**The Open Education Resource (OER) Handbook**

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Edited by Vesna Mirkovich

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| PREFACE |

## 

## What Is an OER?

Open Educational Resources (OERs) are defined as “teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and repurposing by others. Open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge” (The Williams and Flora Hewlett Foundation, n.d.).

A common misconception about OER is that OER materials are simply freely available materials, often online. However, the “open” in Open Educational Resources goes one step further, as described in the Hewlett Foundation definition, and grants specific permissions *in addition to* the free availability of the material to users of OER. Simply put, “Open” = free + permissions. The five *R*’s of Openness framework described by David Wiley (2014) gives us a clearer picture of what kinds of permissions should come with OER:

* **Retain**—the right to create and control copies of content
* **Resuse**—the right to use content in a range of learning environments
* **Revise**—the right to adapt the content (e.g., to translate)
* **Remix**—the right to combine the existing content with other existing or original content, thus creating something new
* **Redistribute**—the right to share copies of the above items

**Additional Goals**

The following elements of openness were driving factors during our project:

* **Usability**—Our materials are intended for both credit- and non-credit-bearing courses and are neutrally applicable for many contexts of further learning.
* **Audience**—These OERs were designed for use in Alberta, but the open licenses the material is published under allow for the internationalization of the material. Adopters may localize the content by replacing the Canadian examples with examples that better suit their own context.
* **Context**—When developing OER, it is not possible to design materials that fit all learning contexts equally. Therefore, we developed these materials for a first- or second-year college course as the most likely use case. We researched the knowledge, skills, and attributes (KSA) associated with competencies defined and provided for the project, and used KSAs to inform the development. We also strove to keep the content flexible enough to work in a face-to-face, blended, and fully online learning environment.
* **Presentation**—The content is intended for the first-year college or university learner, and its readability has been considered with this level in mind. We aimed for quality video, audio, and imagery. The material is accessible on mobile devices and conforms to elements of Universal Design for Learning (UDL) and eCampus Alberta 2.0 standards.
* **Reuse and Remixability**—Our content was developed with commonly available and, where possible, open-access software so that it may be remixed and resused by instructors with varying comfort levels with technology.

There is no single standard for the design and development of OERs, so for us it was important to establish guidelines and context to ensure the content would be useful and adaptable to a wide audience.

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| ABOUT THE PROJECT |

## 

## Our Team

## Our project was facilitated by Olds College in Alberta, Canada. Our curriculum development team consisted of JR Dingwall, Chuck Labrie, TK McLennon, and Laura Underwood, and the materials were edited by Vesna Mirkovich. Development was supported by Stacey Layden and Andrea Mix from Olds’ Educational Technology and Curriculum Team and was supervised by Gordon Gilchrist and Ralph Troschke.

The skillset of the team ranged from content knowledge to graphic design and curriculum development and instructional design skills, with some overlap of skills between team members. This overlap was helpful during development, because it allowed us to share responsibilities.

## 

## Project Overview

The goal of the project was to develop OER for use in *workplace communication* courses, which we later renamed *Professional Communication*, because, based on our early research, “workplace communications” seemed to have exclusive connotations for preparing non-English speakers or new Canadians for the bricks-and-mortar workplace. We suggested to the project sponsors that *Professional Communication* was more inclusive and aligned with the stated goals of the project. Further, given that the worksite as a location is constantly changing as more and more people become freelancers, consultants, and other types of flexible workers, we felt that *professional* *communication* would be more representative of current work environments.

One of the challenges we faced early on was giving this project a shape. The lack of a “normal” approach of having a completed needs analysis in hand before getting to the design and development on the materials was both a challenge and opportunity for our team to think outside the box. Initially, the two people responsible for subject matter expertise got to work on research, then ideation based on that research. We paid particular attention to what was missing from typical communications-related courses and overlaid that with communications-related challenges we know most people face in the modern workplace.

Our team’s initial vision included six modules: Foundations, Writing, Presentations, Interpersonal Communication, Technology and Communication, and Career Readiness. We envisioned a set of resources that would include an eText and ancillaries (e.g., activities, assessments, and presentations) that could be useful to three main categories of people: students, instructors, other independent learners or interested parties (e.g., technology or OER researchers). Because this was meant to be a digital-native project, there was some initial confusion within the team about how this resource could be useful for both blended and face-to-face learning. The initial vision also included some draft learning outcomes and objectives that were mapped against a competency profile provided by Olds College to ensure that at the very least, the material would be useful and relevant for Olds College students. The final element of the initial vision included a discovery tool that would allow users of the resource to answer a few initial questions and thus direct users to the content and resources they needed.

Ultimately, we built our OER around four modules: Foundations, Writing, Presentations, and Interpersonal Communication, with the consideration that instructors might be teaching a course on one of the topics, or a course that blended elements from each. We would have liked to have developed the discovery tool and the two additional modules (Communicating with Technology, and Career Readiness Communication), but time constraints did not allow this.

As mentioned earlier, the OER was approached not as a course, but as a set of resources that could be adapted into an existing course or used to create a new course from scratch. The exercises and activities provided exceed what might be used in a typical three-credit (13-week) post-secondary course. The intention here was that instructors would take the material and adapt it to their needs and the needs of their students, rather than use the material verbatim and precisely in the order presented.

Again, we have not specified that our content is intended exclusively for instructors. Instead, we felt that it may also be used by independent learners looking to update a specific skill. We also have not specified that our material is intended for face-to-face, online, or blended courses; however, it could be used in any of these scenarios.

## What’s Inside

Our OER includes the following materials:

* Instructor Notes and Guidance
* eTextbook
* Assessments and Rubrics
* Activities and Exercises
* Slide Decks
* Lecture Notes
* Videos
* Other supplementary content such as infographics, job aids, and handouts

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| DEVELOPING AN OER |

## Planning the Project

As you work through an OER development project, you will want to decide on a process to follow. The process we used had the following stages:

1. Discovery
2. Planning
3. Content
4. Development
5. Testing
6. Launch
7. Maintenance

There are many project management frameworks used in course development and related project types. You may have heard of Waterfall, Agile, PRINCE2, and other frameworks, for example, which may be appropriate for you, depending on who you are working with and what you aim to develop. For us, this general order and process aligned with what some of our team members had used previously, so we chose to adopt it for our project.

## Discovery Phase

In this phase we got warmed up, found out about the project’s aims, and got to know one another. Our team members worked from various locations and have never met in person. So, one of our first steps was to line up a video chat (we used Google Hangouts for meetings throughout the project) to establish each person’s role, interests, and specialisms.

The high-level protocol for managing this project included regularly scheduled meetings, primarily on a monthly basis, between members of the development team, Olds College managers, and staff. These meetings were used to inform on progress, communicate issues that could affect the project, and make the development team members aware of anything that had direct implications on the development process and their work. Without these meetings, or simply relying on electronic “check-in” style feedback, the development team may not have been fully aware of important and significant issues.

Olds College managers and staff took a “hands-off” approach and did not micromanage the work or process used by the development team. This approach suggested confidence in the team and confidence in their ability to manage the development process on their own. Having a more “hands-on” approach would not necessarily have affected the quality of work but could have attributed to delays while the development team adjusted their working style in order to conform. It would appear that the development team was able to demonstrate to Olds managers a good working relationship, which most likely added to a sense of confidence.

The development team decided to hold regular weekly meetings. This was a key part of the development process. Even though the team was able to communicate regularly in other ways using electronic tools, these weekly meetings were instrumental in keeping the project work on track. Without these informal meetings, work might have been delayed.

Engaging in these weekly team meetings gave us the opportunity to more thoroughly discuss our primary work within the context of what other team members were working on. Not having these scheduled meetings might have reduced the quality and consistency of the final deliverables, potentially compromising the usability of the end products. Regular team meetings also prevented the materials from becoming disjointed—which would have made them less fluid and cohesive as a package.

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| Key Takeaway |
| You’ll need to have a fairly solid project management plan at the beginning of your project, deciding how you will track responsibilities, the progress of tasks, and how often you will do a synchronous check-in with one another. |

### Research

One of the first tasks we took on was to research courses on workplace communication, professional communication, business writing, and related topics. We collected the syllabi of these courses and looked for recurring themes. We knew that if many courses were covering a particular topic, we would need to incorporate that topic into our material. We also reviewed the material for two existing workplace communication courses that Olds College currently offers, as we wanted the instructors at Olds to be able to use the OER material in their courses if they so choose. So, we needed to make sure the learning goals and main topics of those courses would be covered in the content we developed.

We created a third-party contents index so that we could make notes of any open-source or Creative Commons–licensed content from these courses and others that we were interested in adapting into our course. For us, this was a Google Sheets spreadsheet with the following columns:

* Type (of media, e.g., textbook)
* Source (creator, e.g., Olds College)
* Link
* Description
* Copyright (license, e.g., Public Domain)
* Notes

Our Subject Matter Experts’ (SMEs) previous teaching experience also came into play, as they considered which skills were frequently lacking in their undergraduate students. Grammar and writing mechanics was a concern here, as were basic computer skills. They also looked at their own course syllabi to for correlations and recurring themes.

### Audiences

Before we could be certain about the content we would need to include, we had to establish who our target user(s) were. One of the more challenging aspects of developing a set of open resources like this is that you can’t be sure how the material will be used, once you make it publicly available. In typical course development, you are building a course alongside a specific set of instructors with whom you have direct contact with, and a specific learner demographic who are coming in after completing defined prerequisites. However, in the case of this OER, information about who these people are, what they do and do not already know about the subject, how the course will be delivered, and the constraints that may limit it, were unknown.

We decided to aim our materials toward first-year general communications courses at Canadian colleges and universities. Our primary target users were the instructors of these courses and their students. The learner-facing material was written to the student directly. Our secondary user group was independent learners, assumed to be working professionals whose jobs required them to learn some communication skills. Although we made these targeting choices to make our scope of work more manageable, this is not to say that people outside of these demographics cannot use our resources—in fact, we hope they do! We would like to see institutions outside of Canada, for example, to adopt these resources and provide some feedback about how the contents could be more internationally accessible.

## Planning Phase

In the planning phase we established a structure for our material and divided up responsibilities. In our case, though each of the core team were assigned specific roles when we were brought on board (Subject Matter Expert, Instructional Designer, Curriculum Developer) with two of us in hybrid roles, in reality we all contributed wherever needed. If you are working with a larger team, roles may be more rigidly defined, but for our small team, this worked well.

### Concept and Structure

The SMEs grouped the topics we had discovered during our research and came up with the following six distinct modules.

* Foundations
* Writing
* Presentations
* Interpersonal
* Technology
* Career Readiness

Dividing the material into modules made production more manageable, as we could then work through “sprints” to complete each module in turn. Doing this also helped us to define what was in and out of scope.

### Web Presence Options

At this point, we also considered options for putting the content online. We knew that we wanted a platform that would support searching and filtering of the learning assets. We expected that the OER might, at some point, be incorporated into a repository with other OERs developed in Alberta, but there were no immediate plans by the funding government body to do this. So we looked at the following options:

* Google Sites
* Wordpress
* Wiki
* Equella

#### Google Sites

[Google Sites](https://www.google.com/work/apps/business/products/sites/) is a template-based site editor, part of the Google Apps suite. It integrates with other Google services (e.g., Google Drive and YouTube).

**Benefits**

* Front-end editing
* No programming knowledge needed
* Integrated with Google Docs
* Offers stable platform that is likely to remain so indefinitely, even though functionality could change
* Three user levels: owner, viewer, collaborator
* Can insert videos, docs, spreadsheets, presentations, photo slideshows, and calendars (from Google Drive/YouTube)
* Has a wiki template
* Includes Blogger
* Offers the ability to create a site and then share it as a template to the domain (i.e., team can save it as a template and reuse it by creating a new site based on the original)
* Users can create a centralized repository called a file cabinet, where they can upload files, link to documents in Google Drive, and create hyperlinks

**Caveats**

* Limited functionality/design customization options
* Storage quota
* Files can only be up to 10MB in size
* Need to download/copy-and-paste content out if it needed to be moved
* Will not support a searchable asset database
* Once you create an announcement, it is published; there is no draft feature
* No ability to schedule posts
* No direct integration with social platforms
* Gadgets can be discontinued/disconnected

#### Wordpress

Sometimes thought of a just a blogging platform, Wordpress has developed into a full Content Management System (CMS) over the last few years (approximately 21 percent of the top 10 million sites are built on Wordpress). Complex websites can be built with it, and plugins are available to extend its functionality.

A self-hosted version of Wordpress (via [Wordpress.org](http://wordpress.org), not Wordpress.com) is a better choice, as this gives complete control over styling and functionality. We expected that the quality of the content we produce would, in part, be judged by its presentation, so the layout and design of the repository was an important consideration for us.

**Benefits**

* Complete control over design and functionality
* Flexible and extendable through plugins and theme changes
* Easy to use
* Content can be downloaded/exported
* Reasonably quick setup (depending on functionality and design spec)
* Can be password protected while in development
* Draft functionality
* Multiple user roles/levels; contributors can add to the site without coding
* Can embed virtually any type of content (videos, images, Google Drive files, HTML5, etc.)
* Will support a searchable asset database
* Could add a wiki-style page to the Wordpress site, for project FAQ or other details
* One of the five R’s is “Remix.” Wordpress offers a way to build community and remix existing assignments (e.g., [UBC’s Teach Wordpress assignment bank](http://blogs.ubc.ca/teachwordpress/assignment-bank/), and the [DS106 assignment bank](http://assignments.ds106.us/)). Users can quickly view, download, reuse, remix, and share their remixes using these assignment banks
* No user password/signin required to be a consumer

**Caveats**

* Need server space in order to host the Wordpress install
* Some monitoring required; Wordpress software/security/plugin updates needed on occasion (incremental releases of the Wordpress core are automated, but major releases require manual update. Plugin updates require manual update. This is as simple as clicking an “update now” button and checking the site to make sure nothing has broken)
* Some programming knowledge needed, depending on functionality

#### Wiki

There are several different tools that can be used to create a wiki. For example, [MediaWiki](https://www.mediawiki.org/wiki/MediaWiki) (which is the software developed for Wikipedia). The following details use MediaWiki as the potential platform.

Since there is a wiki template in Google Sites and plugins exist to provide wiki-style pages in Wordpress, there was no obvious benefit to using a wiki over those two platforms.

**Benefits**

* Format will be familiar to anyone who has used Wikipedia before
* Front-end editing (no programming knowledge needed for editors)
* Can enable public editing if there is a desire for this
* Extendable with extensions

**Caveats**

* Requires server space
* Some monitoring required; software and security updates required on occasion
* May need to get familiar with [WikiMarkup](https://en.wikipedia.org/wiki/Help:Wiki_markup) for formatting
* Limited visual appeal, not much in the way of layout and design control
* PHP knowledge needed for setup/configuration

#### Equella

This is a commercial repository from Pearson with considerable licensing and maintenance fees. As far as we could tell, the Equella team does all the setup, design, configuration, hosting, and maintenance. A decision to use this had to be made by the governing body in charge of Alberta’s OER project as it only makes sense if used for a number of OERs. We could do what we needed using free, open-source systems and so did not put this forward, as it seemed counterintuitive to use an expensive proprietary system to host open materials.

#### Selecting a Platform

After consideration, we decided to use Wordpress, as members of our team had developed with it previously and could apply their experience designing and developing on the platform to this project. For us, it made sense because we had access to server space and knew how to set up the search and filter options we needed on Wordpress. The platform we developed can be found at p[rocomOER.org](http://procomoer.org).

### Learning Design

Beginning with the communications competency framework provided by Olds College, an environmental scan of similar post-secondary courses and other OERs, we were able to determine common themes and teaching practices in communication courses at the level we were focusing on. With this as a guide, we were able to create a framework for six module-level learning goals supported by proposed chapter-level outcome statements.

### Learning Goals and Outcomes

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| Key Takeaways |
| * All team members need a common understanding of terminologies such as what an OER is, what a learning outcome versus what a learning goal is, etc., to guide their work. Clarify the definitions of these for your project, at the beginning. |

Since there is much confusion and inconsistency in the terminology surrounding learning goals, objectives, and outcomes, it took some time to develop a common understanding around our own use of these terms for this project.

For each module, we began with holistic module-level statements or goals to address big-picture learning. Next, we reviewed the knowledge, skillsets, and abilities (KSAs) embedded in the goal statements to ensure they were appropriately covered. Module-level learning outcomes that describe how the KSAs can be manifested and confirmed as having been achieved were described next, which also informed the assessment strategy. Finally, we focused on crafting chapter-level learning objectives that focused on finer or more specific elements within the module-level outcome statements. In other words, the chapter-level objectives are distilled from the module-level outcomes into more detailed learning elements. These also inform lesson plans, since they provide more focus on what needs to be learned in the readings, activities, and assessments presented in the module.

The learning outcomes in each module are stated based on the cognitive knowledge development required to achieve the intended level of performance or competency. The phrasing structure is based on common convention of incorporating an ***action verb*** (Bixler, n.d.), followed by the ***condition of performance***, and then the criterion that defines ***the measure of quality***. This structure is used to

* contextualize assessments and learning activities,
* qualify performance measures,
* quantify performance markers, and
* guide the development of an evaluation strategy

Our module-level learning outcomes describe the end result of learning events and are typically preceded by “Upon successfully completing this module, you should be able to…,“ which helps to make them learner centred. The chapter-level learning objectives describe what is covered in a learning activity, such as a chapter or lesson, and are typically preceded with “Upon completing this chapter, you should be able to….“

The distinction between the terms learning *objectives* and learning *outcomes* is that objectives indicate what we intend to accomplish, while outcomes determine whether we did.

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| Key Takeaways |
| For constructing learning outcomes, remember the following:   * Learning outcomes define the action, condition, and criteria of performance that must be demonstrated. * Learning outcomes are modelled on Bloom’s Taxonomy (revised edition) and indicate the natural progression of cognitive development. * Learning outcomes are used to inform assessments and learning activities. |

### 

## Content Phase

For us, the content phase was the most time-intensive phase of work, as it is where we created the substance of our OER, namely, the eText. You may decide to focus your work on a different deliverable, though.

We had a content phase for each module and produced them in order. First, we had to break down the module topics into a series of chapters (for the purposes of the eText and supplementary materials). This way, it would be easy for instructors to incorporate the material they wanted and leave out anything that didn’t fit the remit of their course.

Our modules have three to five chapters each, and each chapter has an associated slide deck, lecture notes, and supplementary materials. Usually, we created two to three major assessments per module, as well as additional shorter activities and exercises.

To identify the subtopics for each chapter, our Instructional Designer facilitated a Task Analysis for each chapter with the SMEs.

### 

### Task Analysis

An adapted task analysis process was implemented in order to

1. revise or specify the learning goal associated with a specific chapter,
2. identify concepts within the domain of knowledge represented in the learning goals,
3. identify example tasks that learners might complete to demonstrate achievement of the learning goal,
4. identify common misunderstandings and prerequisite knowledge for given tasks,
5. create learning objectives that support the learning goal, and
6. sequence concepts according the progression identified in the learning objectives.

This process took the form of two-hour intensive meetings including the instructional designer and the subject matter experts. The instructional designer facilitated discussion between the SMEs, attempting to uncover the enduring understandings that were the kernel of learning goal. As a non-subject matter expert, the instructional designer is in an advantageous position to pose questions that provoke SMEs to articulate how an expert thinks through the example tasks, building a scaffold for learners to utilize in the learning materials.

### eText

Once we had a clear idea of what each chapter would be about and what the subtopics were, we inserted headings and subheadings into our eText document to sequence the material. We used Google Docs so that each of us could contribute to the content simultaneously, as well as the Comments feature to flag queries for each other.

We remixed third-party Creative Commons material into our eTextbook where possible, as this gave us a good starting point to work from. We then did our own research to further develop the content.

Our eText also included:

* Citations
* Check Your Understanding
* Learning Highlights
* Further Reading
* Graphics
* Front Matter

#### Citations

We chose APA formatting. MLA, Harvard referencing, and Chicago style are other popular choices. Whichever citation style you choose, it’s best to select it early on so that you can format as you go. If you’re new to APA formatting, you might find our [APA citation reference](http://www.procomoer.org/writing-post/apa-citation-reference/) helpful. You might also find a citation manager like RefWorks or EndNote helpful for tracking your citations.

#### Check Your Understanding

To provide learners with an opportunity to self-assess their grasp of the material, we placed “Check Your Understanding” points throughout the eText chapters. These sections consist of multiple-choice, matching, or short-answer questions covering the topics discussed. We also compiled all of these questions into a Question Bank for each module, where instructors can switch questions to focus on particular concepts or construct other quizzes for assessment purposes.

#### Learning Highlights

We ended each chapter with “Learning Highlights.” These are points that should be emphasized in each chapter and could be considered as the key takeaways that students should extract from the reading.

#### Further Reading

In case students or instructors wish to take their exploration of a particular topic further, we included a “Further Reading” section at the end of each chapter, linking out to external resources, supplementary material, and any material that we could not incorporate into our content because of licensing restrictions. This may be particularly helpful for research purposes if instructors wish to develop a full course based on one of the modules.

#### Graphics

We drew all the graphics, charts, and tables incorporated into the eText. Even if we were using a pre-existing graph, we cited it and then, where the terms of use or license allowed, redrew it using our chosen colours and fonts to ensure a consistent visual style throughout the OER.

#### Book Covers

We generated the eText in two versions—by module, so that each module has its own book, and in one complete book containing the eText chapters for modules 1–4. We assumed that providing two versions would make this asset more flexible for instructor use. We created a cover for each module book, and a variant for the complete book, so that if listed in an eBook library (e.g., on iPad or Kindle), the book thumbnails would display with covers.

#### Front Matter

The front matter for our open textbook includes a one-page description of the copyright notice and information. This is where we included the general license for the book (note that because content was drawn from a variety of sources, there are varying permissions for each chapter dependent on the inherited Creative Commons licenses, and citation information). The front matter also includes a contact information, which is a key element for digital textbooks, as it provides a way to obtain more information about the resource and also provide feedback. One of the most important elements of this feedback is letting the contact know when the book has been adopted.

The second page of the front matter generally will provide details about the project in general: who funded the project, why, who facilitated the project, who developed the materials, etc. Providing this context gives downstream users a more holistic view of the materials in general.

## Open Textbook Content

The actual content of the open textbook may be entirely created by the development team or be an adaptation of an existing open textbook. In the case of this project, our development team wrote some original content, adapted existing content, and remixed content from openly licensed sources. What are open licenses? you ask. Read on.

## Types of Licensing

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| Key Takeaways |
| * You’ll be releasing your content under an open license, so, knowing the ins-and-outs of copyright and licensing is critical because it will tell you what you can and cannot use, and how. If you have a librarian available, bring them on board; they’ll be your best friend on this project. |

In Canada, copyright automatically applies to creative works. If I wrote a book today (2016), then the copyrights to that work would be the duration of my life plus 50 years. If someone wanted to use or adapt that work, they would have to seek my explicit permission for that use—unless their use fell under fair dealing, which can get complex, so we strongly recommend that you see a librarian at your institution. Generally, the librarians in your institution will be a great resource on a project like this. “Open licenses” provide one more layer on top of copyright that allow specific permissions, enabling wider uses of works, that the creator provides users without having to communicate with every single user. The most common type of open licenses are from Creative Commons. Creative Commons provides six different license types, each with specific conditions that you must satisfy if you wish to engage in any of the five R’s (as described earlier in this handbook). For a short primer on Creative Commons you can refer to [this part in our book](https://docs.google.com/document/d/1TczeyBBBtCjKzyLwKhiWTvwvj-DMsEvCsY8r4jGeaoo/edit#heading=h.4gme6jxlzwu7), or for more details visit <http://creativecommons.org>. Copyright, fair dealing, and Creative Commons can be a tricky and sometimes overwhelming consideration, so if you have questions, keep your librarians on speed dial.

## Finding and Selecting Third-Party Contents

From the beginning there was a conscious attempt to adopt Creative Commons–licensed content. Early on we put together a spreadsheet in Google Docs (Google Sheets) that would help us put the links to the content in the appropriate categories.

It took some time to find reliable sources of information that were OER friendly. As time went on, we found sources with open licenses that were relevant to professional communication, and these were added to our third-party resource list. We mostly relied on sources from Lardbucket, Boundless, and, to a lesser extent, The Saylor Foundation. Many of the existing databases of OERs are difficult to use because they contain several elements that are not truly open to being reused, remixed, or shared; contain information that is out of date; or contain questionable files (with mystery-meat filenames; i.e., you don’t know what you’re getting) that have to be downloaded in order to be viewed. It took significant time to sift through and identify usable sources. Even then, some sources of information were changed to being no longer “as open,” and some sources disappeared altogether (e.g., opentapestry.com) with no warning or fanfare.

## Finding Images

The majority of images found for the storyboards/videos were sourced from Flickr. Within Flickr there is a drop-down menu called “Any License,” which allows you to limit your search results to certain categories. In this case, Commercial Use and Modifications was the category selected in order to limit search results to images that were either CC-BY or CC-BY-SA. Though [Creative Commons images](https://search.creativecommons.org/) ([how to find images using the Creative Commons search tool](https://drive.google.com/open?id=1ENkgqP18xUqSSsqUCQpor2F5nBwQBVDKa5jyjt5X91I)) has more image search options available, Flickr was found to be the most useful and fairly user-friendly for our purposes.

What also helped when using Flickr was to pay attention to the tags used in photos to get a better idea of helpful search terms for future image searches. For example, if you wanted an image of someone delivering a speech in a corporate setting, you could add the term “indoors,” which would cut out speeches that typically happen outdoors at places like political protests, concerts, festivals, etc.

For more general guidance on finding images to use in your project, see [A Picture Is Worth 1,000 Words: Using Visuals](https://docs.google.com/document/d/1TczeyBBBtCjKzyLwKhiWTvwvj-DMsEvCsY8r4jGeaoo/edit#heading=h.wzplcwpi6mi6).

#### Finalizing the eText

Once our SMEs finished drafting content, we worked through the eText as a team to resolve any issues or queries. An overview was written and placed at the start of each module, and citations were checked and correctly formatted. We also formatted the document to align with our chosen font size and style, headings, line spacing, links, table cell background colours, and so on. From here, the material was handed over to our copy editor, who worked through it using our house Editorial Style Guide to ensure consistency, and any queries from her were returned for final revisions by the team.

To provide greater access to the material, the Google Doc eText can be easily downloaded as a Word document, PDF, or ePub as well as a few others. We would have also liked to produce an iBook version, but time constraints did not allow this, as we would have needed to use iBooks Author to generate interactive versions of the books.

### Assessments

In addition to the eText, we produced assessments (formative and summative) for each module.

The terms assessment and evaluation are often used interchangeably but can describe two very different intentions. In our project, assessment refers to both measuring the progress of student learning *and* evaluating levels of knowledge, performance, and abilities. Adopters of the OER materials are left to decide how the results of assessments will be used in grading. Our assessment strategy is modelled on the notion of constructive alignment where learning outcomes inform assessments that, in turn, inform learning activities.

Two forms of assessment instruments are included in each module: *formative* and *summative*. Although the design of each can accommodate student evaluation or grading, the summative assessments provided are better suited to this.

Assessments included as part of any OER should be designed so that they incorporate easily or naturally within an existing student evaluation strategy. The most common approach in achieving this is to use rubrics to outline the evaluation criteria and methods used with the assessment tool. Except for module question banks, each assessment instrument includes a rubric. These rubrics work well for both formative and summative evaluation and adapt well to different marking schemes.

Whenever practical, our assessments incorporate elements of authentic learning. Our focus was on higher-order thinking, depth of knowledge, and connecting learning to the real world. This is different from traditional assessment approaches in several ways. These include contextualized tasks, complex tasks, presenting tasks from different perspectives, accepting different solutions, and reflection.

### Instructor Guidance

The final portion of text-based content was the instructor guidance material. This includes the module overview, assessment guidance, and instructor guidance documents.

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| Top Tips |
| * Get a librarian on your team; doing so will help with sourcing good materials as well as understanding rights, permissions, and attribution for Creative Commons. * If you are creating an open textbook, create a framework of sections and topics that should be included. * Search for openly licensed content (preferably public domain or CC-BY) for those topics already existing and determine if you will reuse, remix, or revise that material. Where material does not already exist, you will need to develop it from scratch. * Keep track of any material you source, even public-domain material. You should keep track of the creator, the title of the work, the type of license it was previously shared under, and a direct URL to the work. This is critical in properly attributing the work and will save you time in the long run. |

## Development Phase

Once the eText and assessments were complete, we developed the peripheral contents. For us, this consisted of slide decks, lecture notes, videos, and other supplementary material.

### Slide Decks

To produce slide decks, we used Google Slides, as this offers commenting ability and tied in nicely with our existing workflow. We selected a layout template and designed or sourced a series of icons that could be used repeatedly to provide visual interest and consistency throughout. We did not use a defined timeframe for each of our slide deck “lessons,” as we expected that instructors would amend them to the length of time they had available for each topic. Each chapter has its own slide deck; some would take longer than others to work through.

Here are some guidelines to consider when producing slides:

* Limit to one idea per slide.
* Use visuals over words, whenever possible. The intent is not to have the class read from the slides; they are a visual aid. Display key words only, not blocks of text.
* Use bullet points.
* Aim for readability. Choose a common font in a large size and make sure there is high contrast between the font colour and background colour so that your slides are easy to read—even from the back of the room.
* Use a consistent layout, fonts, and colour scheme throughout.
* Avoid too much decoration. Transitions, animations, sound effects, novelty fonts, and so on only serve to distract from the main message.
* Place tables, graphs, and charts on their own slide and ensure they are large enough to be read.

### Lecture Notes

To accompany our slide decks, we wrote lecture notes, divided into “Lecture,” as in the comments that the instructor might make with each slide, and “Notes,” which are points for the instructor’s information only. We introduced each lesson by pointing the instructor to the activities and supplementary materials that they might wish to use along with the lecture.

Our lecture notes appear in their own separate document, as well as in the slide deck in the form of presenter notes.

### Video

We created a short introductory video for each chapter and included this at the beginning of each lesson’s slide deck. Our videos are each between two to four minutes long. To develop the videos, we first wrote a script, extracting the key points from the eText. Next, we put together a storyboard, making notes of links to Creative Commons–licensed photographs or graphics that we wanted to use. With this completed, one of our SMEs recorded the script as an audio file on her iPhone and sent it in for production via email as an attachment using the same phone.

We took the images into Photoshop to edit, crop, or remove the background, exporting them as jpg or png (for transparent background). We then created a project in After Effects, loaded the audio and image files in and animated accordingly, editing the length of the visual displays to line up with the audio file.

We sourced royalty-free audio clips for our intro/outro music and sound effects, then exported the video in mp4 format and uploaded to YouTube.

### Supplemental Material

Each module contains supplemental material such as job aids, infographics, and handouts that were developed to aid understanding of the lesson concepts. In some cases, these are straightforward worksheets, such as the [parallelism worksheet](http://www.procomoer.org/writing-post/parallelism-worksheet/) from the grammar and punctuation chapter. In other cases, we developed infographics, such as the [writing process infographic](http://www.procomoer.org/writing-post/writing-process-infographic/), and tip sheets, such as the [speaking anxiety tip sheet](https://drive.google.com/file/d/0B3IVvwBUCTdCNktzcFMzQXZwd0E/view?usp=sharing) from the presentations module.

## Testing Phase

In the testing phase, we completed final checks on the material, such as the following:

* Ensuring consistent formatting (spacing, headings, colours, footers)
* Adding figure numbers
* Completing front matter
* Checking file names and file types

### Handover

We compiled a handover README file for each of the modules, when they were ready to be handed over to our facilitators at Olds College. This consisted of a list of the chapters, and links to each file, in order, so that these could be easily accessed for proofreading and feedback.

### File Types

Technological choices can affect how your resource will be used. You can’t be sure which devices your users may want to view the material on. Our first choice for development was Google Docs because it provides a platform that is widely shareable and editable. These documents can live online and also be downloaded as .docx and .rtf files.

Another avenue you may wish to consider for co-authoring and self-publishing content is [Pressbooks](http://pressbooks.com/). Pressbooks allows you to write in a web-based platform that allows for simple navigation, readability, and searchability. In addition, Pressbooks also allows you to export your work in multiple file formats such as ePUB, PDF, and MOBI (Kindle).

## Launch

In this phase, we launched the OER. To help us gather information about how it was being received, we incorporated a feedback form onto the web platform and installed Google Analytics to get an idea of the level of interest and activity on the website.

#### Promoting the OER

Once the OER is launched, Olds College instructors will have the opportunity to trial the material and provide feedback about how it has worked with their students. Additional promotion will be undertaken to let other institutions know that the material is available and can be used by their instructors. Promotion is tremendously important because of the sheer volume of material available online. We cannot expect to simply launch the material and gain significant uptake overnight.

## Maintenance

Once we had launched the OER, we wanted to find out how the material was being used and gather feedback from instructors and students who were using it. Olds College secured an Implementation Grant to pilot the OER with their instructors, a method that we hope will generate valuable feedback about the material.

We would have liked to incorporate a round of testing, with existing students as a focus group, and then revise the OER based on feedback. But this was not possible within the scope of our remit.

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| LESSONS LEARNED |

## Introduction

We learned a few lessons that, we hope, will save you some time and trouble as you embark on your own OER project. You can find more information about these lessons elsewhere in this document, as we explain how the process worked, for us.

It took us longer than we had hoped it would to hand over the first module (Foundations). This was, in part, because of the differing goals and perspectives of the members of our distributed team. While most of us had previously worked remotely or within a partially distributed team, this one was a particular challenge because we met one another for the first time over a Google Hangout and were not actually in the same location at any time during the project. If possible, we would recommend at least one face-to-face, workshop-style meeting at the start of the project, to begin the brainstorming process and establish each team member’s interests, skills, and goals.

We were also in multiple time zones, which made scheduling meetings slightly more tricky than usual, although it was helpful in other ways. For example, one of our team members was in a time zone between five to seven hours ahead of the others for most of the project. This meant that she was often close to the end of her work day when others were beginning and so could hand over completed work, and we felt generally more productive. But this also meant that the later starting team members had to try and address outstanding queries that could hold up her work in the following day, because she would not be able to get an immediate response.

Having come into the project with different interests and specialisms, we needed time to get into a “flow” and get used to one another’s working styles and methods. Some of us came in with a focus on theory, and others with a focus on practice, leading to differing opinions about which elements should take priority. To avoid this in your own project, we would recommend that you clearly define the big picture and the expected deliverables at the outset. You can do this by answering questions such as the following:

* Do the funding organization require strategy documents?
* Have learning outcomes already been defined, will they be derived from an existing course, or do they need to be written?
* Is an eTextbook a priority over multimedia items?
* What list of deliverables does the funding organization want as a first priority, and what deliverables are simply “nice to have”?
* What skills do each of the team members have?

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| Key Takeaway |
| * Having the right balance of skills is key on projects like this. You’ll need subject matter expertise, instructional design and curriculum development skill, writers and editors, and production skills such as graphic and interactive design. You may also need video production and editing support. |

## Common Understanding

Like many industries, Education is fraught with jargon. One of our challenges was in establishing common understandings about curriculum development terms and their implications. Initially, a lot of confusion around distinctions between learning objectives, learning goals, learning outcomes, and the intricacies of Bloom’s taxonomy were evident. It took time for all team members to get on the same page, and it’s worth taking time and encouraging patience to let that happen.

## Timeline and Budget

There will always be something else you would have liked to do on projects like this—and never enough time or budget to do it in! Ours was no exception. We found that we had about a six- to eight-week turnaround for each module, after we had been through the first one, all of which took about 12 weeks to complete.

Generally, the more people are involved, the more time is required to get consensus. So, from this perspective, we were grateful to be a small and agile team.

## Scope Creep

One of our initial struggles was that we didn’t have clarity about the scope and deliverables of our project from the beginning. This cost us time and energy on tasks that were not the priority. If possible, list the deliverables that you are expecting to hand over early on, in order to prevent misunderstandings.

We found it particularly challenging to narrow the scope of the Interpersonal module, which had the potential to become too interdisciplinary, incorporating ideas from the fields of psychology and sociology as well as more theoretical elements of communication. The task analysis along with module level learning outcomes were especially useful here to help us remain within the scope of more practical interpersonal communications-related areas, even if they did overlap a bit with other disciplines.

The supplemental items we included could also have been expanded considerably. We tried to create two to three of these worksheets, infographics, and other job aids per module but could have easily produced more.

Finally, it’s important that team members establish enough of a rapport to be able to provide and receive constructive criticism. In our case this helped us to identify and efficiently reign in any situations where one or some of us felt that we were on the path to scope creep.

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| Top Tips |
| * Having (or making) some semblance of a needs analysis would save time and help to define a framework for the OER project. * Communication is key. Regular meetings as well as leveraging technology for project planning and monitoring are valuable. * Communication is also key to developing a common understanding among team members; such communication will not only lead to team synergy but also facilitate the ability to be constructive and honest. * A small agile team works well in situations where things are a bit more ambiguous or not well defined. * It’s important to establish top priorities and deliverables early on to avoid too much disappointment, should the project run out of time, money, or both. |

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| TOOLS AND RESOURCES |

## Tools We Used

We used the following tools during the process:

### Project Management and Collaboration

* Wunderlist
* Slack
* Google Hangouts
* Doodle (initially to define meeting availability)
* Google Calendar
* Google Docs (For meeting agendas and minutes)

### Documents

* Google Drive (Docs, Slides, Sheets)
* Pressbooks (To test file export options)

### Media Production

* Adobe Photoshop
* Adobe Illustrator
* Adobe After Effects
* GarageBand
* Wordpress

## Examples and Templates

These documents may be a helpful guideline when you are producing versions for your own project.

* [Storyboard Template](https://docs.google.com/document/d/1Xxc0DfQ62FkgEtZ1EyFXOSH2t8pJtUM943Ofsm65AmU/edit)
* [Editorial Style Guide Example](https://docs.google.com/document/d/1SGnVp0CMtyyZDsQqgcgREVUOfKVS1RSddgnSoXifUJM/edit)
* [Visual Style Guide Example](https://docs.google.com/document/d/14TZulK2XVCg7ell9m61QkPGpECuIDxsJIXcloaKk_6M/edit#heading=h.88khx3efwlyv)

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| FURTHER READING |

### OER Development Projects

[Campus Alberta OER](http://albertaoer.com/)

[BCCampus OpenEd Current Calls for Proposals](https://open.bccampus.ca/call-for-proposals/)

### Repositories

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| [OER Commons](https://www.oercommons.org/) | [Connexions](http://cnx.org/) | [MIT OpenCourseWare](http://ocw.mit.edu/OcwWeb/search/AdvancedSearch.htm) | [Lumen Learning](http://lumenlearning.com/open-courses-overview/) |
| [BC Open Textbooks](http://open.bccampus.ca/find-open-textbooks/) | [Open Math (U Waterloo)](http://open.math.uwaterloo.ca/) | [Open Course Library](http://opencourselibrary.org/course/) | [The Saylor Foundation](http://www.saylor.org/) |
| [Global Text Project](http://globaltext.terry.uga.edu/) | [College Open Textbooks](http://collegeopentextbooks.org/) | [Orange Gove Text](http://www.theorangegrove.org/OGTtest.ht) | [OpenStax College](https://openstaxcollege.org/books) |
| [OpenTextBook Store](http://www.opentextbookstore.com/catalog.php) | [Boundless](https://www.boundless.com) | [Open Textbook Library](http://open.umn.edu/opentextbooks/) | [Open SUNY Textbooks](http://textbooks.opensuny.org/category/available-now/) |
| [Shareable Online Learning Resources (SOL\*R)](http://solr.bccampus.ca:8001/bcc/access/home.do) | [OER Commons](https://www.oercommons.org/advanced-search) | [Creative Commons Search](http://search.creativecommons.org/) | [MERLOT II](https://www.merlot.org/merlot/index.htm) |
| [Librivox](https://librivox.org/) | [Solvonauts: the open search engine](http://solvonauts.org/) | [Physics Education Technology](http://phet.colorado.edu/) | [Jorum](http://www.jorum.ac.uk/about-us/) |

### Communities Organizations and Other

OE Global

Lumen Learning

Open Washington

OE Consortium

Africa OER

Hewlett Foundation

[BCCampus OpenEd](https://open.bccampus.ca/) is a pioneer in open education and includes many helpful guides as well as open textbooks.

[Cable Green’s Slideshare page](http://www.slideshare.net/cgreen) contains several up-to-date presentations where he makes the business case for OERs from a multiple stakeholder perspective.

Best practices for [Creative Commons marks and attribution](https://wiki.creativecommons.org/wiki/marking) approaches

[The OER Educator’s Handbook](http://wikieducator.org/OER_Handbook/educator_version_one)

[Creative Commons Search](https://search.creativecommons.org/)

## References

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Wiley, D. (2014, March 15). Clarifying the 5th R. [blogpost] Retrieved from <http://opencontent.org/blog/archives/3251>

The William and Flora Hewlett Foundation. (n.d.) Open Educational Resources. Retrieved from <http://www.hewlett.org/programs/education/open-educational-resources>

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