from Creative Commons, licensed under a [CC BY 4.0 licence](#).

Copyright, the public domain, and open licensing are integral concepts related to OER. This is because copyright automatically applies to teaching and learning materials and typically prevents the 5Rs from being exercised. Specifically, copyright prohibits unauthorised:

- copying, which prevents the right to retain,
- public performance, which prevents the right to reuse,
- adaptations, which prevents the right to revise and remix,
- publication, which prevents the right to redistribute; and
- communication, which also prevents the right to redistribute.

In order for these rights to be allowed, material must be in the public domain or openly licensed. Even with an open licence, the conditions of certain licences may prevent some uses. It's therefore important that librarians have a good understanding of copyright and open licences if they are to lead or contribute to open education initiatives. With this knowledge you will be able to:

- find material with an open licence,
- identify material in the public domain,

- interpret and apply licence conditions; and
 - explain to others how public domain and openly licensed material can be used.
-



Reflect: Think about copyright and open licensing within your university context.

- Can you think of a situation in which you would need some basic understanding of copyright and open licensing in relation to your OER practice?
- How would you approach a complicated copyright or open licensing question which you didn't feel confident answering? What resources do you have at your disposal to help, e.g. internal/external information resources and/or experts?
- When advising others on how they can use

openly licensed resources, what would you need to consider?



Do: Copyright and open licensing quiz

This quiz will test your understanding of copyright, the public domain, and open licences in relation to open educational resources. Completing it will provide you with an opportunity to demonstrate your knowledge and identify any areas which may require review or clarification.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=32#h5p-5>



Read: Why, oh why, CC-BY?

This [blog post](#) outlines the experience of one librarian's decision to apply Creative Commons licences to her scholarly output.



Reflect: Switching licences

In the [blog post](#) above, Bethany Nowviskie discussed her decision for switching from using CC BY-NC licences to CC BY. Have you ever added a CC licence to something you have created? If so, what licence did you use and why? If you haven't licensed work previously would you feel comfortable using a CC licence in the future? If so, what licence and why?

Key takeaways

In this chapter we learnt that:

- Copyright automatically restricts how material can be used and generally inhibits the 5Rs.
- Material in the public domain can be used without restriction.
- Material can enter the public domain either through

copyright expiry or dedication.

- Copyright owners can apply an open licence to material.
- An open licence grants permission to use the material in certain ways along with any limitations and conditions.
- Some open licences are more open than others, with the most open license being CC BY and the most restrictive one being CC BY-NC-ND.
- The licence type dictates if resources can be remixed together, and what licence can be applied to adaptations.

Next chapter, we will discuss other ways you may be able to use material which isn't in the public domain or openly licensed. We'll also explore the concept of attribution in more detail.

References

- Australian Libraries and Archives Copyright Coalition (n.d.). *Duration of copyright*. Retrieved July 28, 2022 from <https://alacc.org.au/duration-of-copyright/>
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- [Creative Commons Certificate for Educators, Academic Librarians and GLAM](#) by Creative Commons, licensed under a [CC BY 4.0 licence](#)
- [Open definition](#) by Open Knowledge Foundation, licensed under a [CC BY 4.0 licence](#)
- [Find Open Content](#) by OER Africa, licensed under a [CC BY 4.0 licence](#)

5.

ATTRIBUTION AND USING COPYRIGHT MATERIAL IN OER

Learning outcomes

By the end of this chapter, you will be able to:

- Inform others of the basics of copyright in relation to open education
 - Provide attributions appropriate for a range of resources and uses
-

Using copyright material in OER

Material which isn't in the public domain or openly licensed is not recommended to be used in OER. This is fundamentally

because it doesn't meet the definition of an OER and copyright impacts the right to retain, reuse, revise, remix, and redistribute. That said, there are occasions where it may be necessary to use copyright material¹. For example, if you are working on an open textbook and need to include unique copyright material to explain a concept. This could be a quote from a literary work, an image from a seminal research paper, or an excerpt from a video.

Using copyright material in OER raises a number of issues. First of all it can only be used when it is legally allowed. This can be difficult to determine and take up a significant amount of time. The three strategies which may allow copyright material to be used are:

- Copyright exceptions
- Linking/embedding
- Permissions

These three strategies will be discussed in more detail later in this section.

Even when the use is legal, the copyright material will need to be carved out from the open licence that is applied to the

1. In this chapter we refer to “copyright material” as material which has all rights reserved to distinguish it from “openly licensed material”. However, as you know from the previous chapter, openly licensed material is also protected by copyright but for the sake of brevity we will use these terms.

OER. It's therefore important that the copyright material is clearly identified and that the open licence statement explicitly states that it is excluded. When different conditions are applied to separate components of an OER it makes it difficult for users to fully exercise the 5Rs. For this reason, it's preferable to avoid using copyright material wherever possible. Alternative public domain or openly licensed material can often be found, or material can be created from scratch.

Copyright exceptions

Both Australia and Aotearoa New Zealand copyright law contain exceptions that allow material to be used in specific circumstances. Unfortunately, most exceptions contain limitations that typically make them incompatible with OER. For example, under “fair dealing for research or study”, a person may be able to copy something for their own use, but they cannot share it with others. This means that the exception cannot be used since sharing is the most fundamental aspect of an OER.

In comparison, “fair dealing for criticism or review” and “fair dealing for parody or satire”, doesn't prevent the new material from being shared. However, universities have different approaches to Fair Dealing exceptions. If your university approves of such use, include a disclaimer/note in

your OER indicating that Fair Dealing has been applied to xx items and that they are excluded from the open licence of the OER.

If you're working on an OER project you should check what approach your university has adopted around exceptions and seek advice from your university copyright officer if you plan to rely on them.

Linking/embedding

If the material is available online you can choose not to exercise any copyright rights by providing a link, or possibly embedding it directly in your OER.

When you provide a link, people are directed to visit the original site where the material is hosted – no copy is made. You still need to be careful when providing links and avoid linking to:

- Illegitimate material: this is material which has been made available online without the copyright owner's permission.
- Material behind a paywall: this includes library subscription databases. While this is common practice within universities, it is important to remember that OER are not limited to an institutional cohort, so

anyone outside of the subscribed institution won't have access to the linked material.

- Material with other login requirements: even if there is no cost involved in creating an account, you should consider the privacy of users and if they will need to give up personal information to access the material.
- Unprofessional sites: such as sites with an overwhelming amount of pop-up ads.

Embedding is like linking in that no copy is made, but users do not need to separately visit the site where the material is hosted. This is done by copying the embed code, usually symbolised as `< >`, and pasting it into the html of a page (see **Figure 5.1**). The code does not create a copy, but allows the material to be viewed within the resource. You need to be careful when embedding. The material needs to be legitimate and you should only embed material when the hosting site enables it to be embedded. For example, YouTube allows videos on their platform to be embedded on other sites by providing the code for this under the “share” options.



Figure: 5.1: Code from YouTube which was copied to embed the [Creative Commons licences explained](#) video by [Process Arts](#), licensed under a [CC BY 3.0 NZ licence](#), which was used in the previous chapter.

Permissions

You will need to seek permission from the copyright holder if you want to use copyright material in an OER and can't rely on an exception and are unable to link to it. You'll also need permission to use openly licensed materials if they have incompatible licences, e.g. combining CC BY-SA and CC BY-NC materials, or if your use falls outside the licence scope, e.g. adapting CC BY-ND material.

Firstly, check the copyright status and terms and conditions of the material. Many people and companies set out the terms relating to permission to use their copyright material on the site itself. This usually happens in one of three ways:

- 1. The material itself may contain information on its permitted uses (there may be an indication near where the content is posted).**



Shoes

1954

H & M RAYNE, London (shoemaker)

Edward RAYNE (designer)



This image is available to download for publications and non-commercial use.
For commercial uses, please complete an online
Reproduction Request Form

Figure 5.2: Screenshot of [NGV website](#) showing collection image and text which appears when the “Download” link is clicked, used under the terms as indicated.

2. A section of the website entitled ‘Copyright’, ‘permissions’ or similar will contain copyright and permissions information for material on the site.

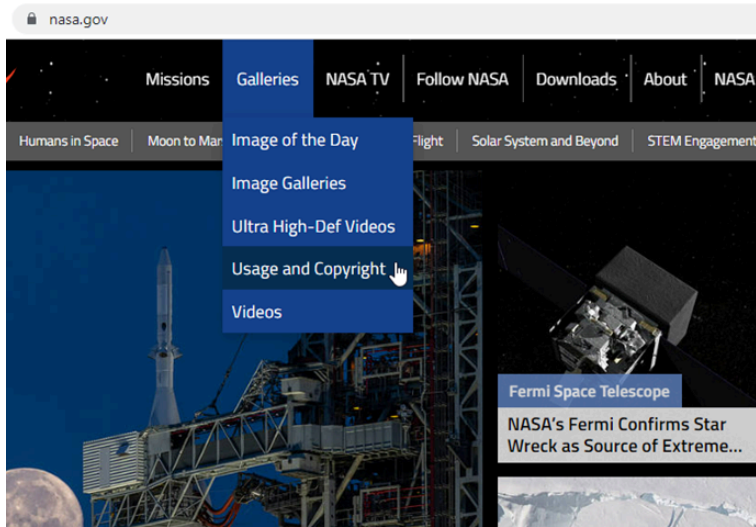


Figure 5.3: Screenshot of [NASA website](https://www.nasa.gov) showing link to [Usage and Copyright](#) page, used under permission as outlined on the page.

3. The site’s terms and conditions of use will specify how material can be used

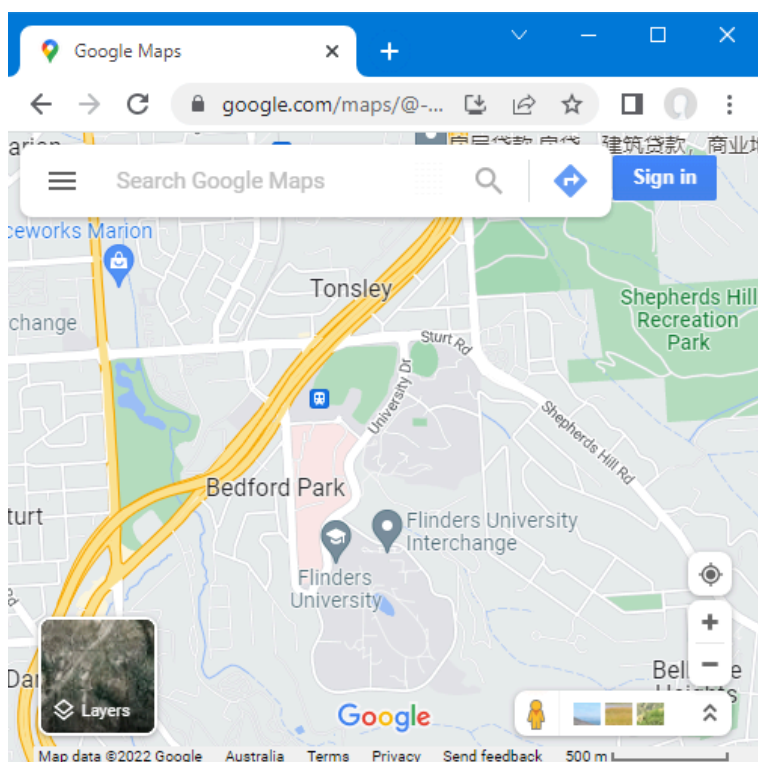


Figure 5.4: Screenshot of [Google Maps](#) showing link to [Terms](#) at bottom of the page, used under terms outlined on the page and the additional [Using Google Maps, Google Earth, and Street View](#) permissions page.

If you want to use copyright material in your OER, in a way that is beyond the conditions of the express licence, then you will need to contact the copyright owner for further permission. You'll need to seek permission in writing and outline how you plan to use the material, where your OER will

be hosted, and the type of Creative Commons licence it will have.

Attribution

Even when you can legally use a resource, it is important that you acknowledge the work of others. This is a legal moral right and an important academic integrity principle. It is also a cornerstone condition of open licenses. An attribution statement provides credit to the original creator and is a legal requirement of an open licence.

Attribution vs. citation

You are probably already familiar with the concept of citation. A citation allows authors to provide the source of any quotations, ideas, and information that they include in their own work based on the copyrighted work of other authors. An attribution is similar to a citation, but there are also differences. These are summarised in **Table 5.1** below:

Citation	Attribution
Purpose is academic (e.g., avoiding plagiarism)	Purpose is legal (e.g., following licensing conditions)
Does NOT typically include licensing information for the work	Includes licensing information for the work
Can paraphrase, but cannot typically change the work’s meaning	Can typically change the work (e.g., advanced permission granted with licence)
Many citation styles are available (e.g., APA, Chicago, and MLA)	Attribution statement styles are still emerging, but there are some defined best practices
Cited resources are typically placed in a reference list	Attribution statements are typically found near the work used (e.g., below an image)

Table 5.1: *Attribution vs Citation* adapted from [Abbey Elder](#) (adapted from [Citation vs. Attribution](#) by Laura Aesoph). All tables licensed [CC BY 4.0](#)

Attribution statements

There is no one correct way to provide an attribution statement, but the best practice is to include the full TASL information for the resource. TASL is:

- **T** = Title

- **A** = Author (creator)
- **S** = Source (link to the resource)
- **L** = Licence (link to licence deed)

If you don't have all of the TASL information about the resource, do the best you can and include as much detail as possible in the attribution statement.

The attribution statement under **Figure 5.5** is a good example of a statement as it includes all of the TASL information with appropriate links provided, where:

- Title is "Creative Commons 10th Birthday Celebration San Francisco"
- Author (creator) is "tvol" hyperlinked to his profile page
- Source is "[Creative Commons 10th Birthday Celebration San Francisco](#)" hyperlinked to original Flickr page
- Licence is [CC BY 2.0](#) hyperlinked to licence deed



Figure 5.5: [Creative Commons 10th Birthday Celebration San Francisco](#) by [tvol](#), licensed under [CC BY 2.0](#).

When a work is adapted, changes need to be indicated in the attribution statement along with the creator of the original work. An example is demonstrated in the statement for **Figure 5.6** below:



Figure 5.6: This work, “90fied”, is a derivative of “[Creative Commons 10th Birthday Celebration San Francisco](#)” by [tvotl](#), used under [CC BY](#) “90fied” is licensed under [CC BY](#) by [Your name here].

Using Indigenous Cultural and Intellectual Property

Indigenous Cultural and Intellectual Property (ICIP) refers to the right of Indigenous Australians to protect their cultural heritage, including all aspects of art, knowledge systems, and culture (Janke, 2022). When planning to include Indigenous content in OER, it is important to be cognisant of ICIP and to respect the rights of Indigenous individuals and communities to be consulted and provide consent.

It is crucial to seek appropriate Indigenous permissions to use or disseminate Indigenous knowledge. The following sources provide guidance and information about Indigenous Protocols:

- The Australia Council for the Arts’ [Protocols For Using First Nations Cultural And Intellectual Property In The Arts](#)
- Oxfam Australia’s [Aboriginal and Torres Strait Islander Cultural Protocols](#)

- [True Tracks](#), by Indigenous lawyer Terri Janke, provides information about the legal protection of Indigenous art, cultures and knowledge.

Be aware that Indigenous cultural IP may not fit into traditional areas of copyright and reuse. It's best to seek out help from those who have expertise in this area. Contact your University's Indigenous unit for more information.

Although there is a huge amount of openly licensed material available it's likely that there'll be times when you want to use copyright material. This means you need to know if and how this is legally possible. It's also important that you can explain this to others. For example, academic staff may identify copyright material they want to use and are already familiar with the rules that allow them to do this in courses they typically teach. You'll need to explain the reasons why these rules don't apply to OER and to provide them with a solution.



Reflect: Misconceptions and differences

There are many misconceptions about copyright and openly licensed material. For example, one misconception is that it's legal to use 10% of copyright material for any purposes, as long as you credit the creator. Whereas the truth is that even using a small portion of copyright material may be an infringement depending on the circumstances.

- Identify one common misconception about copyright and/or openly licensing that you have encountered, and think about how you would address it.
- What do you see as the greatest difference between using openly licensed and copyright material?

Case study: Combining copyright and openly licensed material

Nikki Andersen is the Open Education Content Librarian at the University of Southern Queensland. It is her role to design and ensure the copyright compliance of open textbooks. When producing open textbooks, Nikki uses a [copyright tracker](#) to keep track of the copyright statuses of content within the text. It is her job to check the third-party content, apply for permissions, suggest alternative replacements, ensure compatibility of licences, and ensure correct attributions.



Do: Analyse the copyright details

Read the licence and copyright metadata from the textbook [How To Do Science](#), published by the University of Southern Queensland. Scroll through the first chapter [Science and the Scientific Method](#),

paying attention to the figure attributions and copyright note.



Reflect: How to Do Science

- Is this [text](#) an adaptation or original work?
- The book is published under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 licence, which is one of the more restrictive CC licences. Why would the University of Southern Queensland select this licence? What would they have needed to consider when choosing the licence?
- Some of the figures used in the book have different CC licences. Do you see any

problems with this?

- Read the ‘copyright disclaimer’ at the bottom of the book’s landing page. It lists content in which permission was sought. What implication does this have for others wishing to adapt or reuse the text?

Case study: Attribution

The importance of attribution was demonstrated in the following two court cases.

Court case one: Drauglis v. Kappa Map Group, LCC

This case from the United States concerned the use of the “Swain’s Lock” photograph by Art Drauglis. The photograph was posted on Flickr under a CC BY-SA 2.0 licence and subsequently used on the cover of an atlas published by Kappa Map Group.



Figure 5.7: [Swain's Lock](#) by [Art Drauglis](#), licensed under a [CC BY-SA 2.0 licence](#)

Drauglis argued the CC licence was violated in several ways:

1. The use of his photograph as a cover of an atlas constituted a “derivative work” which therefore would have had to have been shared under a CC-BY-SA licence to be compliant.
2. There was inadequate information about the CC licence in the text of the atlas.
3. The attribution term was not met because attribution was not appropriate, as the credit for the photograph was on the back cover in small font while the image was on the front.

Drauglis was unsuccessful, with the court finding that:

- The use of the photograph on the cover did not constitute a “derivative work”. Because the atlas was published “in its entirety in unmodified form” it was a “collective work” rather than a “derivative work”, which is “a work based upon the Work”
 - The inclusion of “CC BY-SA 2.0” was adequate information about the CC licence and a link or the text of the licence was not required. This is because the CC licence refers to a URI (Uniform Resource Identifier) which can either be a Uniform Resource Link (URL) or the Uniform Resource Name (URN), which in this case was CC BY-SA 2.0.
 - Credit was appropriate when compared with the credits given to the maps included in the atlas.
-

Court case two: Gerlach vs. DVU

This case from Germany concerned the use of a photograph of politician Thilo Sarrazin by Nina Gerlach. The photograph was released under a CC BY-SA 3.0 licence and subsequently used on the website of the German political party, DVU, without any attribution statement.



Figure 5.8: [Thilo Sarrazin am 3. Juli 2009](#) by Nina Gerlach, licensed under a [CC BY-SA licence](#)

Gerlach first sent a notice and takedown letter which the party ignored so then sought a preliminary injunction against the unauthorised publication of the picture. This was granted as the court found that the licence terms were breached which meant the licence could not be relied on to use the work.



Do: Knowledge check



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=34#h5p-6>

Key takeaways

This week we learnt that.

- Relying on exceptions to use copyright material in OER

is complex and institutions take different approaches.

- Copyright material can sometimes be linked to or embedded in OER.
- In some cases you may need to seek permission from the copyright owner to use copyright material.
- Any copyright material that is used in OER needs to be clearly identified and it can affect how the OER is licensed.
- All material (openly licensed and copyright) needs to be properly attributed, this is both a legal requirement and an important academic integrity principle.

In the next chapter, we will start on Part 3 which is all about finding and evaluating OER.

References

Janke, T. (2022). *Indigenous cultural and intellectual property (ICIP)*. Terry Janke and Company. Retrieved August 24, 2022 from <https://www.terrijanke.com.au/icip>

Copyright

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- [Creative Commons Certificate for Educators, Academic Librarians and GLAM](#) by Creative Commons, licensed under a [CC BY 4.0 licence](#).
- [Drauglis v. Kappa Map Group, LLC](#) from the [CC Wiki Links to an external site.](#), licensed under a [CC BY 4.0 licence](#).
- [Gerlach vs. DVU](#) from the [CC Wiki](#), licensed under a [CC BY 4.0 licence](#).
- [The OER Starter Kit](#) by Abbey Elder, licensed under a [CC BY 4.0 licence](#).
- [Self-Publishing Guide: A reference for writing and self-publishing an open textbook](#) by Lauri M. Aesoph, licensed under a [CC BY 4.0 licence](#).

PART III

PART 3: FINDING OER

6.

PREPARING TO LOCATE OER

Learning outcomes

By the end of this chapter, you will be able to:

- Identify your OER need
 - Develop an OER search strategy
-

Preparing to search

Before we begin searching for OER, it's important to do the preparatory work to ensure you have a clear understanding of your OER need (i.e. what you're searching for and why) and have some search strategies at hand to ensure you can search effectively and comprehensively to find suitable OER.

For those who have worked in a research capacity, provided reference support or have general experience in this space, how

you identify your OER need is very much the same as how you might surface the information need of a reference query – you conduct a reference interview to establish the initial query and ask questions to clarify and surface the true information need of the patron’s request. This is an important step when triaging a reference query as a patron may not always have a clear understanding of what they’re looking for or be able to clearly articulate what they need support with. This is equally important when working out your or others’ OER need, as you will be more effective and efficient if you are clear from the outset.

In the following sections, we’ll be focusing on two steps you can take to prepare for searching OER:

1. Identifying your OER need using a reference interview approach
2. Developing search strategies and search terms to use once you start searching for OER.

How to identify your OER need

Applying the reference interview approach can be a helpful way to identify your OER need. What does this look like in practice? Let’s work through an example together, using the scenario below.

Imagine you have received a request from an academic who is new to OER and would like to include OER in their subject on “Indigenous curriculum in schools in Australia”.

Before we jump in and start searching for suitable OER, we’ll need to clarify our understanding of the request by asking some key questions:

- **What is the request or task at hand?**

What is the actual request? What does the academic want assistance with? Is it to provide OER suggestions for prescribed or recommended readings? Is it to find OER for a specific assignment or assessment? Who is the student cohort? Is it a capstone subject? What year of study are the students in?

- **What is the topic and subject area in question?**

What is the topic about? What is the subject or discipline? By “Indigenous curriculum in schools” is the academic referring to primary or secondary school curriculum or both? Is there a specific aspect they are interested in? What about the context of colonisation, how will this need to be considered? What is in and out of scope? What are the parameters of the subject?

Deepening our understanding of the topic and subject area will not only help us find suitable OER which will meet the needs of the request, but it will also help us decide which

discipline-specific OER databases to search once we begin searching.

- **What kind of OER will be suitable?**

OER can come in different forms, including textbooks, learning objects (quizzes, modules, games, etc.), images, videos, audio clips and courses. What is important as part of understanding the OER need is to identify what type of OER will be suitable to recommend.

For example, the academic may be interested in adding readings to their subject reading list which may mean textbooks and other learning resources are more suitable. Or the academic could be interested in adding content to their LMS, in which case learning objects such as quizzes, modules, games or other types of content such as images, videos, audio clips and links may be good suggestions.

Understanding what type of OER will be suitable will also help us decide, later down the line, whether it will be appropriate to suggest the adoption or adaption of existing OER, or creation of a new OER if existing OER do not meet the needs of the request.

Unfamiliar with or need a refresher on the reference interview?

Here's a [short module](#) from OHIO Library Council which focuses on the reference interview. Keep in mind that although the module refers to a specific reference scenario, the general principles of approaching a query with curiosity, and asking clarifying and open questions to surface the true information need is still applicable.

Developing a search strategy

After developing a deeper understanding of the query and surfacing the OER need, the next step is to develop effective search strategies and a bank of search terms to deploy once we start searching. Spending the time to do this will ensure we can search effectively and comprehensively to locate suitable OER. If we continue with the above scenario, below are some key questions we can ask ourselves:

- **What are some of the key terms or words you can use when searching for OER?**

What are the key terms or concepts? What alternative key words can you use to develop a good search strategy? It's a good idea to start broad and work towards narrowing your search. Your brainstorm concept table might look a little like this:

Concept 1	Concept 2	Concept 3
Indigenous curriculum	School	First Nations
Aboriginal curriculum	Education	Indigenous peoples
Culturally relevant education	Classroom	Aboriginal Australians
Culturally responsive pedagogy	High school	Indigenous Australians
	Secondary school	

- **Piece together a search statement**

Similarly, with general searching, you can develop a search statement by combining keywords and concepts together using Boolean logic, truncation, phrase searching and wildcards. If we look at our concept table of search terms, a simple search statement we could start off with could be:

(Indigenous curriculum OR Aboriginal curriculum) AND education AND “First Nations” AND Australia.

Note: Many OER collections and databases are not

compatible with search statements, you can draw upon the bank of search terms you've brainstormed in the concept table when searching within these.

Now we have completed the preparatory work to identify our OER need and develop some search strategies and search terms to use, we're ready to start searching for OER!

Unfamiliar with or need a refresher on developing search strategies?

We encourage you to work through the resources below.

- [Developing a search strategy](#) module by Monash University Library which takes you through analysing your research topic and identifying terms to use for searching, combining search terms to create a search statement and applying your search statement in databases
- [Module 4: Resource Strategies](#) is an online learning module by the Ohio Library

Council. It focuses on search strategies, including terms, indexing and web searching.

In summary, how you might prepare for searching OER is similar to how you might prepare to search for resources on any topic. Spending the time to carefully unpack and understand the information need will help you successfully meet the needs of the OER request. Developing some search strategies and key search terms will enable you to conduct effective and comprehensive searches for suitable OER (the latter will also save you time and prevent you from searching in circles!). Preparing for searching will also help guide your decisions on which OER collections or databases to search, and whether you choose to adopt or adapt existing OER, or create new OER if existing OER are not suitable.



Watch: Finding quality Open Educational Resources [1:52 mins]

You may remember this video from Week 1 in which an Australian academic shares her experience using OER.

Rewatch the video as a refresher, and then complete the reflection activity below.



One or more interactive elements has been excluded from this version of the text. You can view them online here:
<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=38#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.



Reflect: Supporting others to locate OER

Dr Deborah Apthorp states that librarians can assist academics to locate OER.

- What experience have you had, if any, in your role with supporting academics with OER? Have you helped an academic locate OER?
- Are there any other strategies (besides the reference interview) you would use to better understand your patron's OER need?

Key takeaways

This week we learned:

- Similarly to how we might triage a research query, preparation is key to identifying the OER need so you

can successfully meet the demands of the request/patron.

- The reference interview can be a beneficial tool in deepening your understanding of the OER request and asking key questions will help you determine a) which discipline-specific OER databases or collections to search in later down the line, and b) whether adopting, adapting or creating OER will be suitable to meet the needs of the OER request.
- Developing some search strategies and a bank of key terms will help you conduct effective and comprehensive searches once you begin searching.

In the next chapter we will look at how to locate OER using OER search tools. This is where you'll get to learn some of the common OER databases and collections and start searching for resources!

7.

OER SEARCH TOOLS

Learning outcomes

By the end of this chapter, you will be able to:

- Locate OER using OER search tools
-

Locating OER using OER search tools

Where to search for OER will depend on the type of material you are looking for. A broader range of OER, including videos, course materials, and simulations can be discovered through general and discipline-specific OER collections. Below are some examples of OER metafinders and OER collections for you to explore.

Note: Some repositories and collections contain items that range in user permissions from no copyright (e.g., in the public domain), to CC licences, to all rights reserved. Make it your

practice to check every resource's licence to ensure it is truly open.

OER Metafinders

There are numerous OER collections containing high quality, openly licenced educational materials that can be searched through specific tools: metafinders. These tools search across multiple repositories and aim to make the discovery of open content easier. Prominent OER metafinders include:

- [OASIS – SUNY's Openly Available Sources Integrated Search](#) searches a curated database drawn from 80 different sources.
- [The Mason OER Metafinder](#) performs a simultaneous search across 23 different sources of open educational materials.

OER collections

There are a range of general OER collections that cover a range of resource formats and media types. They are particularly useful for finding educational materials to adapt or remix as part of a course. Some examples of these collections are as follows:

- [OER Commons](#) is an open digital library of OER of

many different kinds.

- Did you know? The CAUL Digital Dexterity Champions have created a group within OER Commons to share resources? Explore the [CAUL Digital Dexterity](#) group resources.
- [MERLOT](#) is a curated collection of over 98,000 OER. The platform is maintained by California State University with partner institutions and societies around the world.
- [LibreTexts](#) is a collection of open textbooks, learning objects, and other OER. It covers a range of disciplines, including biology, business, chemistry, engineering, the humanities, mathematics, medicine, physics, and social sciences.
- [Khan Academy](#) is a collection of educational videos, mostly released under CC BY-NC-SA licences.

Discipline-specific OER collections

There are also a range of discipline-specific OER collections and repositories with particular subject strengths. Some examples include:

- [AMSER \(Applied Math & Science Educational Repository\)](#) is a portal of educational resources and services free for anyone to use, but not necessarily openly licenced – check the “Rights” field of licence terms.

- [COERLL \(Center for Open Educational Resources and Language Learning, University of Texas at Austin\)](#) produces and disseminates OER such as online language courses, reference grammars, assessment tools, corpora, and more.
- [CORA \(Community of Online Research Assignments\)](#) is an open and collaborative space for faculty and librarians, focused on adapting and experimenting with research assignments to get students to engage with information resources in new ways.
- [Virtual Labs](#), an initiative of MERLOT and SkillsCommons, is a collection of free virtual labs, experiments, and simulations, for STEMM disciplines. Many of the resources are open source but check licence terms before adapting or downloading.
- [Noba Project](#) is an open psychology education initiative produced by the Diener Education Fund. Noba enables free access to open psychology textbooks and materials.

Open textbook collections

In post-secondary environments, open textbooks are one of the most common types of OER used to support learning. However, a significant barrier to open textbook use is a common perception among educators that finding traditional textbooks is easier than finding open content. However, studies suggest that increased faculty awareness of the benefits

of open textbooks – such as accessibility features and the potential to use innovative pedagogical approaches – support their adoption (Jung, Bauer & Heaps, 2017). The following are some examples of open textbook collections:

- [Pressbooks Directory](#)

Pressbooks is an open publishing platform based on WordPress. The Pressbooks Directory shares open textbooks and resources. Several Australian universities publish using Pressbooks, so it can be a good source of local content.

- [Milne Open Textbooks](#)

Milne Open Textbooks is managed and maintained by Milne Library Publishing at the State University of New York (SUNY Geneseo). It is a catalogue of open textbooks authored and peer-reviewed by SUNY faculty and staff. These OER works have a variety of publishers, but all are:

- authored by a SUNY faculty member
- full courses or texts to be used in a college-level course
- original works, or a significant remix or adaptation of another open work.

- licenced with a Creative Commons licence, with permission to create derivatives (no ND designation)
- [BC Open Textbooks](#)

The British Columbia Campus Consortium's OER repository, the BC Open Textbook Collection is Canada's first major repository of OER textbooks and is available to be freely used by students, instructors, librarians, and members of the public. It contains textbooks from a variety of resources that can be freely assigned (or revised) for courses.

- [OAPEN Library](#)

OAPEN Library is a central repository for hosting and disseminating OA books. The platform is run by the OAPEN Foundation, a not-for-profit organisation based in the Netherlands, dedicated to open access, peer-reviewed books.

- [Open Textbook Library](#)

The Open Textbook Library, supported by the [Open Education Network](#), is a repository of original open textbooks used in higher education institutions. Public

reviews by academics using these books are often available.

- [OpenStax](#)

High-quality, peer-reviewed collection of open textbooks. Features online highlighting, note-taking, and learning and teaching resources associated with each textbook.

Other collections

In addition to the various resources, databases and collections outlined in this module, other common tools, such as Google and YouTube, are available to locate OER. The two resources below show how YouTube and Google can be used to find open resources:

- [How to find Creative Commons materials using YouTube](#)
- [How to find Creative Commons materials using Google](#)

Universities throughout Australia and Aotearoa New Zealand also maintain OER collections. Examples include:

- Auckland University of Technology – [Tuwhera Open Access](#)

- La Trobe University – [La Trobe eBureau](#)
 - University of Southern Queensland – [Free and Open Textbooks](#)
 - University of Technology Sydney – [UTS ePress](#)
-

Searching OER collections

Searching OER collections is like searching any library database. Some tips for searching OER online collections effectively:

1. Use keywords related to your subject
2. Start broad and then narrow depending on the results to get an idea of the breadth of resources available in your area
3. Use the subject headings and filters in the repositories
4. Compile a list of relevant OER
5. Evaluate relevancy by searching tables of contents and descriptions

Broadly speaking, library professionals and academic libraries play an important role in promoting and supporting the adoption of OER. It is, therefore, important to understand what OER collections are available and what resources each collection provides.



Reflect: OER advocacy

How do you think your knowledge of available OER collections would help you advocate the OER movement?

Watch an example of how to search Khan Academy, Merlot and OER Commons, three OER collections.



Watch: Searching in OER Repositories – Use the tools! [4:27 mins.]



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=40#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.



Reflect: OER collections

Choose 2-3 OER databases or collections to explore.
What are some of the similarities or differences?
Was one easier to search over the other? Why?



Do: Search a collection

Complete a search in an OER collection of your choice and find OER relevant to the topic. Reflect on

this process and how it will inform your OER search practices going forward.



Reflect: OER collections that are useful for your role

What OER collections did you find interesting when exploring the OER collections? Which OER collections were most useful for your current role? Identify the OER collections you will use, why and how.

Key takeaways

This chapter we learnt:

- about a variety of OER collections.
- how searching for OER is like searching for information within databases – selecting the right collection and using filters.

Next chapter, we will look at how to evaluate the quality of OER. This is an important part of the process and there are many tools you can use to get started.

References

Jung, E., Bauer, C., & Heaps, A. (2017). Higher education faculty perceptions of open textbook adoption. *The International Review of Research in Open and Distributed Learning*, 18(4). <https://doi.org/10.19173/irrodl.v18i4.3120>

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8.

EVALUATING OER

Learning outcomes

By the end of this chapter, you will be able to:

- Evaluate the quality of OER using specific criteria
-

OER quality evaluation

Last chapter you explored a variety of OER Collections and how to search for OER. Watch the below video to revise this content and begin to understand the importance of quality and evaluation.



Watch: How to find and evaluate OER [6:04 mins]



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=42#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.

Similar to evaluating any type of retrieved information, It's important to ask some critical questions when selecting OER. This is to ensure retrieved OER match the need identified. Below are some key areas of evaluation:

Authority

- Who is the author?

Accuracy

- Is the information accurate? Are there major content errors or omissions?
- Are there spelling errors or typos?

Relevance

- Does the OER cover the topics you need covered?
- Is it relevant to the context being studied?
- Could it be adapted to be made relevant?

Audience

- Is the OER suitable for your cohort?
- Is it developed for a more advanced, or more general, level?

Quality of content

- Is the educational content accurate, current, and of a high academic standard?
- Was it developed by qualified experts at a reputable institution?

Production quality

- Is the information clear and understandable?
- Is text appropriately formatted, are images and videos in high resolution, and is audio clear?
 - If not, can you improve the quality of the material, or create a high-quality version?
- Do the design features enhance learning?

Accessibility

- Is the OER accessible and inclusive of students from diverse backgrounds, or with disabilities or learning difficulties? For example, do images have captions or alt text?
- Are colour-blind-friendly diagrams used?
- Is the language accessible?
- If the OER is not accessible, can you adapt it to make it so? If not, you will need to find an accessible alternative.

Interactivity

- Does the resource encourage active learning and class participation?
- Are there opportunities for students to test their understanding of the materials (e.g. a video with embedded questions?)

Licensing

- Is the OER licenced in such a way that you can do what you need with it?
- For example, if you plan to adapt the OER, you'll need to avoid Creative Commons licences with ND (No Derivatives) elements.

Checklists and rubrics

When evaluating OER, it can be helpful to use a checklist or rubric. Here are some examples:

- [Queen's University Library – OER Guide](#)
 - Queen's University Library offers an Open Educational Resource guide with checklist information.
- [iRubric: Evaluating OER rubric](#)
 - Rcampus (a commercial resource) provides an example of how to evaluate an OER using a rubric.
- [University of Queensland – Evaluate OER](#)
 - University of Queensland Library offers an Open Educational Resource guide with an OER evaluation checklist.
- [Federation University – Evaluating OER](#)
 - Federation University Library offers an Open Educational Resource guide with information on evaluating OER, including a checklist and tools for evaluating OER.

- [BCcampus – Guide for Evaluating Open Education Resources](#)
 - BCcampus supports post-secondary institutions within British Columbia. BCOER, a group of librarians within BCcampus, have provided a checklist guide for evaluating Open Education Resources.
-



Reflect: OER evaluation resources

Choose two of the OER evaluation resources introduced above. Compare them and note the differences and similarities between the two.

Watch the below video to learn some excellent guidance on how to evaluate OER.



Watch: OER Bootcamp: OER and how to evaluate them [5:16 mins.]



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<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=42#oembed-2>

Note: Closed captions are available by clicking on the CC button in the video.



Do: Record your strategies

Record your ideas and notes including the evaluation strategies you are using, or will use.

Assisting our university communities to identify and locate OER is important, and we should recommend evaluation strategies and tools, and participate in the evaluation practice ourselves when using and recommending OER.



Reflect: Evaluating OER

- What do you think the consequences of using low quality OER would be?
 - Why do you need to evaluate OER?
 - Why is evaluation important?
 - Is evaluating OER different to evaluating other educational resources?
-



Reflect: What would you do?

You've located an OER that meets your needs. However, based on the evaluation you've completed, the OER is not of good quality. There's also no other similar OER available. What would you do?

Key takeaways

This chapter we learnt:

- evaluation is an important part of the OER process. Asking critical questions and selecting a tool (such as a rubric or checklist) will assist you to use the quality OER needed.
- about some existing rubric or checklist that can be used for the purpose of evaluation.

Once you have completed the evaluation for any located OER and if it meets your identified OER need, you may decide to adopt or adapt the resource. Next chapter, you will explore how to adopt, or adapt and create OER.

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- [Open educational resources \(OER\)](#) by Federation University Library, licensed under a [CC BY-SA 4.0 licence](#).

PART IV

PART 4: ADAPTING AND CREATING OER

9.

ADOPT, ADAPT OR CREATE?

Learning outcomes

By the end of this chapter, you will be able to:

- Differentiate between adopting, adapting and creating OER
 - Explain the pros and cons of adoption vs adaption vs creation of OER, and identify when is each more appropriate
-

Adopting, adapting and creating: How are they different?

There are three main choices when it comes to using OER in educational settings (Elder, 2019):

- **adopt** an existing resource that suits the learning objectives of their course without making any changes to the content
- **adapt** a resource by customising some of the content, e.g., add local examples
- **create**
 - **remix** a variety of sources to create a new resource
 - **author and license** a new resource, created from scratch using their own materials

Each option has different considerations, including suitability of the OER content and format, accessibility features, and the preparation time required.

A study by Jung, Bauer & Heaps (2017) found that 82% of participants spent the same amount of time or less preparing to teach their course using an open textbook. This indicates that adopting an OER does not necessarily lead to increased workload and may even reduce preparation time.

However, using OER will often require some customisation of content to improve course alignment and ensure the material is tailored to support student learning. You may also wish to combine multiple OER and remix them, or you may decide to create their own OER from scratch. Each of these involve different time commitments, as illustrated below.

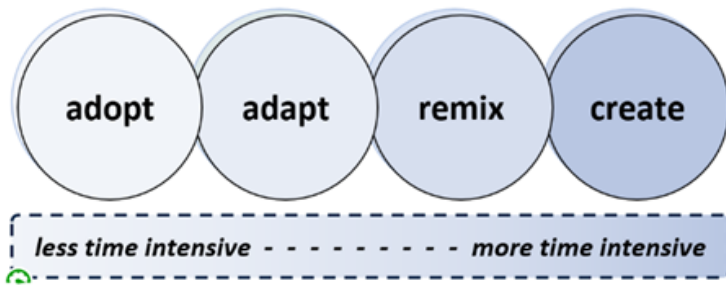


Figure 9.1: Spectrum of time intensiveness. Image by [University of Melbourne Library](#), licensed under a [CC BY-SA 4.0 licence](#).

Why adopt OER?

If you locate a suitable OER to adopt and do not need to make any changes to the content, you can simply share the resource. The majority of OER are online and can be shared via a hyperlink, embedded into a Learning Management System, LibGuide, website etc. according to the Creative Commons licence. Many OER have an option to download a file of the resource, and the file may be shared.

Considerations when adopting OER

Students will have different preferences for using online vs

print resources. So, if using an open textbook, keep in mind that OER that have a specific non-commercial clause (CC BY-NC) cannot be sold with a markup or at a profit. Therefore, making a print copy available for purchase may not be possible. Some open textbook publishers, however, provide print-on-demand availability, such as [OpenStax](#).

Be aware of any requirements of your institution, which may add tasks and/or complexity. For example, you may be required to record the use of an OER within a course, as BCcampus does, using an [online form](#).

Why adapt OER?

As you're already aware, one of the greatest benefits of OER is that you can modify and remix existing OER to meet your needs, a practice known as "adaption". In other words, you can adjust the educational resources to fit your course curriculum, not the other way around. I'd like to introduce the notion of "good enough" here too. Many educators feel driven to create the "perfect" resources for their classes and it can be difficult to put aside that preference and use other people's creations. However, the number, variety, and quality of OER available freely is such that any educator should be able to find resources they can readily (with or without adaptations) put to use within their classrooms. Many will be "good enough" for

the educational purpose, and adaptation or adoption of OER will almost always be more efficient than creating teaching materials from scratch.

In general, there are a number of reasons for which we may choose to revise an existing OER. These are as follows:

1. Address a particular teaching style or learning style
2. Adjust for a different course or program level
3. Adapt for a different discipline
4. Accommodate a different learning environment
5. Address diversity needs
6. Meet a cultural preference
7. Meet a regional or national preference
8. Make the material more accessible for people with disabilities
9. Add material contributed by students or material suggested by students
10. Translate the material into another language
11. Correct errors or inaccuracies
12. Update the book with current information
13. Add more media or links to other resources
14. Use only a portion of the book for a course

Considerations when adapting OER

Not all OER are as adaptable as others. So if you are looking to adapt an existing OER, there are four key considerations that

you should keep in mind when evaluating existing OER for adaption potential.

1. Creative Commons licensing type

It is important to consider the type of Creative Commons licensing that's been applied to the OER you would like to adapt. The licensing that has been applied must provide you with the permissions you need to adapt the work within the context of how you want to use it. Licensing has already been discussed in chapters 4 and 5 so if you need to, review this material to ensure you understand the CC licences and what you are permitted to do according to each of them.

Watch the video below to learn about adapting OER while maintaining compliance with CC licensing.



Watch: Adapting OER [4:21 mins].





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<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=46#oembed-3>

Note: Closed captions are available by clicking on the CC button in the video.

2. Resource or software file type

Although the licence applied to the OER may be sufficiently ‘open’ to permit you to adapt it, the file format and structure can create technical barriers to adaption. As David Wiley (n.d.) explains, CC licenses give us permissions to exercise the 5 R’s (reuse, revise, remix, redistribute, retain), but poor technical choices can make open content less open (and thus, harder to work with). As a result, your ability to work with OER and advise others in their work will depend on having basic knowledge of common technologies used in resource design and being able to work with digital media files.

3. Content structure

The structure and content size are important as it is much easier to adapt an OER that consists of modules, sections or chunks than it is to adapt one large OER. Generally, the more chunked the content already is, the easier it is to adapt.

4. DRM restrictions

Digital rights management (DRM) systems allow publishers and vendors to impose limitations on the sharing and use of digital material such as eBooks and videos. As well as restricting sharing, DRM makes it difficult to open protected material on different devices or in different apps. As you would expect, the DRM applied to the software makes it both difficult and probably illegal to edit the resource, even if the content has been CC licensed by the creator. In these instances, use should probably be restricted to adoption rather than adaption.

One tool to guide the workflow processes for developing OER is the ALMS Framework. The ALMS Framework provides a way of thinking about those technical choices and understanding the degree to which they enable or impede a user's ability to engage in the 5R activities permitted by open licenses.

The framework includes four areas that questions about the technical openness of an OER mostly fit into, under the letters

A, L, M and S; hence ALMS. Here are the descriptions of each area.

- Access to editing tools: Can you edit the OER without the need for specialised or expensive tools?
- Level of expertise required: Would most librarians or academics be able to edit the OER at their current skill level?
- Meaningfully editable: Can all parts of the OER be edited?
- Self-sourced: Can you edit the OER directly or is a separate editable file needed?

Watch the video below for more detailed understanding of the ALMS Framework. The video is from the Virtual Library of Virginia and explores how technical choices impact the ability to engage in the 5R activities associated with OER.



Watch: The ALMS Framework [4:45 mins]



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<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=46#oembed-4>

Note: Closed captions are available by clicking on the CC button in the video.



Do: Knowledge check activity

Complete the knowledge check activity below to check your understanding of the ALMS Framework. You can retry the question if you answer incorrectly, or check for the correct answer. Refer to the framework materials to refresh your knowledge if you need to.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

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<https://oercollective.caul.edu.au/caul-open->

[educational-resources-professional-development-program/?p=46#h5p-10](#)

Why create OER?

As mentioned earlier, creating an OER is generally less efficient than adapting an OER; however, there may be times when there simply isn't an existing resource that is suitable for you to adapt.

Considerations when creating OER

There are some key considerations when creating OER. These are as follows:

- why you might need to create an OER
- what resources you might already have that could be used as a starting point
- the authoring tools available to use and their potential

limitations

- what licensing you might want to apply to the resources
- where to publish the resource to make it openly available

Watch the video below for a brief introduction to these considerations.



Watch: Creating open educational resources: Tips for new creators [5:17 mins.] (Elder, 2017).



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open->

[educational-resources-professional-development-program/?p=46#oembed-1](https://www.youtube.com/watch?v=46#oembed-1)

Note: Closed captions are available by clicking on the CC button in the video.

The video ends with a recommendation to talk with a librarian about these considerations, which is a great reminder of why we are learning about them in more detail. These considerations will be explored in greater depth in Chapters 10-12 of this book.

Watch the next video for a brief overview of the role of adopting, adapting and creating in teaching.



Watch: Adopt, Adapt, Create [2:17 mins.]



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<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=46#oembed-2>

Note: Closed captions are available by clicking on the CC button in the video.

Now that you have watched the video above, think about the

challenges of OER adoption, adaption and creation in your own context and complete the activity below.



Do: Knowledge check activity

Complete the knowledge check activity below to check your understanding of adopting, adapting and creating. Review the content under ‘Adopting, adapting and creating: how are they different?’ if you need to.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=46#h5p-11>

Whether you adopt, adapt or create an OER, there are important aspects to consider, and it is important to understand the differences between them all. Take the time to explore each concept. It will assist you to include OER in your own practice, and provide the correct advice to your educators to assist them to use OER within their curriculum.

Whether you are adapting or creating OER, or working with others to do so, it is vital that you understand the pros and cons of each approach so that you and they are able to make an informed decision based on the considerations discussed above.

Consider your rationale for wanting to use OER and the goals you want to achieve. As discussed in chapter 2, there are many motives for wanting to use OER. For many disciplines, it is important to have open content that is suited to the Australian or Aotearoa New Zealand context, whether that be case studies, for compliance with legislation, or accreditation requirements, or to achieve equity outcomes. Your end goal may ultimately be the deciding factor in whether you and/or those you work with choose to adapt an existing OER or create your own, and that decision will likely vary depending on the need.



Reflect: Reasons for not adopting

Now that you have an understanding of adoption, adaption and creation of OER, identify an example of a case in which you wouldn't adopt an OER. Reflect on why adaption or creation would be a better choice in this instance.



Read: OER Commons: a game of snakes and ladders for the Library profession

Explore this [article](#) written by CAUL Digital Dexterity Champions (Goodwin *et al.*, 2022). They outline the importance of sharing open educational resources in and outside the CAUL network, and the creation of a space for adopting and adapting resources.



Reflect: Your experiences adopting, adapting or creating OER

If you have experience adapting and creating OER, reflect on:

- Your experiences and learnings with the cohort. What were the challenges?
- The pros and cons of adaptation vs creation of OER

If you are new to OER:

- What do you think your primary adaptation and/or creation challenges will be?
 - Based on what you have learnt, would you prefer to adapt or create an OER? Why? How do you think your preference influence your practice?
-

Key takeaways

- OER can be adopted, which is about using the resource as is, without changes and within the licensing provisions.
- OER can be adapted, which is about using the resource with some modifications made to suit the context, within the licensing provisions.
- OER can be created, which is about making your own resource from scratch and applying your own licensing.
- It is important to evaluate and review OER to consider if they will meet the learning context. Are there already any that are suitable, or will you need to make changes or create your own?

In the next chapter we'll look at tools and techniques for creating OER.

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10.

TOOLS AND TECHNIQUES FOR WORKING WITH OER

Learning outcomes

By the end of this chapter, you will be able to:

- Provide examples of tools and techniques for guiding you through the process of adopting, adapting and creating OER
 - Identify OER adaptation and creation tools and sources of OER-enriching content
-

OER production workflow phases

A production workflow can be used when undertaking an

OER adoption, adaption or creation project, as the workflow will outline all the important steps you need to be aware of throughout the process. There are a number of workflows and frameworks you can choose from, and we will introduce some examples shortly. However, they all tend to cover the five following phases:

1. Research phase

At this step, you should ask yourself a few key questions to gauge your OER knowledge and skills before taking on a project. Have you explored OER content in your subject area before? Have you had any training to work with OER in the past? If you think you might need some training or advice, contact relevant colleagues to receive any assistance you might need before you start your OER work.

2. Pre-production phase

This phase involves the curation of existing OER resources that may be suitable for adoption, as well as planning the general design of the project. No new content should be adapted in this step, but a skeleton outline and other time- and task-based project management documents should be prepared. Having an OER consultation with an expert at this time is encouraged.

3. Design phase

This step is the last planning phase before work on the actual OER content begins. For projects adopting OER as-is, this may be the final step apart from preparing instructional documents. During this phase, project outlines and skeleton documents are fleshed out, and existing OER are fit into places where they are believed to be applicable. Any visual/graphic design work or curriculum development activities that require assistance from an instructional designer should be included here.

4. Development phase

This phase is where the most time is spent on OER projects that require building new materials. Existing OER that are being adapted or modified go through revision and review until they are in a place where they require only minor changes or copyedits. Checks for intellectual property (which CC license is on the content, and have we appropriately attributed everything?) are done, as well as checks for accessibility (is content formatted semantically, do images include alt-text, etc)? At this stage, content is typically drafted in Google Docs or another rich content editor (Word, OpenOffice) and is then ported into the publishing platform (e.g. Canvas, Pressbooks).

5. Publication phase

The final phase involves publishing and sharing the content that has been created. This includes creating export versions, archiving editable files for instructors who might wish to edit your work (.doc, .xml, etc), and considering where to publish any ancillary materials such as syllabi or lesson plans. The new adapted or original OER content is then disseminated to learners and shared with the open community.

Many aspects of Phases 1-3 have been covered in previous chapters, such as identifying OER, choosing between adopting/adapting/creating, understanding licensing and use options. Several aspects of Phases 4 and 5, such as accessibility and publishing, will be explored in greater detail in subsequent chapters.

The next section introduces you to two of the most useful production tools currently in use by the OER community.

OER production workflows

OER Production Framework

Developed by Abbey Elder (2019a), based on a version created by Meinke and University of Hawai'i at Mānoa Outreach College (2017), this general framework is ideal for use by

academics, learning designers or non-specialist librarians, including in collaborations with specialist library staff. Part of the OER Starter Kit (Elder, 2019b), it is applicable to a broad range of OER use scenarios (adopt/adapt/create), OER formats and OER project goals. It also refers the user to librarians and OER specialists for guidance/training as needed, making it an attractive choice for those wishing to highlight the role of their Library in OER projects.

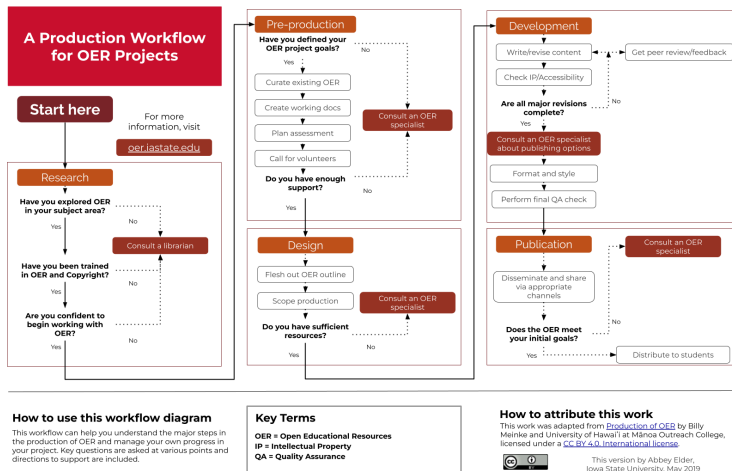


Figure 10.1: [A Production Workflow for OER Projects](#) by Abbey Elder, licensed under a [CC BY 4.0 licence](#)

CAUL OER Collective Publishing Workflow

The Council of Australian University Librarians (CAUL)

workflow is designed to guide authors and library staff through the basics of open textbook publishing in Australia (CAUL, 2022). Unlike the Production Workflow created by Elder (2019a), which covers a broad range of OER use scenarios (adopt/ adapt/create) and can apply to OER in any format and across a range of projects, the CAUL workflow has been developed specifically for the adaptation and creation of open textbooks in Australia. It is ideal for collaborative projects that involve Library staff working with learning designers and academics to publish open textbooks.



Figure 10.2: [Open Educational Resources Collective Workflow](#) by [Council of Australian University Librarians](#) is licensed under a [CC BY 4.0 licence](#).

Some of you may be involved in, or have colleagues involved in, the CAUL OER Collective, the project for which this

framework was developed. Each of the seven stages shown in the workflow diagram is explored in detail through a [step-by-step online guide](#).

Note that the development of an open textbook may incorporate a broad range of OER use scenarios (adopt/adapt/create) and the use of OER in a range of formats. As such, the key distinction between the CAUL OER Collective Publishing Workflow and the OER Production Framework is the specificity of the CAUL workflow project goal, which is to publish open textbooks.



Reflect: Project workflows

What would you primarily consider when choosing a project workflow to use? Why are those considerations important?

OER adaptation and creation tools

While the above resources are very useful for planning, especially for larger OER projects, they don't cover all the possible tools and platforms that are useful for adapting and creating OER. The [Open Education Database](https://oedb.org/) (OEDb.org, 2006-2022) curates an extensive list of useful OER tools, many of which are suited to small-scale projects, for example, Canvas. The full list can be a little overwhelming though, so some of the most useful free tools that enable educators to build, modify, or share OER are listed below:

- [MERLOT \(Create materials with Content Builder\)](#): The MERLOT Content Builder is a free website development tool. It is accessible from the MERLOT home page by clicking the Add menu at the top of the page and selecting Create Material with Content Builder (log-in required).
- [OpenAuthor \(OER Commons\)](#): OpenAuthor enables educators to build and share OER such as courses, units, lessons, activities and presentations on their own.
- [OpenStax Hub](#): The OpenStax Community Hub on OER Commons collects community generated resources related to OpenStax textbooks.
- [GitBook](#): This open-source tool allows you to create a textbook in Markdown (simple markup language) and is

hosted in the GitHub repository.

- [Ink Scape](#): This vector graphic editor application is an open-source tool used for editing PDFs and creating artistic and technical drawings.
 - [TED ED Content builder tool](#): TED-Ed is a “lesson creator” platform that enables instructors to create flipped classroom style activities.
 - [WP OER Plugin](#): WP OER is a free plugin which allows you to create your own open educational resource repository on any WordPress website
-

Sources of OER-enriching content for your project

We have previously focused, in Weeks 6-8, on how to find open educational content like textbooks and course materials that is ready to use and openly licensed for adoption. However, when creating or adapting OER, you might also like to include other media, such as images, music and videos, that might not have been created specifically for educational purposes. These media can be used to improve your OER project by either increasing engagement with the learning material or enhancing the communication of ideas.

There is a range of repositories that enable you to find open OER-enriching content that is either in the public domain or

that has a Creative Commons licence, and as such can be used in OER. The following repositories and search engines may help you source open materials to use in OER adaption or creation.

Note: Some repositories and collections contain items that range in user permissions from no copyright (for example, in the public domain), to CC licences, to all rights reserved. Make it your practice to check every resource's licence to ensure it is truly open.

Images:

- [Pexels](#): Images that are “Pexels”-licensed, which means they can be used for personal and commercial purposes without attribution.
- [Flickr: Creative Commons](#): Public domain and Creative Commons licensed images, searchable by licence type
- [Wikimedia commons images](#): Public domain and Creative Commons licensed images, searchable by licence type, file format, medium, source, amongst other features
- [Google Images Advanced Search](#): Scroll to the “usage rights” menu and select “Creative Commons licences” to retrieve openly licensed images.

Videos:

- [Pexels videos](#): Videos that are “Pexels”-licensed, which

means they can be used for personal and commercial purposes without attribution.

- [Wikimedia Commons Videos](#): Public domain and Creative Commons licensed videos, searchable by function, subject, source, amongst other features
- Platforms like YouTube and Vimeo contain many openly licensed videos, although most are all rights reserved. Check the licence terms of videos before using them as OER, as the software licence may prohibit adaption.

Music:

- [dig.ccMixer](#): Creative Commons licensed samples and remixes for music remixing.
- [Free Music Archive](#): Creative Commons licensed original music by independent artists in a range of genres.
- [Wikimedia Commons Audio files](#): Free audio repository, searchable by licence type, file format, language, subject, source, amongst other features

Other general resources:

- [Internet Archive](#): Digital library of free and borrowable books, movies and music, and home of the Wayback Machine

- [Openverse](#): For various media, all under Creative Commons licences or in the public domain.
- [Wikimedia Commons Animations](#): Public domain and Creative Commons licensed animations, searchable by format, subject, source, amongst other features

No matter how big or small your OER project or goal is, planning is a key part of ensuring success. We are fortunate that the OER community has operated internationally for long enough now for us to benefit from what can be learnt from their attempts, learning and achievements.

The frameworks, templates and lists of useful tools that have been developed by these OER pioneers will save new practitioners time, both in preparation and from avoidance of some common pitfalls. These tools and techniques should also enhance your confidence as you tread a path that has been created, tested and adapted over time and shared with the OER community to optimise the success of future OER activity.



Reflection: Adaptation and

creation tools

Choose two of the OER adaptation and creation tools introduced above, explore them, and reflect on the pros and cons of your chosen tools.

Key takeaways

In this chapter we explored some tools and techniques for working with OER, including workflows that cover the process from conception through to publication, tools for OER adaptation and creation, and the potential to use OER-enriching content in your OER project. In the next chapter we look at ways to centre equity, diversity, and inclusion in OER creation, how to make OER accessible and how to apply Universal Design for Learning principles to OER creation.

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- [Introduction to Open Educational Resources \(OERs\)](#)

by University of Melbourne, licensed under a [CC BY-SA 4.0 licence](#)

- [The OER Starter Kit](#) by Abbey K. Elder, licensed under a [CC BY 4.0 licence](#).
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11.

EQUITY, DIVERSITY, INCLUSION AND ACCESSIBILITY

Learning outcomes

By the end of this chapter, you will be able to:

- Understand the relationship between equity and open education
 - Identify ways of centering diversity, inclusion and accessibility in OER creation
 - Learn how to make your OER accessible
 - Learn how to apply Universal Design for Learning principles to OER creation
-

Equity, diversity and inclusion

Equity, diversity, and inclusion are three interrelated concepts.

Thinking of these three words, you may notice differences, similarities, or relationships between them. So, let's first look at some formal definitions with examples and guiding questions for each of these terms.

Equity

Equity is about treating some people differently, and to take into consideration their particular needs and situations. It's important to note that 'equity' is often confused with the word 'equality', which is about treating people the same way, and to give everyone equal access to opportunities and benefits in society.

For example, in the picture below, three people of different heights are trying to reach an apple on a tree. On the left, 'equality' shows everyone is given the same height box to stand on to reach the apple on the tree, however, only the tallest person could get the apple. On the right, 'equity' shows each person is provided with different boxes that each help all of them get the apple.

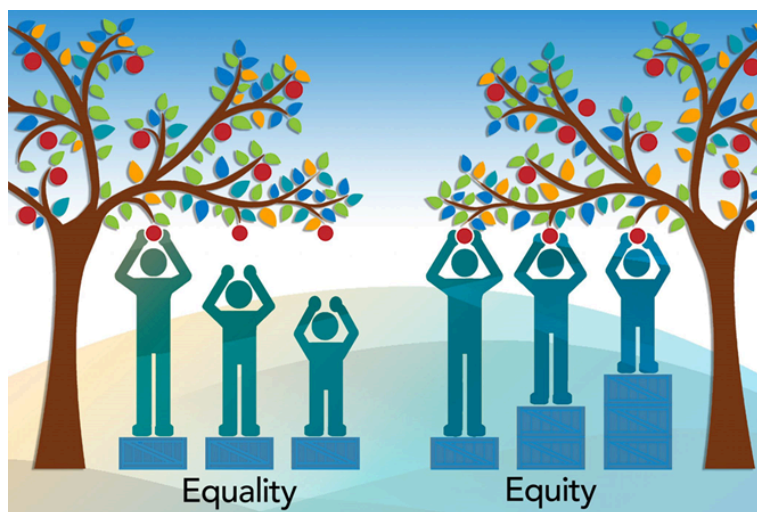


Figure 11.1: Equality vs equity. **Source:** ‘What is EDI?’ by Darla Benton Kearney, licensed under a [CC BY 4.0 licence](#).

Equity is a process that ensures everyone has access to the same opportunities. Equity appreciates that privileges and barriers exist and that, as a result, we all don’t start from the same place. Rather, each of us comes from a different background. Equity is an approach that starts with acknowledging this unequal starting place and makes efforts to address and change this imbalance (Bolger, 2020).

Diversity

Diversity is the presence, in an organisation or a community,

of a wide range of people with different backgrounds, abilities and attributes including ethnicity, race, colour, religion, age, gender and sexual orientation.

OER creators or publishers may ask the following questions if they are interested in promoting diversity:

- How can we ensure our open textbooks reflect the diversity of society?
 - How can we include diverse contributors in OER creation?
-

Inclusion

Inclusion refers to considering differences among individuals and groups when designing something (e.g., policy, program, curriculum, building, shared space) to avoid creating barriers. Inclusion is about people with different identities feeling or being valued and welcomed within a given setting.

If one is focused on inclusivity, one may ask:

- What is the lived experience for those who are marginalised?
 - Are there barriers in the way of marginalised individuals feeling a sense of acceptance and belonging?
-

Accessibility and Universal Design for Learning

Since OER are “freely accessible,” it may give the impression that OER are universally accessible, but many users still face inequitable barriers to access. Therefore, accessibility, and Universal Design for Learning (UDL) are key considerations to ensuring truly inclusive access to OER.

Universal Design for Learning

Universal design is the process of creating products (devices, environments, systems and processes) that are usable by people with the widest possible range of abilities, operating within the widest possible range of situations (environments, conditions and circumstances). UDL arose out of the broader [accessibility movement](#), as well as the advent of [adaptive and assistive technology](#).

UDL guidelines are based on the three primary brain networks shown in the slides below:

- Affective networks: The “why” of learning
- Recognition networks: The “what” of learning
- Strategic networks: The “how” of learning



Do: Click through the slides to view the different brain networks that are activated by the why, what and how of learning



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=50#h5p-4>

Watch this short video to learn about the benefits and principles of UDL.



Watch: Universal Design for Learning [5: 52 mins]



One or more interactive elements has been excluded from this version of the text. You can view them online here:

<https://oercollective.caul.edu.au/caul-open-educational-resources-professional-development-program/?p=50#oembed-1>

Note: Closed captions are available by clicking on the CC button in the video.

In the context of OER, [UDL](#) means removing potential barriers to access for students by designing content for all learning styles.

If you're not sure how well your OER utilises the principles of UDL, ask yourself:

- Do I have visual materials that present key concepts that not all students may be able to see or understand?
- Do I have multimedia materials (e.g. audio, video) that present key concepts that not all students may be able to be hear, see or otherwise access?
- Do I have documents that present key concepts in a format that not all students may be able to access?

To see what UDL looks like in practice check out [CAST's UDL Guidelines](#) and [UDL Tools for all Grades and Subject Areas](#).

Accessibility

Accessibility is one of the primary, but not the only, benefits of using UDL principles from the beginning. An OER that is created correctly from the beginning will significantly reduce the barriers to anyone using the OER. There is, moreover, also both a legal and moral impetus for creating accessible resources. Both accessibility and usability need to be built into your development process and should not be an afterthought.



Read: Accessibility standards

Read the [Accessibility Standards](#) in [CAUL's OER Collective Publishing Workflow](#) (introduced in Chapter 10). This guide outlines the accessibility standards that should be applied to OER creation.



Do: Accessibility check

Review a section in one of your institution's OER or find one, and use this [accessibility checklist](#) to see if it is compliant. How does the resource measure up

to the accessibility standards? What improvements need to be made?

It's important to note that OER can enable diversity and inclusion by ensuring users of OER can see themselves reflected in the content. In fact, you should ask yourself how the perspectives being represented in your OER might affect the inclusivity of your course environment.

Access doesn't equal inclusion. In fact textbooks are often sexist and racist, and exclude marginalised voices. We need to consider how to contribute to a transformation and expand open access to resources to truly address diversity, equity, and inclusion.



Optional read: Open textbooks and social justice: A national scoping study

This [study](#) investigated the potential for open textbooks to assist with improving the experience and outcomes of under-represented higher education students in the Australian context.

Diversity and inclusion in open education

Diversity in open education can be achieved by including a variety of sociological perspectives in your open content. Doing this ensures that your students can identify with and relate to your course material. It is critical to ensure that other cultures are presented accurately in your materials, and not

according to stereotypes or perceptions based on the standards of your own culture.

Whether intentional or not, ethnocentrism, “a tendency to view alien groups or cultures from the perspective of one’s own”, can creep into the content and presentation of course materials, and it is something all educators should be aware of. This doesn’t mean you must create course content that accurately portrays and includes all cultures and perspectives; however, you should be respectful toward other people and be aware of your biases as they arise.

One way you can accomplish this is by explicitly acknowledging the perspectives that are included in your content and those which are not. How has your social and cultural background reflected on the work you’ve created or curated? What authors are being cited and acknowledged in your content, and why? Acknowledging that your perspective is limited while including other perspectives in your work can be an incredibly rewarding experience. Some benefits of including diverse perspectives in course content include:

- Engaging more students because they recognise themselves or their life experiences in course content
- Sharing content that appeals to instructors in a variety of educational settings
- Creating a more interesting reading and learning experience for students and learners around the world

If you aren't certain about how or where to add examples relevant to other cultures, that doesn't mean a resource you adapt or create will never include these perspectives. Thanks to open licensing of OER, once a resource has been published, educators from other countries, cultures, and socioeconomic backgrounds can choose to remix your work for their course's needs. The changes they make might include:

- Translating an OER into a different language
- Adjusting the content to meet the local cultural, regional, and geographical interests
- Revising the material for a different learning environment

Another option for making your work more inclusive from the beginning is to consider inviting instructors and professionals in your field to contribute to your OER; however, you should be aware of the ways in which your project's design may deter or welcome people of other ethnicities, races, and cultural backgrounds. You can also leverage OER-enabled pedagogy to solicit students in creating diversity for class materials. The goal being to ensure their voices and perspectives are authentic and accurately represented.

Some strategies for making your textbook more diverse and inclusive:

- Acknowledge that your perspective is limited.

- Consider how your social and cultural background is reflected in your content.
 - Identify which perspectives are and aren't included in your content.
 - Consider which authors you're citing and why – could you be more inclusive?
 - Think about how your textbook could be more diverse – for example, through pictures, names or examples.
 - Bridge the gap by inviting instructors or professionals in your field from different backgrounds to contribute to your open textbook.
-



Optional Read: Enhancing inclusion, diversity, equity and accessibility (IDEA) in OER

For more ideas on how to make OER more inclusive, browse through this [guide on enhancing inclusion, diversity, equity and accessibility in OER](#).



Reflect: Strategies to make OER accessible and inclusive

What strategies can you use or pitch to others to make OER accessible and inclusive?

Key takeaways

In this chapter, we learnt:

- ways to center equity, diversity, and inclusion in OER creation
- how to make OER accessible
- how to apply Universal Design for Learning principles to OER creation

Next week we'll be exploring ways to publish and share your OER, as well as how you can measure its impact.

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- ‘[Centering Diversity and Inclusion.](#)’ in [The OER Starter Kit](#) by Abbey Elder, licensed under a [CC BY 4.0](#).
- ‘[Apply Accessibility Standards](#)’ in the CAUL [Open Educational Resources Collective Publishing Workflow](#) licensed under a [CC BY 4.0 licence](#).

12.

PUBLISHING AND SHARING YOUR OER

Learning outcomes

By the end of this chapter, you will be able to:

- Discover where you can host and share your OER
 - Understand the importance of metadata in OER discoverability
 - Learn how to promote and measure the impact and reach of your OER
-

Hosting your OER

Your OER project will need a home or “host,” which is somewhere you can store your OER project files. Others can access, reuse, and remix your OER from this home. How and where OER projects reside and are delivered for use once they

are completed is a decision that needs to be considered sooner rather than later (Cuillier et al. 2016). It will impact what you are able/willing to host (and how).

OER hosting mechanisms can be divided into three categories:

1. Repository: a centralised site that stores the OER locally (e.g., an institutional repository)
2. Referatory: a portal or directory that links to the OER and provides the metadata to help locate these resources (e.g., Open Textbook Library)
3. A combination of a repository and referatory (Brahmin, Khribi, and Jemni 2018; McGreal 2017)

These are explained further below.

Repositories

Institutional repositories

Institutional repositories (IRs) are quite common at academic institutions and are used for hosting locally produced materials, usually research articles, theses, books etc. created by the academic and student authors at the institution. Often, these IRs are managed by the university library.

An IR can offer some advantages for OER hosting. One is that it's often possible to customise metadata (the information that describes your OER). Another advantage is more access points (e.g., your content is findable by title, author, content type, etc.). However, an IR also needs care and maintenance, although that will not necessarily fall on you. You should check with your institution's library to see if you can use the IR to host your content. This can get tricky if you have many different types of media in your OER, but most IRs can handle the better-known formats.

Hosted solutions

There are some institutions that use third-party shared storage services (e.g., Google Drive, Box, and GitHub) to host their content. For other media formats, such as videos and slides, Kaltura, YouTube, Slideshare, or similar platforms can be used.

These hosting solutions have the advantage of being open, and many universities have a shared storage solution already in place. However, these solutions may not allow for search engine optimisation (SEO), metadata, and search engine functionality, such as being able to search by author or title, unless specifically created.

Referatories (portals and directories)

If you do not have the technical support to host the content in-house, there are other ways to host the content elsewhere. There are a few repositories that will host your content and/or act as your content creation system. These platforms and repository combinations include:

- [LibreTexts](#) – an online OER platform
- [OER Commons](#) – a public digital library of OER
- [Open Humanities Press](#) – an international open access publishing initiative in the humanities, specializing in critical and cultural theory.
- [MERLOT](#) – a collection that consists of tens of thousands of discipline-specific learning materials
- [Pressbooks](#) – an open-source authoring and publishing platform

Outsourcing your content also has some potential drawbacks. One thing to consider is what will happen to your content should the repository go away or no longer be maintained. If you are hosting locally, you should be okay as long as the server support is there. If you are hosting somewhere not under your control, it is something that you need to consider (and always have a local backup).

Technical considerations

- The hosting platform, whether it is local or external, can inadvertently create a barrier to access. For example, the platform may need too much bandwidth, so the material is hard to download or discover. As a result, you might consider offering a low-bandwidth version of your OER if you find it necessary.
- In order for your OER to be remixable and revisable, they need to be in an editable format and the user needs to be able to download editable source material. Without this ability, a “license offers only theoretical rights” (Ovadia 2019).
- In order to determine where and how to store your OER, you will also need to consider what technical formats you will offer the OER in, or what formats you can accept from your faculty authors.



Do: Join CAUL's Digital Dexterity Champions OER Commons group

Explore the CAUL Digital Dexterity Champions OER Commons [group](#) and join the group.

Reusability and revisability of content

Discoverability and reusability of your OER content are central to being open and can prove to be challenging for OER creators (Amiel 2013; Ovadia 2019). As an OER creator, you will want to take these into consideration. These considerations include:

- reusability of the content: can the content be downloaded as opposed to just viewed?
- revisability of the content: is the file format editable for the content to be remixable and revisable by anyone, rather than just individuals who have access to

proprietary software (Ovadia 2019).

Metadata

“Metadata are the key elements for repositories to represent and organise educational resources” (Mouriño-García et al. 2018). The term “metadata” refers to the descriptive data about your OER, such as the author, title, date created, format, length, license (e.g., Creative Commons), etc.

Currently, there are no agreed-upon metadata standards for OER repositories. Different repositories may have different metadata standards, although there are some better-known schemas, such as IEEE Learning Object Metadata (LOM), ISO/IEC MLR, or Dublin Core Metadata (Mouriño-García et al. 2018). Because each repository is unique, you will likely use the metadata standard of the hosting platform. No matter what hosting system you use, be sure to fill in as much of the metadata as you can. It will improve the discoverability of your resources, since most people use a basic search engine to find OER and few people use the advanced search functions to refine their searches (Dichev and Dicheva 2012).

While the content itself is the primary element to consider, the back matter and other metadata, such as an index, keywords, abstract or subject headings do signal priorities and importance; they can show how important a particular topic/

issue is. Keep in mind that you will need to generate some of the metadata for your resources, such as determining the appropriate subject headings. This can take some time and should be a part of your workflow (Mouriño-Garcia et al. 2018).



Read: OER metadata Rosetta Stone

To assist with establishing metadata considerations as part of your workflow read the [OER Metadata Rosetta Stone](#). This document is the technical specification of core and contextual elements for OER using existing schema to create a Metadata Application Profile. It provides a list of relevant classes and properties used in OER metadata records at the institutional and repository level.

Marketing

Once your project is complete, you will need some marketing tools to help share your work. For example, a one-page flyer announcing the publication of the work or a notice to a list such as LibOER or subject-specific lists can help spread the word about the new resource. If your library or institution has a social networking presence or even a marketing department, an announcement here will raise awareness of the resource as well as the work of your unit or department.

Measuring impact, value and reach

When you add your material to a repository or referatory, check to see what kind of usage statistics or metrics you can get. Downloads, shares and views are one good indicator of the impact the OER is having outside the institution. Academic staff will appreciate having this information available to them to improve their content and also demonstrate the impact of their work, especially as part of the promotion and funding application processes. Most repositories or referatories will provide the number of views and/or downloads, but some will also provide alt-metrics, such as the number of times a resource has been tweeted and retweeted. You may not always

know how the OER is being used, but you can certainly find out where and when it is being used. It will also be useful for you to collect this data for reporting purposes. Below are 36 indicators of OER impact:

- Peer review
- Physical book sales
- Student savings
- Download
- Website hits
- Adoptions
- Adaptions
- Media mentions
- Quotes in media
- Course enrolments
- Course completions
- Rabble rousing
- Social networking contacts
- Increased diversity
- Grants
- Student success
- Mention by policy makers
- Angry letters from important people
- Meeting with important people
- Protests/demonstrations
- Trending in social media
- Student surveys

- Student testimonials
 - Trust/reputation
 - Blog mentions
 - Faculty recommendations
 - Faculty award/prize
 - Influencing curriculum creation
 - Influencing the textbook market
 - Participating in public education programs
 - Invitations to present
 - Invitations to consult
 - Change in policy
 - Change in processes or behaviour
 - Thank you cards from students, parents or staff
(Holbrook, 2013).
-



Read: Visualising usage analytics: An evidence-base for open texts

This [blog post](#) shows how UniSQ Library is using Google Analytics and Power Bi to visualise analytics of their open textbooks. This post will inspire you on ways you track the analytics of your own OER.



Do: BCcampus Open Textbook statistics

[BCcampus Open Textbook statistics](#) is an OER publishing program that collects and shares metrics

about the books they've published. The program includes information about student savings, known adoptions, and the number of reviews for each book.

Explore the program and note what information they gather. Reflect on whether any of this information will assist you in evaluating your own OER.



Reflect: Sharing, promoting and measuring the impact of OER

Reflect on the below questions:

- How do you plan on sharing your OER? What platform will you upload your OER too? What

technical considerations are there?

- How will you measure the reach and impact of your OER? What evidence do you need to collect? Think about both quantitative and qualitative forms of evidence. Map this against the needs of your institutions or authors.
- How do you promote OER in your institution or how do you plan on promoting future OER?

Key takeaways

This chapter we learnt:

- where you can host and share your OER
 - importance of metadata in OER discoverability
 - how to promote and measure the impact and reach of your OER
-

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Copyright

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GLOSSARY

A note on attribution:

This glossary was adapted from the [Glossary](#) in [The OER Starter Kit](#) by Abbey K. Elder, which is licensed under a [Creative Commons Attribution 4.0 International License](#), except where otherwise noted.

Accessibility

Accessibility can be viewed as the "ability to access" something. The concept of accessible design and practice of accessible development ensures both "direct access" (i.e. unassisted) and "indirect access" meaning compatibility with a person's assistive technology (for example, computer screen readers) ("Accessibility", 2022).

Alt text

A word or phrase that can be inserted as an attribute in an HTML (Hypertext Markup Language) document to tell website visitors the nature or contents of an image (TechTarget Contributor, 2012).

Attribution

The process by which a content user gives proper credit to the original creator of a work when a portion of that work is reused or adopted outside of its original context. Attribution typically includes a link to the original work and information about the author and license.

Backward design

A model for designing instructional materials where the instructor or designer begins the design process with a focus on the desired results (i.e., the outcome) of instruction (Learning Theories, n.d.).

Copyright

A set of intellectual property laws that give the rightsholder of a work (usually the author) exclusive rights over the reproduction, reuse, remixing, display, performance, and redistribution of their work.

Copyright license

A license permits users to certain rights over a copyrighted work. These can be exclusive (allowed for individual groups) or nonexclusive (allowed for all users). Licenses can be restricted by certain factors such as purpose, territory, duration, and media (FindLaw, 2016).

Course Learning Outcomes

The final outcomes that an instructor expects their students to gain by the time the students complete a course.

Creative Commons

A [set of open licenses](#) that allow creators to clearly mark how others can reuse their work through a set of four badge-like components: Attribution, Share-Alike, Non-Commercial, and No Derivatives

Derivative works

A work based on or derived from one or more already existing works. Common derivative works include translations, musical arrangements, art reproductions, and abridgments . (USLegal.com, n.d.).

Digital Rights Management (DRM)

Digital Rights Management is any system that allows publishers and vendors to impose limits on what users can do with digital material, typically e-books and videos. These limits are designed to restrict copying, sharing and reformatting

Digital Rights Management - free (DRM-free)

DRM-free resources eliminate the limitations of DRM and can be opened with ease on a range of devices and apps, and the files can be freely shared, edited, and reformatted – although copyright and licence conditions will apply.

Inclusivity

The practice or policy of including people who might otherwise be excluded or marginalized, such as those who have physical or mental disabilities and members of minority groups (Oxford Lexico, n.d.).

Learning Management System (LMS)

A piece of software that manages, analyses, and runs educational courses. Canvas and Blackboard are two popular examples.

Licensing

The process by which a rightsholder (usually the creator of a work) dictates that others can reuse their work in specific ways.

Open access

A model by which content creators make their scholarly

outputs free to access without cost to users. This can be done either by publishing content with an OA publisher or by sharing a copy of the content on an open repository.

Open educational practices

Practices which encourage the development of openness, community engagement, transparency, responsibility, sharing, and accountability in education (“Open Education Practices”, 2016).

Open educational resources (OERs)

Free educational materials that are openly licensed to enable reuse and redistribution by users.

Open educational resources (OERs) collections

Repositories of OER materials.

Open educational resources (OERs) metafinders

Online tools that search multiple OER collections to locate OERs.

Open license

A copyright license which grants permission for all users to access, reuse, and redistribute a work with few or no restrictions.

Open pedagogy

A set of pedagogical practices that include engaging students in content creation and making learning accessible to all.

Open science

An umbrella term for a movement comprised of a variety of practices aiming to remove barriers for sharing any kind of research output, including resources, methods, or tools created at any stage of the research process (Bueno de la Fuente, n.d.).

Open source software

Software with source code that anyone can inspect, modify, and enhance (OpenSource.com, n.d.).

Open textbook

An openly licensed and free to access textbook; an OER meant to be used as a textbook for a course.

Open textbook collections

Repositories of open textbooks.

Public Domain

A work which is not covered under copyright law, whose copyright has expired, or which has been dedicated to the public domain by its rightsholder is said to be in the public domain.

Student Learning Outcomes

The outcomes that an instructor expects their students to display at the end of a learning experience (an activity, process, or course) (Elhabashy, 2017).

Universal Design

A process intended to design products that are usable by all people, with or without disabilities, to the greatest extent possible (Edyburn, 2010).

Universal Design for Learning

A framework to improve and optimize teaching and learning for all people based on the concept that, by providing multiple ways of engaging with content, the diverse educational needs of learners can be met.

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ACKNOWLEDGEMENTS

Publishing this book would not have been possible without the support of CAUL staff, Kate Davis and Cicy Zheng, and the CAUL Enabling a Modern Curriculum Project Sponsor, Fiona Salisbury, all of whom guided and supported the development of the content.

The contributors are also grateful for the support of their employers, who gave us time and space to commit to this project. Thanks to the Library teams at each of Federation University Australia, Flinders University, La Trobe University, Queensland University of Technology, University of Adelaide, University of Melbourne, University of Southern Queensland and University of Western Australia for the opportunity to participate in this project.

Most of all, we would like to thank the OER Community: the many pioneers and practitioners who have created and developed this movement and on whose work we have drawn. We hope this book helps further the development of capability and practice in Australia and Aotearoa New Zealand, so that the community can continue to flourish.