Working Group Guide

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Establish, run, and sustain an open working group

Lucas Wright and Krista Lambert

Michel Castagné, Amanda Coolidge, Caroline Daniels, Will Engle, Debra Flewelling, Grant Gregson, Michelle Harrison, Karen Meijer-Kline, Rosario Passos, and Hope Power

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This statement was last updated on February 28, 2019.

About This Guide

This is one of many support guides from BCcampus Open Education. It is designed to supplement the central resource: *Self-Publishing Guide*.

Welcome to the BCcampus Open Education *Working Group Guide*.

We consider this publication—along with our guides, toolkits, webinar slide decks, and other support materials—an open educational resource (OER). OER are defined as teaching, learning, and research resources that, through permissions granted by their creator, allow others to use, distribute, keep, or make changes to them. BCcampus Open Education views its support resources as openly licensed educational tools that *train the trainer*—typically faculty and staff—on how to build, customize, and use open textbooks and use open educational practices.

BCcampus Open Education began in 2012 as the B.C. Open Textbook Project with the goal of making post-secondary education in British Columbia more accessible by reducing students' costs through the use of open textbooks and other OER. BCcampus supports the post-secondary institutions of British Columbia as they adapt and evolve their teaching and learning practices to enable powerful learning opportunities for the students of B.C. BCcampus Open Education is funded by the British Columbia Ministry of Advanced Education, Skills & Training and the Hewlett Foundation.

The BCcampus Writing Guidelines for Articles and Web Content and the attached Style Sheet [Word File] were referenced during the copy editing and proofreading phases of this guide.

To ensure that standard barriers are addressed for maximum access by as many readers as possible, this guide meets the criteria laid out in the Checklist for Accessibility—including an Accessibility Statement—and is flagged as "Accessible" in the B.C. Open Textbook Collection.

This guide does not come with an index. Instead, use the search field located in the top-right of each page in the online version to locate a specific topic.

If you find an error in this guide, please report it using the Report a Textbook Error form. For other feedback or comments, contact BCcampus Support.

Preface

What is open education?

"Open education" is a phrase that encompasses a number of different activities in education and, depending on who you speak to, it can mean different things to different people. One useful definition of open education comes from the University of British Columbia (UBC), which defines open education as a "collection of practices that utilize online technology to freely share knowledge."

Under the umbrella of open education, there are a number of specific ways in which this sharing of knowledge happens in higher education. These practices can include the following:

- Publishing research in open journals (open access publishing)
- Releasing data to be reused by others (open data)
- Using, sharing, and collaboratively creating software and computer code (open source software)
- Flexible admission policies to institutions or courses (open admissions or open registration)
- Student assignments that promote student publishing or participation on the open web (open teaching or open pedagogy)
- Sharing of teaching and research practices (open scholarship)
- Sharing and reusing of teaching and learning materials (open educational resources or OER), including courses (open courseware) and textbooks (open textbooks)

While this is not an exhaustive list, it should give you an idea of the types of activities that the phrase "open education" encompasses.

Why open?

While the above definition and list should give you an overview of the type of practices that open education encompass, it doesn't answer the questions "Why open?" and "Why do educators choose to take on these activities and call themselves open educators?"

To help answer the question "Why open?," please watch this TedX Talk from Dr. David Wiley (15 minutes) and read the article Openness in Education [PDF] by David Wiley and Cable Green.

A YouTube element has been excluded from this version of the text. You can view it online here: https://opentextbc.ca/workinggroupguide/?p=4

What is open educational practice?

Open educational practice (OEP) is defined as teaching and learning practices where openness is enacted within all aspects of instructional practice, including the design of learning outcomes, the selection of teaching resources, and the planning of activities and assessment. OEP engages both faculty and students in the use and creation of OER, draws attention to the potential afforded by open licences, facilitates open peer review, and supports participatory student-directed projects.

Who is this guide for?

This guide is intended to be hands-on with practical strategies for running an effective open working group. You may be a new group that is starting out and looking for ideas, or you may be a well-established group that is looking for information on how to broaden your scope or measure the impact of open at your institution.

How is this guide organized?

The guide is organized into three sections. The first, “Establish a Working Group,” helps you lay the groundwork for putting together a team. “Run a Working Group” covers the tasks that you might be considering or working on in your group. “Sustain a Working Group” is worth (re)visiting throughout the life cycle of your group.

A word about the examples

The examples provided throughout this guide are from the following open working groups. You may wish to reference their public resources, which are available from the following links:

- British Columbia Institute of Technology (BCIT) Open Education Working Group
- Capilano University OER Working Group
- Douglas College: Open Douglas
- Kwantlen Polytechnic University (KPU) OER Working Group
- University of British Columbia (UBC) Open Working Group
- Emily Carr University of Art + Design Open Educational Resources (Currently, Emily Carr does not have an open working group.)
- Seneca College OER Committee
- Leeward Community College, Hawaii OER Committee (Note: At the bottom of the page are links to five pages that contain more information on the work and organization of this committee.)
- Canada’s Open Education Initiatives

Attributions

Acknowledgments

This guide was created through a collaboration between members of a number of open working groups in B.C. and BCcampus. It was developed with a team of librarians, educational developers, and instructional designers in 2017 and 2018. The group met twice virtually, and we worked together in two day-long sprints at the BCcampus offices. During the sprints, we completed a collaborative design process, during which we developed a vision for the resource, set goals, and created a table of contents. To read more about the sprint process, take a look at the sprint toolkit in Appendix 1 of this book.

The knowledge and ideas shared in this resource come from the approaches taken by open working groups throughout British Columbia. In particular, we want to acknowledge the writers and contributors including:

Michel Castagné, Capilano University

Amanda Coolidge, BCcampus

Caroline Daniels, Kwantlen Polytechnic University

Will Engle, University of British Columbia

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Michelle Harrison, Thompson Rivers University

Krista Lambert, Justice Institute of British Columbia/BCcampus

Karen Meijer-Kline, Kwantlen Polytechnic University

Rosario Passos, British Columbia Institute of Technology

Hope Power, Simon Fraser University

Lucas Wright, University of British Columbia/BCcampus

Using This Guide

We have included a number of design elements in this guide in order to make sure that this guide is both easy to follow and valuable to you.

Learning Objectives

For each section, there is a series of learning objectives that are intended to lead your learning while using this guide.

Questions to Consider

Throughout the guide, we have included sets of questions to provoke your thinking. Consider these questions as you complete the chapter.

In Practice

There are example boxes included throughout this resource to share ways that open working groups in B.C. post-secondary institutions have supported and advocated for open education.

Checklists

We have included a checklist at the end of each section. This checklist provides you with a way to set up, run, and sustain an open working group at your institution.

I

Establish a Working Group

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1.

Introduction

Learning Objectives

In this section, we will look at how to establish a working group. This information can help you establish a new open working group, formalize a current one, or refresh/restart one that has been struggling. We look at ways open working groups have been established in British Columbia and at some of the research about working groups and communities of practice.

This section will help you:

- Compare different community frameworks for establishing an open working group.
- Develop best practices for forming an open working group.
- Discover strategies for determining the purposes and goals of the open working group.
- Identify ways of establishing an inventory of open education and open educational resources at your institution.
- Identify funding sources for open working groups and projects.
- Identify resources and supports for open education at your institution.
- Learn how project management might assist a working group with its tasks.

2.

Frameworks and Approaches to Community

What is an open working group?

Open working groups are a great way to conduct advocacy and build momentum for open education in an institution. They bring together the people on campus that are interested in or already engaged in open educational practices (OEP). These groups are oriented towards particular tasks for a certain length of time. Some may revolve around a project like developing a Zed Cred or an Open Educational Resource (OER) strategy, and others may include cross-functional members in charge of distributing OER grants.

The term “working group” is often used to distinguish a group from something more formal, such as a committee or steering group. Many institutions purposefully choose the term “working group” to signify ideological driven action, with members working in partnership towards a common goal. You may choose to name your group something even less formal—perhaps, “[School Name]’s Open Champions,” or more formal like, “Open Education Committee.” The range of projects or initiatives your group is involved in may inform the name.

Define a working group

The term “working group” is used broadly in this guide and includes community-learning groups such as communities of practice (CoPs) and institutional-based working groups or project groups. In this section, we will consider approaches and frameworks for developing a working group/CoP/learning network. Let’s begin by exploring a the “community of practice” model.

> A community of practice is a group of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly.[1]
>
> Etienne Wenger

There are three characteristics of a community of practice that sets it apart from other communities:

1. **Domain**. CoPs are “defined by a shared domain of interest. Membership therefore implies a commitment to the domain, and therefore a shared competence that distinguishes members from other people.”[2] Establishing a shared domain allows you to
    - identify other practitioners in this domain,

1. Team BE, "What is a community of practice?" Wenger-Trayner, http://wenger-trayner.com/resources/what-is-a-community-of-practice/ (accessed January 28, 2019).
2. Etienne Wenger-Trayner and Beverly Wenger-Trayner, "Introduction to communities of practice," Wenger-Trayner, http://wenger-trayner.com/introduction-to-communities-of-practice/ (accessed January 28, 2019).

    - include the many institutional roles connoted by domain and practice, and
    - discuss and share shared competence involved in open practice.

2. **Community**. “In pursuing their interest in their domain, members engage in joint activities and discussions, help each other, and share information. They build relationships that enable them to learn from each other; they care about their standing with each other.”[3] Establishing a community allows you to

    - create meaningful and purposeful activities and
    - adopt informal or formal leadership that steps up and steps back.

3. **Practice**. “Members of a community of practice are practitioners. They develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems—in short, a shared practice. This takes time and sustained interaction.”[4] As practitioners, you can

    - create purposeful resources and tools together and
    - establish regular meetings for sustaining these interactions.

Design effective communities of practice

Most communities of practice have no formal design and tend to be self-organising systems. They have a natural life cycle and come to an end when they no longer serve the needs of the community. However, there is now a body of theory and research that has identified actions that can help sustain and improve the effectiveness of communities of practice.

Wenger, McDermott, and Snyder have identified seven key design principles for creating effective and self-sustaining communities of practice. These principles are related specifically to the management of the community, but the ultimate success of a community of practice will be determined by the activities of the members of the community themselves.[5] Designers of a community of practice need to:

1. **Design for evolution**. Ensure that the community can evolve and shift in focus to meet the interests of the participants without moving too far from the common domain of interest.
2. **Open a dialogue between inside and outside perspectives**. Encourage the introduction and discussion of new perspectives that come or are brought in from outside the community of practice.
3. **Encourage and accept different levels of participation**. The strength of participation varies from participant to participant. The ‘core’ (most active members) are those who participate regularly. There are others who follow the discussions or activities but do not make active contributions. Then there are those (likely the majority) who are on the periphery of the

3. Wenger-Trayner and Wenger-Trayner, "Introduction to communities of practice."
4. Wenger-Trayner and Wenger-Trayner, "Introduction to communities of practice."
5. Etienne Wenger, Richard Arnold McDermott, and William Snyder, *Cultivating communities of practice: A guide to managing knowledge* (Boston: Harvard Business Press, 2002).

community but may become more active participants if the activities or discussions start to engage them more fully. All these levels of participation need to be accepted and encouraged within the community.

4. **Develop both public and private community spaces**. Communities of practice are strengthened if they encourage individual or group activities that are more personal or private as well as the more public general discussions. For instance, individuals may decide to blog about their activities, or in a larger online community of practice, a small group that live or work close together may also decide to meet informally face-to-face.
5. **Focus on value**. Attempts should be made explicitly to identify, through feedback and discussion, the contributions that the community most values, then focus the discussion and activities around these issues.
6. **Combine familiarity and excitement**. This can be done by focusing on shared concerns and perspectives, but also by introducing radical or challenging perspectives for discussion or action.
7. **Create a rhythm for the community**. There needs to be a regular schedule of activities or focal points that bring participants together on a regular basis within the constraints of participants' time and interests.

Attributions

3.

Develop a Common Vision

> Sharing knowledge is an act of knowing who will use it and for what purpose. This often involves mutually discovering which insights from the past are relevant in the present. To share tacit knowledge is to think together.[1]

Working to developing a common vision for the group can be a prerequisite for the success of the group. One approach to developing this vision is the CARE Framework. The CARE Framework was developed to support open educational resource (OER) stewards on campus. This framework can guide the group as you consider developing a shared vision.

The CARE Framework

The purpose of the CARE Framework is to articulate a set of shared values and a collective vision for the future of education and learning enabled by the widespread adoption and use of OER. It aims to address the question of how an individual, institution, or organization, seeking to be a good steward, can contribute to the growth and sustainability of the OER movement in a way that is consistent with the community's values.

At the centre of the CARE Framework (see Figure 1) are a wide variety of stakeholders—OER creators and users, working as individuals and as part of organizations, in traditional and non-traditional educational settings—seeking to act as good stewards of the values of a sustainable OER movement. Locating people at the centre of the CARE Framework serves to remind us first and foremost of the broader social context and purpose of the OER movement.

1. R. McDermott, "Knowing in community: 10 critical success factors in building communities of practice." *International Association for Human Resource Management* 4, no.1 (2000): 19–26.

Figure 1: The CARE Framework for OER Stewardship.

People serving as OER stewards pursue a wide variety of strategies and tactics relevant to their specific context to improve access to education and opportunity over time. Yet, what all good OER stewards should have in common is a commitment to practices that serve to demonstrate their duty of care to the broader OER movement:

1. **Contribute**. OER stewards actively contribute to efforts, whether financially or via in-kind contributions, to advance the awareness, improvement, and distribution of OER.
2. **Attribute**. OER stewards practise conspicuous attribution, ensuring that all who create or remix OER are properly and clearly credited for their contributions.
3. **Release**. OER stewards ensure OER can be released and used beyond the course and platform in which it was created or delivered.
4. **Empower**. OER stewards are inclusive and strive to meet the diverse needs of all learners, including by supporting the participation of new and non-traditional voices in OER creation and adoption.

Attributions

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4.

Members and Partners

Recruit members

When establishing an open working group, a key point of consideration is who could or should be involved. Depending on your institutional context and the purpose of your open working group, an initial recruitment strategy is to reach out to key stakeholders who might influence or impact decision-making about creating, adapting, or adopting open educational resources (OER) on campus. Key allies and potential stakeholders on campus may include the following:

- Librarians
- Teaching and learning centre staff
- Student society representatives
- Faculty champions
- Bookstore staff
- Technology professionals
- Administrators

Key Stakeholders and Their Roles in Supporting OER Initiatives

Stakeholder	Key Role(s) in Supporting OER Initiatives
Librarians	• Are knowledgeable about educational materials • Work with faculty and students to find, adopt, and adapt OER • Organize and catalogue OER
Teaching and Learning Centre Staff	• Work with faculty to train on the use of OER • Support course and curriculum design and pedagogy for open teaching assignments • Support faculty who want to incorporate OER within a course
Student Society Representatives	• Advocate as the end user of all educational materials • Inventory OER use on campus • Determine students needs/interest in OER • Connect with other stakeholders on campus
Faculty Champions	• Implement open into their classrooms • Lead by example by having an open practice • Encourage colleagues to participate in open • Conduct research about open • Work with articulation committees to include OER in the curriculum
Bookstore Staff	• Offer print-on-demand services • Stock print copies • Distribute OER
Technology Professionals	• Install and support open technology and websites • Research and integrate open tools and OER within campus systems • Develop open source software

Administrators	• Advocate for, promote, and budget for open initiatives • Align OER with strategic and organizational plans

When establishing a group, roles and responsibilities for members may vary—some may be doers, some may be advocates, and some may provide support. Formal groups working towards accomplishing a specific goal or task may have clearly defined roles and responsibilities for members from the outset. In comparison, more informal groups may initially have more fluid roles and responsibilities as members' time and interest permit.

Partner with other institutions

You may want to consider expanding your open working group to include open working groups from other institutions. These relationships can help foster knowledge transfer and staff exchanges, and you may want to work together to develop workshops for online webinars, build subject-specific OER guides, and write grant applications. British Columbia has a number of examples of cross-institution open partnerships. For Open Access Week 2018, open working groups from several institutions collaborated to plan the Open but not Free: Invisible Labour in Open Scholarship panel. Another example would be the B.C. Open Education Librarians (BCOEL) community of practice.

5.

Goals and Purpose

Set goals and determine purpose

Once members have been recruited, the next step is to determine and articulate a shared purpose for the new working group. A more informal open working group might build consensus around common goals via brainstorming and discussion. In comparison, a more formal open working group might be assigned (or tasked with developing) a terms-of-reference document outlining key goals.

Articulating shared goals from the start helps to establish a framework for planning future working group activities and initiatives. These are also important for evaluating and communicating the impact of the group's work to campus administration in future.

Establish meeting schedules and group communications

In order for a new open working group to run smoothly, establishing logistics and ground rules for meetings and internal group communications is also a recommended strategy. You may wish to consider:

- How often the group will meet,
- How agendas will be set, meetings run, and notes captured and shared,
- How group members will generally communicate internally, and
- How the group will communicate about their work externally.

Discussion prompts

These prompts may help your group discover what their participation in open is and what types of activities they may already be doing in open education:

- What does open education mean to you? Are there activities that fall under open education that are already part of your regular educational practice? What are they and why do you participate in them? What value do they bring to your educational practice?
- What roles do you think digital technologies and the Internet have played in making open education possible? Are there types of open educational activities that are dependent on digital technologies and the Internet?
- Thinking of your own teaching practice, have you ever revised learning content to make it

better suited for your course? Why did you revise it? Did you have to get permission before you revised it?

Attributions

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6.

Informal or Formal?

Informal or formal working groups

There will be different working-group models for different institutions. When deciding what would work best for your institutional context, you may want to consider the following things:

- Should this be a grassroots movement?
- Will this be top-down supported?
- Is open a strategically recognized path at your institution?
- Are there already people working on open education initiatives or with open practices who would be logical parts of an informal working group?
- Are there administrative requirements or rules that you will have to comply with in formulating your working group?

As open working groups emerge in various institutional contexts, questions about their structure and formality invariably arise. Should the group have a formal structure? Should the group function in an ad-hoc manner, similar to a community of practice (CoP)? Obviously, one model does not fit all institutions. Let's explore both models.

Informal working groups

Characteristics: CoP model, builds grassroots support across campus units, membership is flexible and inclusive.

Informal groups tend to grow organically through grassroots movements based on shared beliefs and practices. These types of groups tend to continuously evolve and show high levels of dynamism and are responsive to the needs of the group. Similar to the evolution of CoPs, these types of groups tend to easily build trust among their membership. Group leadership emerges through the work of the group and may not necessarily be identified with a core group of representatives. The membership works collaboratively and cooperatively on tasks to further the interests of the group. Typically, high levels of motivation are the norm in these types of groups.

Due to the informality of the group, there are some disadvantages. A grassroots movement requires

dedicated individuals to ensure the work of the group succeeds. It requires the commitment of individuals to set up meetings and events.

Formal working groups

> Characteristics: Task and goal oriented, membership includes core representatives with defined roles and responsibilities.

Formal working groups tend to self organise around a clear structure and well-defined goals. For example, at the British Columbia Institute of Technology (BCIT), the Library and the Learning and Teaching Centre established the need for an open working group as the institution began to explore the use of open educational resources (OER) and open educational practices (OEP). Following a brief assessment of who was engaged in open practices at BCIT, a formal working group was created. Group membership included anyone who was interested and involved in varying levels of open education, which meant the group was fairly large at approximately twenty members. Due to the size and composition of the group, it was decided that the group should have a formal structure to ensure regular meetings and a clear definition of purpose. Based on this example, a formal open working group may include the following elements:

- A chair who calls the meetings and sets the meeting agenda. The role of the chair is mostly to work with the group to set direction and work with the leadership team at the institution.
- A vice-chair and/or co-chair who fills in for the chair when needed and supports the work of the group.
- A secretary who keeps minutes and assists with the administration details of the work of the group.
- Terms of reference to guide the work of the group.
- A strategic action plan.

Formal groups tend to be task and goal oriented. The group sets their own goals and defines the tasks to accomplish over a determined period of time. Typically, formal groups develop Terms of Reference (ToR) to guide their work. The ToR can be developed collaboratively by the membership or by the core representatives to be sanctioned by the membership. In the case of BCIT, the core representatives developed ToR that were later discussed with the membership and approved.

Formal group structures have a number of advantages:

- They facilitate consistency and continuity in the work of the group.
- There is leadership accountability.
- There is financial accountability, which is important when working groups are responsible for institutionally granted budgets.

- They tend to be more stable.
- The establish roles provide a framework for succession. (Typically, the vice-chair or co-chair will assume the chair position as the chair retires from their duties.)

Formal group structures also pose challenges:

- The formal structure may get in the way of the creativity and flexibility needed to get things done.
- Formal structures make it difficult to be responsive to the needs of the group.
- An individual (or a small group of individuals) may dominate the agenda for the group.
- If volunteers do not step up to serve in the core representative group, it may jeopardize its sustainability.

In Practice

KPU: A changing role for the working group

In the case of Kwantlen Polytechnic University (KPU), what started as an informal open working group shifted to a more formalized one. Initially, a group of interested people gathered regularly to discuss open initiatives in general and to coordinate on-campus events. Over time, the purpose of the group and positions within that group began to shift in nature. BCcampus OER grants were distributed from that body, a formal position emerged within the university structure, and "open" became recognized at an institutional level within the academic plan. Soon, an "Open KPU" office also formed, and it became clear that the group had moved beyond casual conversation! Now the group is working on its own strategic plan, is continuing to administer grants, and acts as a sounding board and support for the Open KPU office.

BCIT: Formal at the top

In the case of BCIT, the open working group has a formal structure "at the top": a chair, a co-chair, and a secretary. While the structure is formal, the group membership remains fairly informal, and anyone who is involved in open can join in. In fact, anybody who is working on an OER grant is added to the group as a member by default. Monthly meeting invitations are sent to the entire membership, and on average the meetings are attended by approximately ten people consistently. The steady presence of the chair, co-chair, and secretary keeps the group acting within its defined scope. The influx of new people at meetings brings about new perspectives and new ideas. So far, this model has worked for BCIT.

UBC: Informal by design

At UBC, the open working group initially started as a way to support individual open projects. In particular, the group came together to develop and instruct an online course on "Teaching in WordPress." As this process continued, the participants began to develop more and more trust and collaborate more effectively, and the

group began to work on more projects, including the open.ubc.ca website. This has branched into working together to support and advocate for open education in general. Although there are regular attendees in the group, the group has decided to focus less on formalizing itself and more on working together to complete projects. This means that the group does not use a terms of reference nor does it create sub-committees. This is instead done ad-hoc with different people joining and leaving depending on their goals and involvement in open education.

SFU: Start up

At Simon Fraser University (SFU), a new open working group has recently been formed by representatives of the Library, Teaching & Learning Centre, and Simon Fraser Student Society (SFSS) to develop awareness and build capacity for OER adoptions by sharing information and coordinating efforts among key campus stakeholders who lead and support open education initiatives on campus. Although this group is currently fairly informal, they opted to draft a brief Terms of Reference document to articulate their general purpose and goals, as well as to establish shared expectations around meeting schedules and group communications.

Emily Carr

Currently, there is not an established open working group at Emily Carr University of Art + Design (ECUAD). Initial discussions have begun between the Teaching + Learning Centre and the University Library to establish an open working group. The Library has created an Open Educational Resource section in the ECU Library Catalogue and has set up Library Guides to support and reference topic-specific areas. The Teaching + Learning Centre has purchased several printed versions of open textbooks from the B.C. Open Textbook Collection and added them to the ECUAD Teaching and Learning Library Series for books on pedagogy, teaching, and learning.

Capilano

Capilano University's (CapU) open working group spun out from their Senate Instructional Technologies Advisory Committee and reports to it. It started fairly informally—without a terms of reference or an agreed-on strategy—with the primary goal of bringing together people interested in advocating for OER at the university. It includes members from the Library, the Centre for Teaching Excellence, faculty, the student union, and the administration.

7.

Create an Inventory of Open

A good place to start as an open working group is to take an inventory of the open educational practices (OEP) at your institution. Engaging in this early on can give you a baseline of both open textbook adoptions and open teaching practices at your institution. This baseline can be used to help you measure the impact of your work advocating for and supporting open practices. It can also be a way for the administration to understand levels of cost savings and start looking at learning impacts. For instructors, creating an inventory is a good way to meet them where they are by sharing and showcasing what they are already doing in the open. Finally, this project can help to locate other individuals, such as early adopters who you may wish to include within the open working group.

A number of institutions and organizations have developed inventories of student cost savings in relation to open educational resources (OER) displacing traditional course textbooks. Determining student savings can engage different stakeholders such as student groups in open education and can help policy makers and institutional leaders understand the value of OER. One example of determining cost savings for students is BCcampus where they use a self-reporting form and a cost calculation to determine students savings from commercial textbook displacement. In 2018, SPARC worked with David Wiley to track student savings in the United States due to OER.[1] This post discusses the methodology that they used and contains links to all of the data.

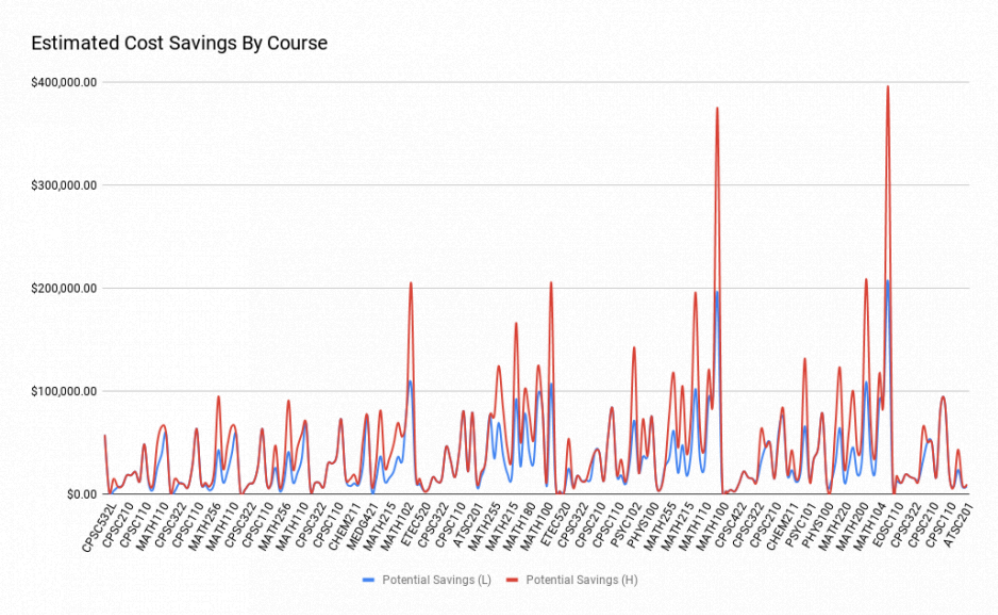

Figure 2: Estimated cost savings by course, 2018 UBC. [Image Description]

1. Mo Nyamweya, "A New Method for Estimating OER Savings," SPARC, https://sparcopen.org/news/2018/estimating-oer-student-savings/ (accessed January 31, 2019).

Approaches to creating an inventory

An inventory may require a lot of conversations and investigative work. Often, the more successful inventories require engaging staff and faculty at a one-on-one level in order to find out what OER work is being done. If you are looking to create an inventory of open at your institution, you can take the following actions:

- Answer 20 Questions to Ask about Open Education [PDF] and [fillable PDF]. These 20 yes or no questions cover institutional values, knowledge, support, action, and policy and will give the advocates in your institution an indication of where there might be some gaps. To address those gaps, see this searchable database of corresponding open education strategies.
- Survey faculty to determine how they are using OER. (See this 2016 survey of faculty using OER [PDF].)
- Contact OpenStax, BCcampus Open Education, and other open textbook providers to obtain a list of faculty adoptions from your institution.
- Create and distribute a survey, and have instructors report their adoptions.
- Work with the library and the teaching and learning centre to get information about what resources are being included in different courses.

In Practice: Creating an Inventory at UBC

At the University of British Columbia (UBC), the Centre for Teaching, Learning and Technology and the open working group approached the evaluation of OER and OEP initially by trying to get a picture of some of the open practices that instructors were using at UBC. This approach helped to get a baseline of the adoption, adaption, and creation of OER within the institution and made it possible to share examples within UBC and with the larger community.

Developing an inventory for a large and sometimes decentralized research university required using a number of different strategies and approaches:

- They sent out surveys to certain faculties to locate examples of adoption, creation, and adaptation.
- The Faculty Liaisons, a group of staff who work at both the Centre for Teaching, Learning and Technology and individual faculty units, worked with faculty teaching-and-learning units to find examples of OEP.
- They contacted BCcampus and OpenStax to obtain lists of current open textbook adoptions at UBC.
- Based on the activities above, they followed up with individual faculty members and departments to determine specific adoption details.

These time-intensive activities were undertaken primarily by the Open Initiatives Strategist in collaboration with the open working group. The final result was an ongoing series of UBC Open Snapshots that captured the current state of open at the university. In addition, the process revealed potential UBC-student savings between $1.7 and $2.9 million between 2011 and 2016.

Image descriptions

Figure 2 image description: A graph showing high and low cost-savings estimates for fifty UBC courses in 2018. For most courses, savings estimates were under $100,000 per course. Fifteen courses had savings that ranged between $100,000 and $200,000 on the high end. The two courses with the highest estimated potential savings saved students over $350,000 each. [Return to Figure 2]

Media Attributions

- Estimated Cost Savings By Course © Will Engle is licensed under a CC BY (Attribution) license

8.

Identify Funding, Resources, and Support

A key approach to driving adoptions of open educational resources (OER) is to find ways of providing funding to instructors adopting or adapting open textbooks or resources. An open working group may want to look at distributing internal grants to support instructors in the development of open resources. In addition, the open working group may want to take an inventory of grants available from external organizations, such as BCcampus, Creative Commons, or the Mozilla Foundation. You can also find ways of combining these sources; for example, you can match organizational funds with institutional grants.

External grants

In the very early days of OER, a handful of foundations such as the William and Flora Hewlett Foundation led the way in funding OER projects across the globe. Today, funding for OER remains limited, although more diversified. Individuals and colleges may explore a range of sources to support their OER work, including those listed below:

- **International funds**. For example, the Shuttleworth Foundation Fellowship Program provides funding for individuals working on OER and open initiatives globally.
- **Provincial funds**. Check out, for example, call for proposals to develop or adapt OER that are periodically posted on the BCcampus website.

Institutional grants

Some institutions may have already launched an OER-grants program. If this is the case, the open working group may wish to reach out to the grant-program administrators to coordinate messaging and open education-related programming when possible.

If your institution does not have any OER-dedicated grants, you should see if there are existing grants and funds that could be applied to OER work:

- Ask your institution about existing research grants and whether the development of OER may be funded as part of those research grants.
- Check with your institution to see if funds, refreshments, or time off are offered for OER projects and events, such as sprints to create new OER.

Develop an institutional grant program

If there are no existing grants that can be applied to the creation or adaptation of open resources, you may wish to lead the development of institutional grants program for OER.

In Practice: Working Groups Supporting Open Education Grants

Including open in existing innovation grants at UBC

The University of British Columbia (UBC) has a Teaching and Learning Enhancement Fund (TLEF) that was created in 1991 to enrich student learning by supporting innovative and effective educational enhancements. Starting in the 2017/2018 cycle, a priority focus on the development or integration of OER was added to the TLEF criteria for new proposals. Furthermore, eligibility requirements were also added that specifically state that funded projects are encouraged to openly license their developed materials under an appropriate Creative Commons licence to allow for broad sharing within and beyond UBC.

Applying for and supporting external grants at JIBC

At the Justice Institute of British Columbia (JIBC), staff and faculty are encouraged to apply for external grants for funding for OER, where applicable. JIBC has received a number of grants/funding for OER, including the 2017 Zed Cred grant from BCcampus. The Centre for Teaching, Learning and Innovation (CTLI) offers guidance and support for staff and faculty submitting OER-grant applications and may also offer funding for OER creation or adaptation projects. The CTLI is particularly interested in funding and having students get involved in OER projects.

Setting up internal OER faculty grants at TRU

Thompson Rivers University (TRU) offers yearly Strategic Investments Fund (SIF) grants for special projects. After the TRU Student Union's (TRUSU) 2016 Open Textbook campaign to push for support for faculty to create OER, a small, informal group put together a joint proposal to create faculty grants. Members from TRUSU, the Faculty of Arts, the Library, Open Learning, and the Centre for Excellence in Teaching and Learning partnered to fund up to eight faculty grants of $5000 each (based on SFU's similar program) and were successful in their request.

SFU OER grants

Since 2016, the Simon Fraser University (SFU) Open Educational Resources Grants program has provided funding and in-kind support to over fifteen projects that have saved students significant money on textbook costs and supported innovative teaching practices. This program has been jointly administered and supported by the Library and Teaching & Learning Centre (TLC). The new SFU OER working group plans to coordinate with the already established grants program to raise awareness about funding opportunities available to instructors via this program and to organize events highlighting and celebrating achievements of SFU OER grant recipients

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- "Including open in existing innovation grants at UBC" from "Open UBC Snapshot: Open as a TLEF Priority Focus" by Will Engle. © CC BY (Attribution)

9.

Conclusion

Now that you have completed this section, go through the checklist below to guide you through the process of establishing a new open working group or use it to revisit how your current open working group is set up.

Checklist: Establish an Open Working Group

- Establish a framework/approach for your open working group.
- Consider the fit for your institution. What sort of group can be the most effective? Formal or informal?
- Determine who are the open advocates or supporters at your institution and ways of engaging them in the open working group.
- List the relevant stakeholders and how you will engage them.
- Establish the open working group's goals and purpose.
- Find ways that open education links with your institution's strategic plan or vision.
- Identify potential funding options for open education at your institution.
- Find resources and support for open education.

II

Run a Working Group

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10.

Introduction

Learning Objectives

This section will help you:

- Determine collaboration points and opportunities.
- Identify roles at your institution that can help support open education.
- Explore processes and aspects of the working group that can be open.
- Identify examples of workshops and events that showcase and support open education.
- Create an inventory of open resources at your institution.

11.

Key Considerations

Regardless of where your open working group may fall on the spectrum of formal to informal, there are certain things to consider doing and places you can look for support.

Keep a record

Kick off your committee by establishing a shared digital place where agendas, minutes, best practices, and other documents can reside. Avoid documents becoming orphaned in individual emails.

Inventory the different ways to communicate with your community at your institution and establish when, how, and what you will communicate out from your group. One approach that has been taken by a number of open working groups is to consider an open way to document and keep a record. At the University of British Columbia, the UBC Wiki (MediaWiki) is used for sharing all agendas, activities, and members in the open. You may want to look at the Open Ed Tech Collaborative apps available via Sandstorm for collaborative editing tools that will allow you to share and edit documents.

Find administrative support

Booking meetings, finding rooms, sending out agendas, and other administrative tasks can make or break a group's functionality if not done. Is there a dean or administrator on your committee that is able to offer administrative support? Who is writing announcements? Where are you sending them? Who has booked the room, ordered the coffee?

Set up communication and marketing

It never hurts to look good! Are there channels at your institution that will offer you marketing and promotional advice? Are there logos and creative designs already available in the open marketplace that can help you with banners and graphics? Are there institutions that can share open marketing ideas? Think about a digital or web presence as early as you can.

> Check the Open Education Week website or the Open Access Week Graphics for promotional materials.

Provide professional development for members

Depending on the composition and background of your open working group members, different professional development opportunities will be useful for sustaining the group. Think about training on the different technologies offered to sustain open at your institution. Look at conferences related to open subjects, such as the Open Textbook Summit. Other professional development opportunities may include inter-institutional events, development sprints, and workshops (such as on copyright, Creative Commons licences, and open pedagogy).

12.

Engage Different Stakeholders

What roles at an institution have a role in open? There are many! By expanding your open working group membership in different areas, you can bring new perspectives into the discussion around open education and create and sustain new partnerships.

Do you have membership in your group to get the best uptake for open at your institution? Who should you partner or collaborate with to increase support for and interest in open? Keep the conversations going by identifying and raising open as part of institutional/departmental conversations (e.g., new technology assessments, copyright strategies, teaching and learning support).

- **Faculties**. Depending on the size of your institution, different faculties or faculty units may be key drivers and supporters of open educational resources (OER) and open educational practices (OEP). This also can open up questions of what does open education look like and how is it used in different disciplinary contexts. The use of OER is approached very differently in different faculties.
- **Curriculum committees**.
- **Articulation committees**.
- **BCcampus**.
- **Textbook committees**.
- **Student unions or groups**. Advocate for and develop awareness among students, and support students in their own advocacy efforts. You can assist students in applying for OER grants, work with students around #textbookbroke campaigns, support students in conducting environmental scans, and more.
- **Program council**.
- **Cross-institutional committees**.
- **Bookstore**.
- **Library**. As described in more detail below, the library is typically a key stakeholder in advocating for and supporting open.
- **Teaching and learning centres**. Determine how a teaching and learning centre already engages with OER. Connect OEP with OER and open education in general.
- **Administration**. Share and connect with these groups about how OER adoption relates to student retention and cost savings. The college or university administration can be a key partner in advocating for and supporting open. In institutions such as UBC and KPU, the administrations have made significant commitments to OER and OEP in a number of ways, including adding goals and visions around OER within their strategic plans.

- **Accessibility office**. One goal of open education programs and movements is to make education more accessible. Partnering with your institution's accessibility office can help ensure that the resources that you create and share are accessible to each and every student. The BCcampus Open Education *Accessibility Toolkit* provides resources to make truly accessible OER.

Questions to Consider

Reflect on the different roles at your institution:

1. Who is already engaged in an aspect of open practice?
2. What people and roles at your institution should be included in your open working group?

Partnering with your library

Your library is an excellent resource for open-related activities. Reach out to your librarians to learn how they can partner with your open working group. There is a B.C. Open Education Librarians group that is also actively engaged in open activities. The library may be able to offer the following support for open:

- Assist faculty in finding OER by
  - offering workshops,
  - consulting with faculty,
  - creating guides to find OER repositories and resources (e.g., library guides), and
  - including open textbooks in the course catalogues.
- Assist faculty in creating and adapting OER by supporting instructors working in Pressbooks. For example,
  - KPU librarians support faculty in publishing open textbooks. Librarians are increasingly working with faculty to help them design and develop their textbooks in Pressbooks and to use the platform successfully, and
  - at the University of Victoria, the library has partnered directly with faculty on OER grants and worked with them to publish open textbooks, such as *Knowing Home: Braiding Indigenous Science with Western Science*.
- Assist faculty in integrating OER and no-cost resources in their teaching by
  - helping faculty link to open and non-open works within their course sites,
  - using existing pathways to ship textbooks using interlibrary loans,
  - working with the bookstore to provide on-demand printing of open textbooks, and
  - purchasing print copies of open textbooks for course reserve.

- Align library priorities with the larger institutional priorities on open (will depend on the institution) by
    - rebranding existing library programs with “open” in mind and
    - streamlining support needs and offerings (e.g., library staff support).

13.

Start Big and Start Small

The main purpose of the open working group is to introduce, establish, and provide support for open education at your institution. There are many different ways to accomplish this. Depending on the goals of the open working group, the group may focus on the development or informing of institutional policy related to open education. For other open working groups, there can be more of a grassroots focus in supporting individual instructors finding, adapting, and reusing open educational resources (OER) and teaching in the open. Open working groups often work simultaneously on both of these goals. In this section, we will share some approaches and tools for both of these approaches.

Start big! Consider open policies at the institutional level

When thinking about implementing open policies on an institutional level, there are a few questions you need to consider. Who can advocate for this? Whose support will you need? Who can help develop this?

Open working groups can have a significant impact on policy-level decisions. This can range from informing and advocating for policy changes on open to developing open policies for an institution. According to the OER Policy Development Tool, the broad steps in developing an institutional policy include seven components.

OER Policy Development Tool

The OER Policy Development Tool can guide you in developing each of these components. You can use the tool to develop policy or inform policy developed by other administrative, faculty, or student units.

1. **OER purpose statement**. The college or university community needs to know why OER is important and how it aligns with the college or university vision and mission. An OER policy begins with a clearly stated and shared purpose.
2. **OER policy statement**. An OER policy stipulates compliance with local, national, and international laws, regulations, and standards. To improve the chances of a successful college or university OER program initiative, it is essential that teaching faculty especially be engaged in writing the policy, beginning with the purpose.
3. **Licensing OER**. Requirements for works created during the course of employment, including how they may be shared and used by others, needs to be clearly understood. Typically this is addressed in a college or university intellectual property (IP) and copyright policy. OER may be addressed in an existing IP policy or addressed separately in an OER policy. In either case, the use and creation of OER does not supplant an institution's IP policy; it supplements the IP policy. We recommend, as a best practice, setting the default the

most open and least restrictive Creative Commons Attribution Licence (CC BY) whenever possible.

4. **OER procedures and responsibilities**. An OER policy makes clear who is responsible for what in developing and sustaining OER programs, including, for example, instructional aspects, training and professional development, student and cross-functional support, and leadership and governance.
5. **OER training and professional development**. Training for faculty and staff is essential to introducing and sustaining an OER program. OER basics include such topics as locating OER; understanding intellectual property, copyright, and open licenses; adopting and adapting OER; and creating and sharing OER. Engaging with colleagues in the open community provides faculty and staff professional development opportunities, venues to exchange ideas and deepen their understanding and commitment to OER, and opportunities to build new networks.
6. **OER technical format**. The technical format of OER creation and usage is an important consideration for OER policy. The OER created and/or used by faculty or staff should be in a technical format that allows for the greatest flexibility for retaining, reusing, revising, remixing, or redistributing content.
7. **OER quality assurance**. The quality of the OER chosen by faculty as subject-matter experts to use in the courses and programs they teach needs to be of equal or greater quality than commercially distributed publisher content.

The focus of the OER Policy Development Tool is on OER; depending on the goals of the group, you may want to broaden your focus to consider including open education, open access, and open science in your policy development. In tandem with considering open policies at your institution, you may also want to consider opening up your own practices.

Questions to Consider

1. What are the current policies at your institution that support and inform OER and open pedagogy?
2. What role does the open working group currently have in informing and developing OER policies?

Start small! Open your own practices

> Be open and inclusive. Add value. Make visible what you are using from the commons, what you are adding, and what you are monetizing. Maximize abundance. Give attribution. Express gratitude. Develop trust; don't exploit. Build relationship and community.
>
> Stacey and Hinclife Pearson (2017)

One approach a number of open working groups have used as a way to raise interest in open practices is to focus on opening up their own practices and resources. By opening up your own resources and practices, it can model the value of open practices, and it can also be used as a way to start a conversation

about open practices. It is also a way to connect with other open working groups and enable people to build on and improve these resources. This process does not need to only involve licensing but also developing resources that are findable and accessible. Here are examples of things that you can open up:

- Slides and lesson plans from professional development programs
- Toolkits and documentation supporting open
- Videos that showcase open at your institution
- Survey tools
- Meeting agendas, minutes, and terms of reference

This approach can start with the products and processes from the open working group and can be extended to the areas that you work in. What would it mean for a teaching and learning centre to openly license its resources?

In Practice: The UBC Open Working Group

The University of British Columbia (UBC) open working group began at the outset making all of its resources and processes open. This was an intentional decision, with the goal of making the resources and processes visible in order to disseminate them more effectively and to promote and support open through "walking the walk" with open practices. This approach has helped the development of the group and has served as a professional development opportunity for members of the group who needed to learn about open licensing, open sharing, and how to develop usable resources from the outside. The open pack has decided to share all elements of their practice, including presentations, meeting notes, agendas, memberships lists, work plans, and shared resources. To effectively do this in the open, they have developed an Open UBC Working Group portal where they share and/or link to products and processes created and used by the group.

Attributions

14.

Provide Grants and Support

Identify existing institutional and organizational support

Teaching and learning centres and libraries often have the knowledge and capacity to support aspects of open educational practices (OEP) and open educational resource (OER) development. For example, the libraries at institutions such as SFU, KPU, and UBC support faculty adopting, adapting, and creating OER. However, open education is an emerging discipline and adequate support for open education is sometimes lacking.[1] This lack of support can mean that faculty take on open projects off the sides of their desks, increasing workload and stress and increasing the potential for redlining:

> For if the movement relies on voluntary academic labour or severely under-compensated academic labour to create, peer-review, and contextualize OER, we are in effect perpetrating an implicit form of redlining, one that reserves the capacity to create or adapt OER for those who already enjoy positions of privilege, such as the tenured or those who do not need the income.[2]
>
> Rajiv Jhangiani

Working groups can play a role in mitigating the issue of voluntary academic labour by supporting faculty by helping them identify available institutional or organizational support.

Questions to Consider

1. What institutional resources are available to faculty, staff, and students?
2. What resources from outside of the institution can be leveraged?
3. Which units within your institution have the expertise to support faculty in the design and development of OER?
4. Which units within your institution can support open pedagogy and OEP?
5. What platforms or tools are available to create OER or support open practices? Examples, of this might include Pressbooks for textbook publishing or Media Wiki for open teaching.
6. Which units or individuals are available to provide training and support for open tools?

1. Martin Weller, "Different Aspects of the Emerging OER Discipline," *Revista Educacao e Cultura Contemporanea* 13, no.31 (2016).
2. Rajiv Jhangiani, "OER, Equity, and Implicit Creative Redlining," Rajiv Jhangiani, PH.D., http://thatpsychprof.com/oer-equity-and-implicit-creative-redlining/ (accessed January 31, 2019).

Support faculty who use OER or OEP in their courses

In addition to helping faculty identify existing supports, open working groups have developed processes and services for faculty who use OER and OEP. Open working groups can also provide support for projects focused on creating or adapting OER. In B.C., this support ranges from distributing grant funds and managing these projects, to working directly with faculty members to develop and adapt OER, to providing technical support and consultation for faculty developing these projects.

In Practice: Supporting the Creation of OER

At the University of Brtish Columbia (UBC), members of the open working group have provided individual consultations for faculty using open approaches to teaching. At Kwantlen Polytechnic University (KPU), the open working group, in collaboration with the library, has developed OPuS, KPU's Open Publishing Suite, which includes support for creating, adopting, and adapting OER with Pressbooks.

Offer open development grants for faculty

A number of open working groups are involved in the administration and support of open development grants. These grant funds are offered by the institution, awarded by the committee based on established criteria, and provided to the faculty member for the development of an OER or open course. These criteria may be based on what subjects are in need of OER or by some other criteria deemed important by your group. Examples of these grant programs can be found at KPU, BCIT, and TRU.

Offer open incentive grants for faculty

For an alternative approach to development grants, Douglas College encourages individuals or teams to apply for incentive grants towards a professional development activity of their choosing to assist in the implementation of OER in courses. The purpose of the incentive is to encourage faculty to explore and implement ways to reduce the cost of education to students while maximizing access to and use of textbooks and other learning resources by all students.

15.

Events and Initiatives

Chapter navigation

Workshops and events can increase awareness and support for open education and open educational resources (OER) within your institution. Faculty and staff gain valuable skills and approaches for developing open resources. At institutions in British Columbia, like Douglas College, BCIT, and UBC, open working groups have developed and delivered a range of events from showcases to open courses to skills-based workshops. In the following section, we will look at some of the approaches taken to these workshops and events and what has been most successful.

Questions to Consider

1. What events does your institution or organization already have that support open?
2. Are there institutes or pre-existing programs where there is an opportunity to host an OER or open workshop or event?
3. What are aspects of open that you can use to showcase open practices at your institution? Are there people in open education whose work you can share?

Open education workshops

One approach to both supporting and raising awareness for open education is to host workshops focused on some of the knowledge and skills required to adopt, adapt, and create open resources, and implement

open pedagogy and open practices. These workshops can focus on licensing, tool use, finding and using OER, or developing OER using an open resource creation tool such as Pressbooks. By focusing on tangible skills, these workshops can offer a valuable entry point for people just getting started in open and fill skill gaps for those more familiar with open practices. These workshops can also create opportunities to collaborate between different units such as the library, teaching and learning centres, and faculty centres. You can find information about developing and running many of these workshops online. In the following section, we have listed some common skills-based workshops and included where you can find open resources to run them with.

Workshop examples

Finding, using, and remixing OER resources

One approach to engaging instructors, staff, faculty, and students around open education and OER is to run a workshop focusing on finding, using, and remixing OER. This type of workshop is useful for people starting to consider adopting OER because it provides participants with an answer to a common challenge in education: how to find resources to use in their presentations and courses. See In Practice: Find, Use, and Remix OER for Your Courses in this chapter for a description of a workshop like this.

Pressbooks workshops

Pressbooks is an open-source software that enables book creators to design and produce an open textbook or resource for the web and export it into multiple file formats like PDF, EPUB, MOBI, and various editable formats. BCcampus hosts its own instance of Pressbooks and all faculty, instructors, and staff working for post-secondary institutions in B.C. can use this service by registering for an account. Workshops about Pressbooks are a way to help provide faculty with a key tool in OER creation. Pressbooks workshops can focus on creating an actual resource, reusing a book published in Pressbook, or the process of adapting a textbook. BCcampus has a number of openly licensed resources that you can use and adapt when offering these workshops:

- Pressbooks Webinar Recordings
- Pressbooks Training PowerPoint Slides
- Pressbooks Video Tutorial Series

There are lots of other examples of types of workshops that you can run for instructors, faculty, and staff, including

- How to create open resources,
- Intro to Creative Commons licensing,
- Intro to open pedagogy,
- How to develop ancillary resources,
- Workshops highlighting open tools such as blogs and wikis, and
- Workshops about how to use the LMS to create and share OER.

Workshop resources

Inspire your workshop participants by showing examples of what high-quality OER looks like:

- **Showcase open textbooks**. Find great exemplars from the B.C. Open Textbook Collection, a curated collection of open textbooks, many of which have been reviewed and vetted by educators across Canada.
- **Showcase open course materials**. Share resources from the Open Course Library's collection of course materials, including syllabi, course activities, readings, and assessments designed by teams of college faculty, instructional designers, librarians, and other experts.
- **Showcase open media**. Explore Getty Institute Open Images, a searchable database of open images, or the Creative Commons image search tool.
- **Showcase open data**. Showcase data from the UBC Open Data Collection, a repository with a collection of Canadian geospatial datasets.

Open courses

In addition to running workshops on skills and approaches required for open practice, another approach is to engage faculty, staff, and students to complete an open course, either together or individually. Consider sponsoring participants to complete these programs as a cohort and organize brown-bag lunches and meetups to share their learning and experiences.

Examples of open online courses

Creative Commons Certificate

Creative Commons offers a Creative Commons Certificate program, which is "an in-depth course about CC licenses, open practices and the ethos of the Commons. The course is composed of readings, quizzes, discussions and practical exercises to develop learners' open skills." You can organize a cohort of faculty to take this program together, complete the train-the-trainer program to offer it within your institution, or incorporate the program within your own offerings.

Open for Learning Challenges (UBC)

The Open for Learning Challenges website includes "challenges" that can be completed by instructors, staff, and students independently or can be used to create interactive activities as part of a workshop. The challenge bank structure is based on the architecture developed by Alan Levine for DS106 and Agora, and it includes challenges about open resources, open teaching, open profiles, and open advocacy.

Sprints

Sprints are probably most associated with software design but are becoming increasingly used as a strategy or approach for developing OER. The sprint approach can be used in a variety of contexts where a group of people (often cross-disciplinary) come together to focus on a specific project. In post-secondary education, sprints are emerging as a way to accomplish a shared goal while working across disciplines and on a short timeline. Hackathons can follow a similar process but often have a competitive element. In open education, sprints can be used as a way to quickly develop open textbooks (e.g., this Geography open textbook sprint) and ancillary resources (e.g., a sprint to develop a psychology test bank).

Figure 3: A sprint process. [Image Description]

The sprint methodology includes the following features:

- Short timelines and achievable goals,
- Time-boxed working sessions (usually two to three days but can vary according to context and needs),
- A defined outcome (i.e., textbook, resource),
- A planning session to develop the sprint process,
- Multiple perspectives and skill sets,
- Identified/agreed roles for participants, and
- Collaborative rather than competitive development processes.

Appendix 1: A Sprint Toolkit will guide you through all aspects of setting up and running a sprint at your institution.

Celebrate/showcase open education

Sharing and showcasing open education projects is a successful approach used by open working groups and institutions. A number of open working groups host events to share and celebrate open education within their institutions.

Provincial and national events

One strategy used when developing events is to host local events as part of provincial and national events and/or support faculty to attend these events.

Open Access Week

Open Access Week is organized annually by SPARC in late October. It is a global event that brings together the academic and research community to share and learn about approaches to and benefits of open access. Each year, the BCOEL has organized events as part of Open Access Week. Past events have focused on scholarly publishing and tension in open scholarship.

Open Education Week

Open Education Week occurs around the first week of March. B.C. post-secondary institutions are active in hosting open education events. Past events have included one-day conferences, lunchtime presentations, hackathons, and evening socials with a panel.

Open Textbook Summit

Open Textbook Summit is a conference hosted every two years in Vancouver, B.C. in April/May that brings together people working in open. This event is for new and experienced OER advocates as it offers the opportunity to learn and share effective practices in awareness building, implementation, collaboration, strategy, and research in open education.[1]

In Practice: Find, Use, and Remix OER for Your Courses

A great starting place for these workshops is finding and using Creative Commons licensed resources within the classroom. For many instructors, this is an open practice that they are already engaged or interested in. This can be done through locally lead workshops. At the University of British Columbia (UBC), the open working group leads these workshops a couple of times a year in collaboration with the Centre for Teaching, Learning and Technology and the UBC Library. The workshops are developed and led by academic staff, instructors, and librarians to provide a balance of different perspectives and share expertise in different areas. Below is a sample description of these workshops.

Finding, Using, and Remixing Open Resources For Your Courses – Sample workshop description

As you prepare for your courses, chances are you may want to incorporate educational resources such as images, videos, or quiz questions from different sources into your own materials. There are millions of openly licensed resources—from full courses and textbooks to tests banks and images—that are available for others to freely use. These resources can be modified and adapted to be more useful for your own teaching or

1. Note: In 2019, this event will be the Cascadia Open Education Summit.

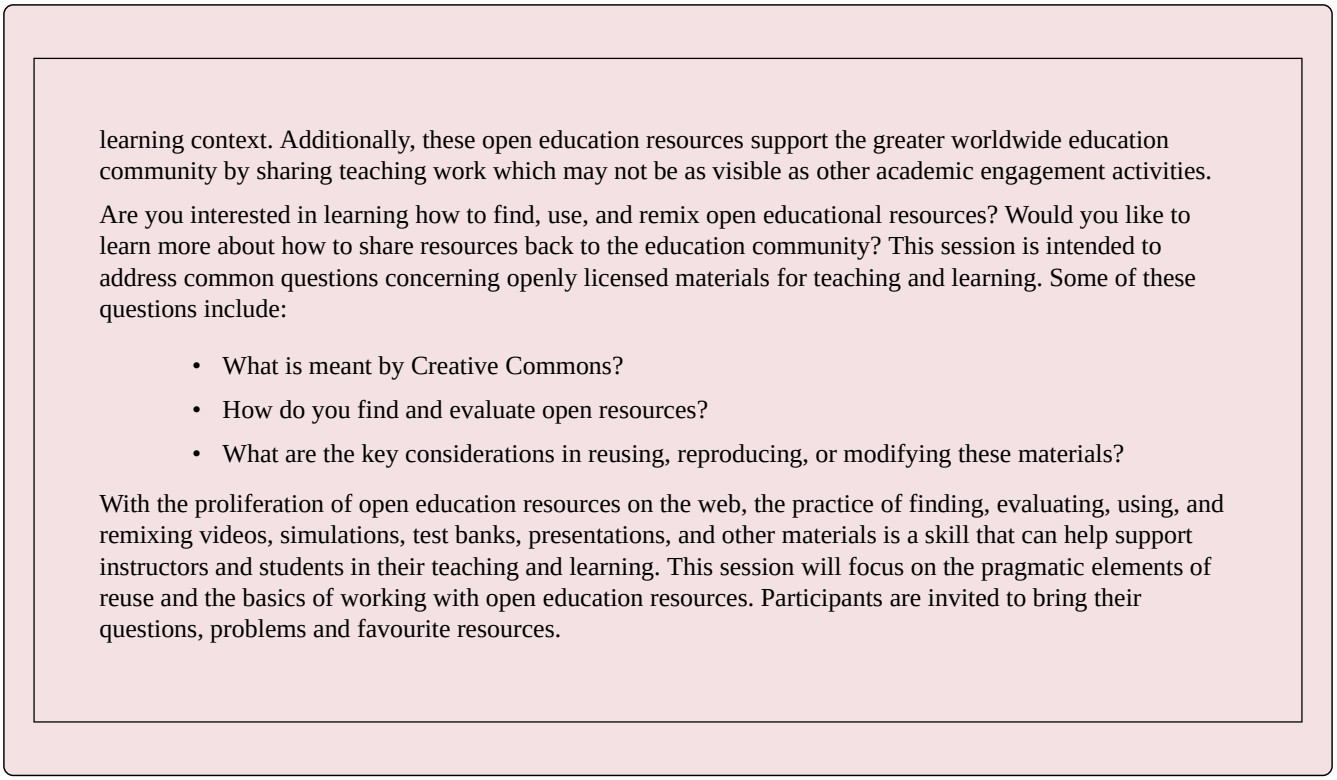

Image Descriptions

Figure 3 long description: A Sprint Process.

- Step 1: Plan. The sprint team determines the goals of the sprint, the sprint team, the logistics, and the venue.
- Step 2: Prepare. The team explores the sprint content, process, technology, and collections open resources.
- Step 3: Set up. The team sets up the venue and creates necessary style guides and templates.
- Step 4: Deliver. The sprint facilitator leads the intensive sprint, emphasizing intensive content creation and collaboration.
- Step 5: Debrief. The sprint team captures resources created and plans for the publication process.

[Return to Figure 3]

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- A Sprint Process © Lucas Wright is licensed under a CC BY (Attribution) license

16.

Creating Resources

Working together to develop resources can help bring open working groups together and provides a way to share resources and showcase open practice at an interaction. For some working groups, the shared work of developing an open resource can provide a sense of purpose and increase connection.

Types of resources

There are a number of different resources that open working groups have collaboratively developed. These range from extensive resources such as websites supporting open to brief guides about different elements of open practice.

Open web spaces/portals

Institutions such as the University of British Columbia (UBC) and the British Columbia Institute of Technology (BCIT) have developed websites to showcase and support open at their institutions. These sites often highlight examples of open practice at the institution. These examples are explored using interviews, videos, and databases of examples from practice. On the UBC Open site, the group has a growing inventory of open practices ranging from examples of open textbooks to students participating in open projects to open data and science examples. There is also a form so that instructors can submit an open resource or example of an open practice. The BCIT open site has an inventory of open textbooks that have been created or adapted at BCIT. Open sites also might include information about aspects of open practices, including creation, licensing and adapting open resources. They can also be a space to share upcoming events and workshops.

In Practice: Open Education Sites in B.C.

Here are examples of B.C. open education sites that showcase and support open education:

- BCIT Open Website. This website includes an inventory of open textbooks used and adapted at BCIT, a collection of open related resources, a description of the open working group, and open education grants.
- KPU Open Website. This is a web page that has been created on the main KPU site. It includes

information about open education, programs at KPU, and available grants.

- UBC Open Website. This is a comprehensive website that includes an inventory of open education examples; an overview of open practices, open resources, and open pedagogy; a listing of open education-related events; and regular news updates.

Open reports

As we discussed in the previous chapter of the guide, creating inventories of open practices is a good way for open working groups to support and advocate for open. A couple of open working groups have collaborated to produce annual or monthly reports about open practices at their institutions. The BCIT Open Working Group published the Open Education Report, 2018, which discusses grants that have been awarded and events. The Open Pack at UBC develops Open Snapshots each term that report on open activity. Completing reports can be a way of sharing and celebrating open work at an institution and provide the open working group with a sense of purpose and direction in collaboratively developing them.

How to create open resources

When you are ready to create open resources for your institution, you will want to review existing open resources to adapt and use open processes in your creation.

Adapt existing open resources

A great aspect of open education is that there are lots of open resources that you can adapt and reuse, so you do not want to reinvent the wheel. Instead, you should look into adapting open resources from other working groups, institutions, and organizations. Here are some places to start looking:

- Creative Commons search. Search Creative Commons licensed media, images, and audio.
- The Support Resources category of the B.C. Open Textbook Collection. A collection of support resources with information about open education, institutional policy, and adopting, adapting, and creating OER.
- B.C. Open Education Library Guides. A collection of openly licensed guides created by the BCOEL.
- Open UBC. UBC's open site that includes resources about all aspects of open education. All of the resources are openly licensed.

Use open processes

As you adapt or create these resources within the open working group, it is worth considering open processes and open approaches to resources creation. Doing this can provide the members of the

group with the opportunity to become more familiar with both open tools and aspects of creating open resources like licensing and creating accessible content. There are a number of ways that you can incorporate open processes into your resource development process:

- Use open tools for resources development. Examples include MediaWiki, WordPress, or Pressbooks for resource creation and Etherpad or Mattermost for collaboration. Many institutions have access to these tools. You may also want to check out the OpenETC group.
- License and share resources that you develop using Creative Commons licences.

Questions to Consider

Take stock of resources focused on open education at your institution:

1. Are there resources dedicated to open education?
2. What resources can your group adapt or develop?
3. How will the resources that you create be designed, developed, and maintained?

17.

Conclusion

After considering aspects of running an open working group, go through the checklist below to think about some ways that your open working group can support and advocate for open education in your institution.

Checklist: Running an Open Working Group

- Create a list of stakeholders that you can engage with on open education at your institution.
- List specific ways that policies at your institution support or don't support open education. Consider some of the following documents:
    - the strategic plan and vision
    - tenure promotion documents
    - collective agreements
- Develop a plan for openly licensing and sharing the resources that you create within the open working group. How will you license, share, and make these resources accessible?
- Work together to design an open education workshop.
- List individuals and roles that you would like to celebrate and highlight at your institution.
- Make a list of resources that your institution currently has that support open education. Then go through the examples of open resources at different institutions. Look for gaps. What resources can your group develop or adapt to support open at your institution?

III

Sustain a Working Group

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18.

Introduction

Learning Objectives

This section will help you:

- Build strategies for developing a sustainable open working group.
- Identify ways of evaluating and communicating open working group activities.
- Assess tools and frameworks for evaluating open educational practices.

19.

Sustain

> Sustainability in relation to OER is closely linked to the business model or approach that an individual, group or institution adopts to release, manage and support OER. It is not just about sustaining existing OER but about embedding processes and transforming practices to support ongoing OER production and release.[1]

The sustainability of your open working group is very much related to the sustainability of open education and the open educational resources (OER) that are used, created, and adapted at your institution. Sustaining OER is often done at the open working group level, and the practice of sustaining OER can strengthen the open working group. Koohang and Harman argue that because communities of practice (CoPs) are "characteristically decentralized," they can improve the scalability of open projects.[2] This is because the decentralized nature of CoPs allows for "members [with] different skills and experiences" to work together towards the "common goal" of sustaining OER.[3] Schaffert and Geser also note that the "collaborative creation and sharing" of OER is important to its sustainability.[4] In many ways, an open working group plays an important role in ensuring the sustainability of open education at your institution.

Many of the supports and strategies outlined in previous chapters will help sustain open education and open working groups at your institution, including providing professional development to improve institutional capacity, sharing information about OER adoption, using open approaches to teaching, and providing grants.

1. Lou McGill, "Open Educational Resources: Sustainability," Jisc, https://www.jisc.ac.uk/guides/open-educational-resources/sustainability (accessed January 25, 2019).
2. Alex Koohang and Keith Harman, "Advancing sustainability of open educational resources," *Issues in Informing Science & Information Technology* 4 (2007): 540.
3. Koohang and Harman, "Advancing sustainability of open educational resources," 541.
4. Sandra Schaffert and Guntram Geser, "Open educational resources and practices," *eLearning Papers* 7 (2008).

20.

Evaluate

> Evaluation is the collection of, analysis and interpretation of information about any aspect of a programme of education or training as part of a recognized process of judging its effectiveness, its efficiency and any other outcomes it may have.[1]
>
> Mary Thorpe

How are evaluation and sustainability related?

Evaluating whether your open working group has met its goals and stated outcomes is an essential part of ensuring its sustainability. (See Goals and Purpose.) Communicating to stakeholders—including senior administration and student groups—about success and impacts of activities such as events, grants, or program/policy changes may lead to increased support and further initiatives. However, evaluating the impact of OER adoption and advocacy can be challenging, so it will be important to consider the type of tools to use and evidence to gather early when establishing your open working group:

> …evidence generated by complex and innovative processes such as OER release is often itself complex, context-specific and difficult to generalise. These kinds of initiatives require significant organisational change and may include external partners and stakeholders with very different cultures and practices. Evaluation, in particular is challenging and ranges from evaluating specific OER for fitness of purpose, changes in staff attitudes, impact on learning and teaching and longer term impact on institutional practices and the wider community."[2] https://www.jisc.ac.uk/guides/open-educational-resources/sustainability (accessed January 25, 2019).

Questions to Consider: About Evaluation & Sustainability

- What are we evaluating?
- How do you build in evaluation?
- What is the open working group's goal in evaluation?
- How do you report?
- How do report your own activity (e.g. advocacy, capacity building, awareness)?
- How do we report on and show value for the working group itself?

1. Fred Percival, Henry Ellington, and Phil Race, *A Handbook of Educational Technology*, 3rd Edition (London: Kogan Page Ltd., 1993).
2. Lou McGill, "Open Educational Resources: Sustainability," Jisc,

Why do we evaluate?

There are many reasons why open working groups should evaluate their work. It allows you to:

- Share cost savings with students, governments, and institutions. This can provide a rationale for government and institutional funding and student buy-in.
- Link adoption of resources with student learning (i.e., students contributing to resources, customization by faculty).
- Determine and ensure OER quality. Quality is a central concern for faculty in considering OER adoption.[3]
- Share success and OER adoption. Sharing adoptions and the success of open education programs and projects encourages adoptions and increases the awareness of OER.

Who evaluates?

Different institutional stakeholders often are charged with evaluating OER:

- **Students**. For example, students at UBC led an environmental scan of OER [PDF].
- **Faculty researching OER**. For example, Gill Green at UBCO, Christina Hendricks at UBC, Rajiv Jhangiani at KPU, and Georg Rieger at UBC.
- **Libraries**. For example, this research into a community of librarians supporting OER [PDF].
- **Instructional support staff researching OER**.
- **Centres for teaching and learning**.

In Practice

The TRU Special Investment Fund grant, which supports faculty development, has the following requirements built in. The open working group must collect and report on the following:

- Total investment in grants programs,
- Number of funded courses,
- Total enrollment in funded courses over time,
- Average textbook costs (before OER development),
- Total student savings after one year, and
- The extent of faculty dissemination of their work in developing and integrating OER.

3. I. Elaine Allen and Jeff Seaman, "Online Report Card: Tracking Online Education in the United States," *Babson Survey Research Group*, 2016.

21.

Communicate

Report on the Open Working Group

Keep track what your open working group accomplishes share that information. This will help demonstrate the value of the open working group and remind you of your successes.

- Highlight the number of faculty members who attend professional developments and what faculties they are from to show the breadth and broad-level impact. Here is an infographic example from the UBC Flipped Lab Network [Image file].
- Incorporate open working group activity within institutional reports about open education. For example, in the BCIT Open Education Report from 2018, the open working group shared their role as well as information about the grants that they distributed and supported.
- Give conference presentations about the role of open working groups. For an example, check out the Hanging with a Pack – the Power of the Group in Creating Community presentation that was given at the Festival of Learning conference.

22.

Conclusion

Now that you have completed this section, go through the checklist below to guide you through thinking about sustaining an open working group.

Checklist: Sustain an Open Working Group

- Consider the representation of different institutional roles.
- Develop ways of evaluating the impact of the open working group at your institution.
- Find ways of sharing the initiatives and impacts of your work together.
- Evaluate and communicate the impacts of OER and open education on learning, affordability, and equity.
- Consider documenting your processes and resources developed on an open platform.

Appendix 1: A Sprint Toolkit

What is a sprint?

Sprints are probably most associated with software design and are becoming increasingly used as a strategy or approach for developing open education resources (OER). The sprint approach can be used in a variety of contexts where a group of people (often cross-disciplinary) comes together to focus on a specific project. In post-secondary education, sprints are emerging as a way to accomplish a shared goal while working across disciplines and on a short timeline. Hackathons can follow a similar process but often have a competitive element.

Figure 4: A Sprint Process. [Image description]

The sprint methodology involves the following features:

- Short timelines and achievable goals
- Time-boxed working sessions (usually two to three days, but can vary according to context and needs)
- A defined outcome (i.e., textbook, resource)
- A planning process to develop the sprint process
- Multiple perspectives and skill sets
- Identified/agreed roles for participants
- Collaborative rather than competitive development processes

Principles

The principles at the heart of an effective sprint process have been well defined in the literature on agile project management—specifically the values of a scrum—which is a term used to describe a framework within which people can address complex problems. These include five values or principles which we think work well as a guide in planning your sprint:

- **Focus**. Stay focused on the goals of the sprint.
- **Commitment**. Commit to the sprint process, timeline, and goals.
- **Openness**. Highlight where help is needed and identify blocks to progress during the sprint work.
- **Respect**. All contributors have a purpose and all contributions are valued.
- **Courage**. Have the courage to change direction if called for and the courage to open up to new ways of thinking surfaced by the group.[1]

Book sprints

> A book sprint brings together a group of experts to produce a finished book in three to five days. No advance preparation by participants is required—the group is guided by a skilled facilitator, from zero to published book. (This includes written content, illustration, and design.) The content of the finished book is high quality and is often made available immediately at the end of the sprint in all major digital formats and print-on-demand.
>
> booksprints.net

Example: British Columbia in a Global Context textbook sprint

Resource sprints

> The basic motivation for an OER sprint is to bring people together to produce a resource that would otherwise not be created. It's a great way to bring together the skills, energy, and enthusiasm of people to collaborate to achieve something they could not achieve on their own.
>
> OER Sprint New Zealand

OER sprints create and remix open educational resources for adoption and adaption in education.

Examples: Open Case Studies Sprint, Open Science Course Sprint, and How to Conduct Paper Sprints [PDF]

Image descriptions

Figure 4 image description: A Sprint Process.

- Step 1: Plan. The sprint team determines the goals of the sprint, the sprint team, the logistics, and the venue.
- Step 2: Prepare. The team explores the sprint content, process, technology, and collections open resources.
- Step 3: Set up. The team sets up the venue and creates necessary style guides and templates.

1. Dave West, "Updates to the Scrum Guide: The 5 Scrum values take center stage," *Scrum.org*, https://www.scrum.org/resources/blog/5-scrum-values-take-center-stage (accessed February 14, 2019).

- Step 4: Deliver. The sprint facilitator leads the intensive sprint, emphasizing intensive content creation and collaboration.
- Step 5: Debrief. The sprint team captures resources created and plans for the publication process.

[Return to Figure 4]

Media Attributions

Appendix 2: Plan the Sprint

Even before the sprint begins, you will need to set up the right team, develop a goal, compile resource and questions, decide on the duration of the sprint, and set up the logistics (e.g., location).

Develop a goal

For a sprint to be effective, it is important to work together to determine a goal for the sprint. Having a clear goal early will help to create a shared understanding and set of expectations for the sprint. Developing goals for the sprint is something that requires considerable attention and detail, and this process can be informed by design thinking. (For more information, check out this Intro to Design Thinking [PDF].) You may wish to consider hosting a design thinking session before the sprint to work together to develop common goals.

Questions to Consider

- What resource, book, or case study will you be developing?
- Are there other resources that already exist that might be adapted rather than creating a new resource?
- How will this resource be used?
- Who will this resource be written for?
- On what platform will this resource be developed and shared?
- What process will you use to continue the development after the sprint is completed?

Set the duration of the sprint

Determine a length for the sprint. Often open resource sprints are between two and five days, but this really depends on the resource that you need to create. A good rule of thumb is to plan for six-hour days, although this can be longer.

Questions to Consider

- How long will the sprint be?
- How much can be completed/achieved within this timeframe?
- How feasible is your overall goal?
- What process will be required to complete this resource after the sprint?

Determine your sprint team

Roles in a sprint vary depending on the context, as does the number of participants. In "How to Solve Big Problems and Test New Ideas in Just Five Days" the authors suggest that the ideal number of sprint participants is six in order to come to decisions about content relatively quickly.[1] Running an effective sprint requires both a number of content creators and a support team that may include facilitators, technical support, a librarian, and students. For more information on the tasks and duties for each of these roles, see this documentation on sprint roles.

Questions to Consider

- How many people will be involved in the sprint?
- What roles will you include? (i.e., facilitators, instructional designers, content creators, students, technical support, graphic designers)
- Who will be the facilitator(s)? Having a strong facilitator is essential for a successful sprint.
- Who will be the content creators? How feasible is it to require three to six days of their time?
- Who needs to be in the room based on your goal?

Plan the logistics

For a sprint to be successful, you will need to plan out the location and the required resources.

When determining a space for the sprint, try and find a space that is large and has movable seating so that you can use multiple room configurations. The space should have windows, as participants will be there for a long period of time, and be an area where you can minimize distractions. Consider a unique or really interesting venue, as the venue itself can help increase sprint engagement. Also, try to find a space that is separate from the day-to-day workplace of the writers as this will help avoid distractions. A unique space away from the workplace can help engage participants in the sprint process.

1. Jake Knapp, John Zeratsky, and Braden Kowitz, *Sprint: How to Solve Big Problems and Test New Ideas in Just Five Days* (New York: Simon & Schuster, 2016).

Make a list of all the resources that you will need for the sprint. As a sprint facilitator, you will have very limited time to gather resources during the sprint. In Appendix 4: Set Up the Sprint, we list the key materials to bring into the session.

Determine a platform

Determining which platform or tool creators will use to write can be a decision made by the group or be suggested by the organizer/facilitator. In general, when selecting a tool, you will want to find a tool that is easy to create and collaborate with and if needed, provide support or training for sprint participants before and/or during the sprint.

You will also need to decide whether you will want content to be developed in the platform where you will be publishing it. Some of the challenges of having participants work directly in the platform that you will publish the resource in may include the time it takes participants to learn a publishing tool, the inability to collaboratively create and edit content, and the lack of space to provide feedback on each other's work.

A second approach is to meet the participants where they are at by having them write the content in a platform that they are familiar with, such as Google Documents or Microsoft Word. Once the sprint is over, or even during the sprint, the sprint organizer can assign a learning designer to copy this into the publication platform. The challenge to this approach is that it can be difficult for participants to conceptualize what the resource will look like in its final form. This can impact how they set up and organize the resource. One way to mitigate this is to include a learning designer within your sprint team to create prototypes of the content that is being created live during the session.

Below are a couple of examples of different learning platforms that you may use in the sprint for both publication and collaboration.

Suggested platforms for open publishing

Pressbooks

Pressbooks is a book content management system that exports in multiple formats: ebooks, webbooks, print-ready PDF, and various XML flavours. Pressbooks is an excellent platform for creating high quality, open, and multimodal publications. It has collaboration features including multiple users with varying permission levels, locked editing if another user is editing a page, and collaborative annotation capabilities using the Hypothesis plugin. If participants are familiar with WordPress, they will be able to apply this to Pressbooks, as Pressbooks has been developed using the WordPress platform. Pressbooks is available at pressbooks.com and faculty/staff at British Columbia post-secondary institutions can use Pressbooks by registering at pressbooks.bccampus.ca.

MediaWiki

MediaWiki is a free, server-based software, licensed under the GNU General Public License (GPL). It is the platform that is used by Wikipedia and can be used if your institution or organization has installed it on their servers. MediaWiki can be easily edited and participants can use Wiki markup or

the visual editor fairly easily. Once created, MediaWiki is easy to edit, and it saves all content revisions. MediaWiki content can be re-purposed and embedded in other sites.

Suggested platforms for co-creation

Etherpad

Etherpad is a customizable, open-source online editor providing collaborative editing in real-time. You will need to host Etherpad on your own server, but you can try it out here: Beta-Etherpad

Google Documents

Google Documents is a platform that many participants are familiar with and one that has great features for up to fifty real-time collaborators, including collaborative document writing, commenting, suggested changes, and the ability to easily add users and share.

Appendix 3: Prepare for the Sprint

Because you will need the sprint team to work as effectively as possible during the sprint time, careful preparation will ensure that they are able to use the limited time most effectively. Below are some strategies and approaches for helping your team to prepare for the event.

Communicate the goal

What content knowledge will all members of the team need in order to participate successfully in the sprint? For the content creators, they will typically come with an extensive understanding of the subject area they will be developing content for. However, there may be different perspectives, approaches, or ideas about the subject area. Establishing a clear goal and vision for the development of the resource is part of preparing the content creators for the sprint. This may require meetings before the sprint to discuss these perspectives and approaches. For example, during the open case study sprint at the University of British Columbia (UBC), the content creators had differing views on what a case study entailed, depending on their individual disciplines. The organizers needed to arrange pre-sprint workshops to determine the elements involved in a case study.

Prepare open resources

As described in the section on roles, the librarian can gather open resources that can be adapted and revised for the sprint and reference materials related to the content area for citing and referring to during the sprint. If the sprint is focused on developing an open resource, it is valuable to find open resources such as images, videos, media, documents, and open courses that can be adopted, adapted, and revised during the sprint. Ideally, create a list of resources that can be used within the resource or text before the sprint. Work with your librarian to consider the licensing requirements for the resources that you use in the open resource.

The following platforms and search engines are useful to find open resources:

- Creative Commons Search. A search tool that aggregates open content from publicly available repositories of open content.
- Creative Commons Search Page. A collection of links to searches for a number of open repositories, including Flikr and Pixabay for images and others containing videos and vector diagrams.
- Wikimedia Commons. A collection of millions of freely usable media files. This is an excellent resource for technical or discipline-specific media and resources.
- The Noun Project. A collection of openly licensed icons that can be used for resource navigation.

- UBC Library Open Resource Portal. The UBC Library Guide for finding and using open resources.

Provide technology training

Depending on the software/platform that you select, you may need to provide training for your team before the sprint begins. This could involve a workshop or supplying your team with documentation. You will want to ensure that you have supported your team in learning about the technology or have the creators work with technology that they are comfortable with.

Communicate the process

Before the sprint, you need to let everyone who is participating in the sprint know what to expect. This will ensure that each member of the sprint team has blocked off adequate time to actively participate in the sprint. The team must also understand that they will need to clear their schedule so that they are not trying to complete other work during the sprint time. Presence is essential to running an effective sprint, and the team needs to understand what this entails.

It is also useful at this time to provide the team with a simple agenda for the sprint and make them aware that the session will involve a combination of brainstorming, intensive writing, and giving and receiving feedback. Consider providing the sprint team with the following information well in advance of the actual sprint.

Checklist

Ensure that your sprint team knows the following information:

- The dates and duration of the sprint
- The location of the sprint and any travel requirements
- The importance of participants being present and actively participating in the sprint
- Description of the catering provided or the options for meals, coffee, etc.
- Technology requirements (i.e., will they need to bring a computer or download a specific program?)
- Where to find resources for using the relevant programs/software
- A description of the sprint team (i.e., what support can they expect during the sprint? Instructional design, library, technical support?)
- A link to key resources that can help them to prepare for the sprint
- A reminder of the overall goal for the sprint and what you expect to complete by the end it
- A rough agenda for the sprint

Appendix 4: Set Up the Sprint

Set up a style guide

Although you need to be flexible during the sprint setting up a basic style guide in advance will ensure that the different writers maintain similar tone, citation, organization, etc. This will save time during the sprint, and if done well, it can increase confidence in the writing team. Developing this style guide can be done in collaboration with the group or you may wish to come up with this as the sprint facilitator.

A style guide should be used when writing an open textbook to ensure that style and formatting is consistent throughout the work. (Here is an example of a style guide.) Style guides usually include citation style as well, i.e., how cited or referenced material should be treated both in the text (in-text) and within the reference list. Commonly used style guides include the following:

- *APA Style*. APA (American Psychological Association) style is typically used to cite and style works in the social sciences and education.
- *The Chicago Manual of Style Online*. Chicago style is most often used to cite and style works in the humanities.
- *MLA Style Manual*. MLA (Modern Language Association of America) style is most frequently used to cite and style works in the literary and humanities fields.
- *Canadian Press Stylebook*. The Canadian Press style is the standard style guide for those working in media and communications.

Templates and organization

Providing templates for the content creators can help everyone develop a more cohesive resource. It can also make the writing process easier by creating a structure that writers can fill out during the session. In the Open Case Study Sprint at UBC, the sprint team collaboratively developed a MediaWiki template for the case study writing. If you are using platforms such as Pressbooks, you can create information boxes to structure common elements like learning objectives, chapter summaries, etc. This can guide the participants as they develop the resource.

Figure 5: Sample Learning Objectives box.

Sprint resources

During the sprint, the facilitator and sprint team will need to have resources that support a variety of group activities. The following checklist goes over some key items.

Checklist

- Large post-it-notes
- Flip charts and flip chart stands for group work
- Flip chart makers – sharpies, enough for each participant
- Large poster paper for sprint mapping
- Masking tape
- Lots of whiteboards
- Whiteboard markers
- Small dot stickers for voting

Set up the space

Before the sprint, you will need to set up the space for the sprint. Consider the goals and the values of the sprint in the set-up. How can you set up a space that will promote focus and intensive writing/creation? How can the space also support collaboration and creativity? The set-up of the space can help make a sprint successful or not.

Materials to support the process

When setting up the room, there are a number of different materials you can use to help support the process. Setting these up around the room can help the facilitator and the sprint team to structure their facilitation. These materials can act as a shared resource for all of the sprint participants to view and add to, as well as an archive/record of how the resource is being created.

Kanban board

A Kanban board is a tool that is used in agile development to keep track of backlogs and the progress of tasks from initiation to completion. In resource sprints, Kanban boards can be used to indicate what is being worked on, what stage each element of the resource is at, what still needs to be developed, and what is ready for review. Have participants use sticky notes during the session to keep track of both tasks and processes.[1]

Figure 6: A Kanban Board.

Parking lot

A parking lot is a space for the sprint team to record topics, themes, and ideas that are unable to be addressed in the sprint. Use a sheet of flip-chart paper or a large piece of paper and point this out to all of the sprint participants at the outset of the sprint. Facilitators can refer to this when questions/issues come up during the sprint that, due to time or resources, cannot be dealt with at the time. The parking lot also can be used to capture ideas going forward as you create the resource.

Attributions

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1. "Kanban board," Wikipedia, https://en.wikipedia.org/wiki/Kanban_board (accessed January 25, 2019).

license

Appendix 5: Deliver the Sprint

Now that you have gone through the groundwork to plan and set up a successful sprint, let's take a look at the process for a sprint itself. Depending on the context and goals, there are different stages that you can include in a book or resource sprint. We have adapted the structure framework described by D. Berry and M. Dieter:[1]

1. **Set the stage**.
2. **Begin concept mapping**. Develop themes, concepts, ideas, develop ownership, etc.
3. **Establish structure**. Creating chapter headings, divide the work, scope the book.
4. **Write**. Distribute sections/chapters, writing and discussion, but mostly writing.
5. **Composition**. An iterative process of re-structuring, checking, discussing, copy editing, and proofing.
6. **Publication**.

In the section below, we have unpacked these stages and included activities that can be used to support each stage. Sprint approaches and activities will vary considerably depending on the duration of the sprint and the overall goals.

Set the stage

Sprints will involve participants working together for a long period of time in a situation that can involve personal dynamic and vulnerability as participants are involved in sharing their work and receiving feedback. Setting the stage can help to build trust and connection between participants and ensure that they are able to successfully contribute and provide constructive feedback to one another throughout the sprint.

Figure 7: Sprint Elements.

Icebreakers

Icebreakers can be used at the outset of the sprint to help to build rapport and connection between participants. They also are a way for sprint participants to learn about each other beyond their roles within the sprint. Although it can be tempting to not include an icebreaker, these activities can help ensure the sprint's success. Use icebreakers that are aligned with the goal and the processes of the sprint.

1. David M. Berry and Michael Dieter, "Everything you wanted to know...," BookSprints, https://www.booksprints.net/2012/09/10/everything-you-wanted-to-know/ (accessed February 28, 2019).

Introductions

Introductions can be a powerful way to connect the group. Rather than typical introductions, consider questions that move beyond the participants' roles or titles at work. For example:

- Where did you grow up?
- Why are you participating in this sprint?
- What do you bring to this group?

Superpowers

Everyone gets two to three minutes to share what "superpower" they bring to the team. Other members of the team give examples of how this superpower could contribute to the team's success over the next few days.

Things we did not know

Each person writes five things about themselves on an index card that the other people in the group will not know. The facilitator collects these cards in a container and then goes around the room and each participant picks a card not their own. Each participant reads the five interesting things on the card and the other participants guess who the person is.

Group agreements

Group agreements, or working agreements, are simply mutually agreed "contracts" for the way a group chooses to interact. They're often manifested in written lists of behaviours, such as "turn mobile phones off" or "raise a hand if you would like to speak."

Group agreements can be a very useful facilitation tool. They have the potential to head off the vast majority of "difficult" behaviour and domination in any group processes. This opens up the way for the quieter voices and the least assertive to play a more active role in the group. But it would be a mistake to think that the group agreement does all that on its own. Negotiating an agreement raises the consciousness of the group about issues of group dynamics and participation, but it needs to be supported by a constant flow of reminders, gentle (and some less gentle) challenges, and body language (gestures and facial expressions).

Tips for negotiating a successful agreement:

- **Ensure the agreement is proposed in practical terms**. For example, "What does this tool do for us as a group?" People need to understand what they're being asked to commit to. A clear rationale is essential for this.
- **Take the time to negotiate the agreement fully at the start**. It sends a clear message to the group that you, the facilitator, are serious about participation.
- **See every agreement as negotiating space**. This is important for those who find the dominant culture difficult to participate in, for whatever reason. Negotiate for full

participation. The agreement should answer the question, "How will this behaviour make this meeting accessible for all of its participants?" rather than just reinforcing mainstream norms.

- **List specific behaviours, not vague concepts**. "Encourage participation" is laudable, but vague. Ask the group what behaviours will encourage participation and list those instead.
- **Negotiate a culturally appropriate agreement**. Not all cultures share the same behavioural norms. One voice speaking at a time might be polite and sensitive group behaviour in one culture. "No interrupting" might be appropriate for an agreement in that context. However, another culture might find more animated conversation, with several voices speaking and frequent interruption, the norm.
- **Go back to the underlying purpose of the agreement – what do we want to achieve?** A safe space for everyone to feel able to contribute, have their voice heard, and their point respected? So work from that—it may lead you to behaviours like "No interrupting," but equally it may not.
- **Get full agreement**. Don't simply read through a proposed list of behaviours for agreement and end with an "Is that OK?", accepting the resulting low murmur as assent.
- **Use the negotiation process to cement your mandate to facilitate with the group**. It's a two-step process: "Can you all sign up to these behaviours?" and "Can I have your mandate to support you in behaving this way?"

Concept mapping

The concept-mapping stage of the sprint is a time to come together to map out the process and goals of the sprint. By the end of this section of the sprint, you will have established a shared understanding of what you hope to achieve by the end of the sprint and how you will go about completing the sprint. During this time, the facilitator will need to ensure that there is a group agreement on both the sprint goals and the process.

Sprints often include activities that facilitate the development of shared goals for the textbook, resources, or case studies that you are creating. By creating a set of shared goals, you can ensure that the group is developing a cohesive resource. Examples of approaches to goal setting could include a conversation, a facilitated activity that has participants brainstorm goals and cluster goals on sticky notes, or even using dot voting to determine the goals to focus on.

Brainstorming and clustering

Ask participants, individually or in pairs, to come up with key goals for the sprint based on your overall sprint goals, and write these on post-it notes. For example, a goal could be to develop the first three modules of a resource or to create a prototype for a book. Then have everyone stick these goals up on a whiteboard or flip chart and group them by theme. The facilitator then works through the goals with the group, asking questions such as, "Is this goal possible within this time? Does this work for the audience who will be using the resource? How might these goals be connected/aligned? What is missing?"

Mapping the process

Collaboratively working together to map out or draw out the process for the sprint helps the facilitator ensure that all participants are aware of the sprint process that you will be following. This activity also allows the process to be changed to fit the participants' goals and can be referred to throughout sprint checkpoints to ensure that everyone is on task and helps to revise the process as needed as it progresses. One approach to this activity is to start with the end point in mind for the sprint, i.e., we will have created a textbook draft. During the UBC Case Study, one of the facilitators began with the endpoint: "By the end of the sprint, we will have created at least one case study per discipline, written about three case-studies from each of our perspectives," and asked participants, "What will it take to get there?" From there, the group mapped out the checkpoints for each of the two days and used these throughout the sprint to ensure that everyone was on task adapting these as needed.

Structuring

The next step in a sprint is to start working together to structure the content or resource together. This is an important sprint element because the group can work together to develop a shared structure for the content and collaborate to create an approach and a way of envisioning the overall resource. It also provides the group information about what resources will be required to complete the text or resource. An approach to this often used in textbook sprints is to work to develop a textbook table of contents for the text.

In the case study sprint, the facilitator stuck one piece of flip chart paper on the wall for each case study heading that were determined together before the sprint. Participants worked individually and wrote down on post-it notes and brainstormed how their case study would include each of these elements. Through this activity, participants were able to see what each other was planning for their case study. As a debrief, the participants were asked what sections they wanted to revise, remove, or add to the case study template, and they decided to add a learning objective section.

By structuring the content, the facilitators have a content blueprint/plan that they can refer back to during the writing process, and this can also help to create consistency and a shared understanding of the content structure. The facilitator can also use this to create headings, sections, or groupings in the final product.

Creating a shared table of contents

The facilitator puts the goals for the resource/book on a whiteboard. Each participant works on their own using small post-its and writes down specific topics that they feel should be included in the resource. They add each of these post-its to the board, and as they do this, they begin to cluster them. The facilitator has the group cluster the post-it notes together. When the group is satisfied with a particular cluster of post-it notes, the facilitator places a large post-it note above the small cluster of topics and works with the groups to come up with a chapter title for the topics. The facilitator continues this process until the group has come up with a table of contents and chapter titles for the resource.

Drafting/storyboarding

In design sprints and boot camps, there is typically an ideation stage during which participants brainstorm and begin to draft ideas for their chapter or case. Approaches to this can include having participants create a storyboard, write a simple outline, or do a quick-write activity. As a debrief, the facilitator can lead a short feedback session with the group to provide suggestions for early revisions.

Writing

At the heart of the sprint process is focused writing time. Once the creators have set goals and completed the initial structuring, they can start writing their section of the case study, textbook, or resource. In some sprints, the creators can work in small groups and collaboratively write. In other contexts, each creator works individually to create a section of the content. During the UBC Case Study sprint, each participant worked individually in short 1.5- to 2-hour intensive writing blocks to create their case studies.

Composing

Feedback and revision cycles

Although lots of writing time is essential in sprints, this needs to be balanced with time for feedback and revisions. This can be set up as a series of checkpoints during the writing process where creators can share what they have completed so far, gather feedback from the group, and work on revisions. Finding creative ways of having the participants share and respond to each other's work can maintain energy and momentum and encourage sharing.

Approaches to sharing include lighting talks, short presentations (three to five minutes) by each participant going over their main points, and open-discussion time for feedback. During the Sustainability Case Study Sprint, each of the participants wrote a case study about sustainability for their discipline. As a way to develop their case further and receive feedback, they had students read their case study and give feedback. They also shared their case study with a faculty member from another discipline who added a section to the case about how an economist, legal expert, etc., would respond to this case through their disciplinary lens. This provided feedback to the original creator and expanded the overall case study itself.

Publication and sharing

Arthur Gill Green, a geography instructor who participated in the geography textbook sprint, suggests that the text or resource that you develop should be viewed as always in a perpetual draft state. The resource will continue to be adapted and revised after the end of the sprint. With open textbooks and other OER, there is often a continuous development process. Reminding the writers that the content does not have to be perfect can ease stress about creating a final perfect project and allow them to focus on completing the goal of the sprint.

Attributions

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Appendix 6: OER Summer Action Plan (Adapted from OpenStax)

Nicole Finkbeiner

Complete all relevant tasks below by mid-July (unless otherwise noted) to hit the ground running for the next Fall semester.

Meta

- Create goals for the upcoming year.
- Goals should focus on outcomes, not actions:
    - Number of faculty adopting OER
    - Number of students impacted by OER
    - Student savings due to OER
    - Student success due to OER
- Create a plan for how to reach your goals for the upcoming year.

Events

- Ask the senior administrator who gives a speech at beginning of the semester (convocation) to include a plug for OER. Send one to two short sentences as suggested language. Example: “As part of our ongoing student success efforts, I also encourage you to consider using open educational resources for your courses. OER also allow you greater freedom in your courses because they aren’t limited by heavy copyright restrictions.”
- Ask to present about OER at both full-time and part-time new faculty orientations that happen in the fall.
    - July-August: Prepare presentation.
- Ask to host OER-training sessions as part of your institution’s fall training day.
    - July-August: Prepare presentations for these training sessions.
- Reach out to department chairs (those where OER is readily available) and ask for five to ten minutes at their fall department kick-off meeting to talk about OER. Schedule dates/times of meetings.
    - July-August: Prepare a one-sheet handout (not a link) to give to faculty listing the top one to three OER resources relevant to their department, with links to the books provided.
- Schedule fall OER-training workshop dates.

    - Book rooms for the workshops.
    - Line up presenters.
    - July-August: Develop training materials and handouts.
- If planning an institution-wide or regional event in either fall or early spring, start scheduling now.
    - Decide when your event will be held.
    - Decide what senior leadership or other VIPs from your institution need to be there, and sync possible event dates with their schedules.
    - If you want an external national speaker, contact them now to secure a date. Most of the national speakers book up three to six months out.
    - Place holds and/or schedule important rooms for the event.
    - Create a rough outline of the event.
    - Brainstorm who you want on your planning committee and start meeting, or if there will be faculty on your committee (which is encouraged), schedule the first planning meeting when the faculty are available.

Grants

- If offering grants for adoption, adaptation, or creation of OER in the fall:
    - Secure funding for the grants.
    - Develop grant criteria and processes for grantees.
    - Decide on deadlines for grants (due dates for submissions, when grantees will be notified, etc.).
    - Develop grant-submission review process (who will review grants, what the criteria will be to review grants).
    - Meet with whomever will distribute the grant money to faculty to ensure no issues in the process.

Policies and procedures

- Research steps to create or update course materials policy, OER policy, and textbook selection processes if you plan to update any of these within the following academic year.
    - Begin the processes or, if you need to wait until fall for stakeholders to return, get on the agenda for the first policy meeting in the fall.
- If you plan to implement an OER class search function within the following academic year, research the steps to accomplish this.
    - Begin the process, or if you need to wait until fall for stakeholders to return,

schedule a meeting for fall.

- At the meeting, be sure to secure commitments and due dates. Schedule check-in meetings right after major due dates to keep everyone on track.

General promotion and other tips

- Meet with your marketing team.
    - Provide dates, times, and locations of all events, and work with them to create a plan for marketing for each event.
    - If doing a general marketing campaign for OER, meet with them regarding the development of the design and agree on tasks and deadlines.
    - If doing a grant program, plan out the marketing of the grants and the post-promotion of the grantees.
- Purchase sample print copies of OER to pass around and show faculty at all presentations and events you hold throughout the year.
    - BCcampus books may be printed on demand
- Create a sign-up sheet. Take to every OER presentation you do (such as new faculty orientations) and pass around for faculty to sign up to learn more.
    - Hint: More people will sign up if the first or second person who gets the sign-up sheet adds their information to it. So, hand it to someone who you know will fill it out.
- Block off a few hours on your schedule one week after each event to follow up with any faculty who attended the event and see if they are interested in piloting or adopting OER.

Student engagement

- Identify student advocates and SGA staff for the coming year.
    - Obtain their timelines for the formation of committees for the coming year.
    - Follow up with a stated intent to pass resolutions.
    - Schedule meetings with them to explain OER and how they can be involved.
    - Once you have established a relationship with a group of students, schedule a biweekly meeting to check in on the progress of OER efforts.

Wrap up the current year

- Finalize all of your OER data for this year.
    - Gather information about faculty adoptions of OER and their student impact.

- Analyze trends and momentum.
    - Write up any internal reports you need to support your work.
    - Analyze what went well and what didn't go well.
    - What tactics did you do this year that worked? What were those that didn't work?
        - Example: How many faculty who could adopt OER attended any workshops you held? Was the attendance worth the time you invested in them? Did any of the faculty who attended adopt an OER? If so, how many students did that new adoption impact over the course of a full year?
    - What messages about OER resonated with your faculty? Which messages didn't?
    - What marketing tactics (sending emails, posters, etc.) worked? What didn't work?

Attributions

Appendix 7: Open Technology

> Open education is not limited to just open educational resources. It also draws upon open technologies that facilitate collaborative, flexible learning and the open sharing of teaching practices that empower educators to benefit from the best ideas of their colleagues.
> Cape Town Open Education Declaration, 2007

There are a number of supports and open technologies that you may wish to explore to help administer your open working group, implement at your institution, or share with faculty, staff, and students.

BCcampus Open Education

For B.C. institutions, BCcampus can support the adoption of this *Working Group Guide* by creating a cloned copy in Pressbooks. BCcampus also provides support and access to technologies such as Pressbooks for B.C. faculty that may help with your collaboration efforts.

OpenETC

The OpenETC is a community of educators, technologists, and designers sharing their expertise to foster and support open infrastructure for the B.C. post-secondary sector. No contracts or agreements are required to join them, just a willingness and ability to actively participate in their collective endeavour to:

- Encourage technological autonomy and provide ways for students, faculty, and institutions to own and control their own data;
- Lower the barrier to participation on the open web for B.C. faculty and students;
- Provide a more sustainable ed-tech infrastructure to B.C. post-secondary education that gives institutions more control over their tools. Institutions are currently at the mercy of vendor pricing, upgrade cycles, and exit strategies. This puts institutions at a certain degree of risk when there are changes to any of the variables beyond their control. Open-source approaches reduce the risk to institutions in this regard; and
- assist B.C. faculty in evaluating and making informed pedagogical decisions around open-source teaching and learning applications.

The OpenETC has a number of software platforms:

- **WordPress**. OpenETC offers WordPress-powered sites with a curated collection of plugins, widgets, and themes and also allows you to create a new site from WordPress templates.
- **Mattermost**. An open-source, self-hosted Slack-alternative. As an alternative to proprietary messaging platforms, Mattermost brings team communication into one place, making it

easily searchable and accessible from any device.

- **Sandstorm**. Students and educators deserve access to the best open-source web apps. With a few clicks, students and educators can enjoy 70+ open-source web apps, all pre-approved, security audited, and hosted within British Columbia on the OpenETC Sandstorm server.

Appendix 8: Kanban and Project Management

Ross McKerlich

At first glance, it might seem that the fields of project management and sales and marketing do not mix with the world of open education. Profit and the social justice origins of open education may seem like oil and water, yet process and messaging have an important role to play in open education. Open education also has its roots in the open source movement commonly associated with the software industry, where project management tools are well used. This chapter describes Kanban, a common project management tool, and how it might be used in conjunction with sales and marketing strategies to further advance open education at an institution.

Kanban

Kanban is both a project management tool and a workflow management tool. It has its origins in the automotive industry (see the Toyota Production System) in Japan. The word “kanban” — Japanese for “signboard” or “billboard” — is intended as a visual, real-time information system. At the most basic level, it tracks workflow using task cards in three columns: To Do, In Progress, and Done. As tasks progress, they can be moved from one column to the next, allowing for clear communication with all involved in the project.

Open education working groups can use Kanban to better focus and coordinate their work by allowing individuals access to a shared Kanban board, so everyone knows who is working on what and what stage they are at in the process. This online tool also minimizes time and geography barriers, factors that often affect open education working groups.

There are several Kanban tools available. One that is free and open source is called Wekan, which is available as an app on the Opensource Apps for Educators section of the OpenETC site. A group of B.C. educators, technologists, and instructional designers support this app framework hosted on BCNET EduCloud. A free account must be created to access the Wekan app, along with more than 50 other apps. The proprietary version from Microsoft 365 comes with a planner, which is great for integration with Calendar and Teams.

Kanban and the Sales Pipeline

In sales customer relationship management systems, the stages of a sale are collectively called a pipeline. Open education advocacy work has some similarity to sales, because in the end, faculty must switch products — in this case, from a publisher resource to an open educational resource (OER). There is often a journey to convince faculty to go from using a publisher resource to an open resource, and this movement can be tracked using a Kanban board. To assist with identifying where faculty are on adopting, creating, or promoting open education, this open pipeline is suggested:

- Promising Prospect
- Probing Possibility
- Active Adopter
- Contributing Creator
- Passionate Promoter

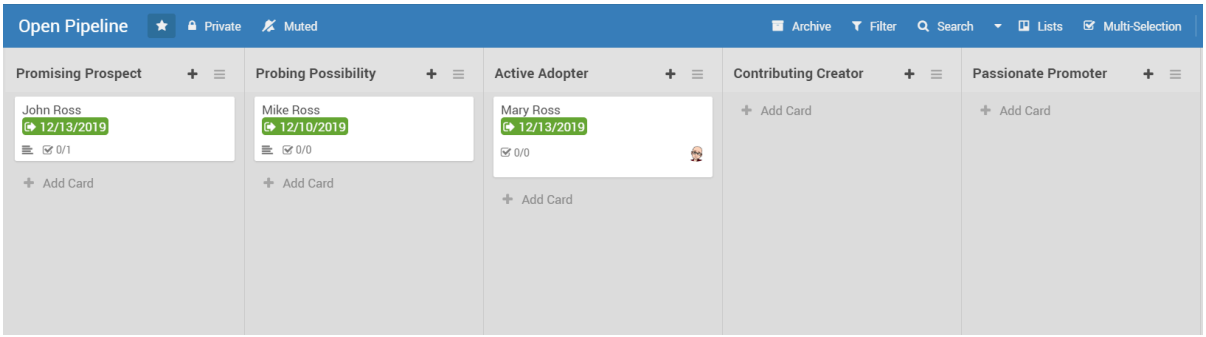
A **Promising Prospect** could be an English professor you know who is teaching a class for which there is a suitable OER available. You might approach them, suggesting that they use an OER.

As a **Probing Possibility**, the English professor is interested, but needs a bit more convincing and to do further evaluation of the OER to see if it is suitable.

When the English professor adopts the OER, they become an **Active Adopter**.

If they use the OER and find they want to adapt it or create something new, the English professor becomes a **Contributing Creator**.

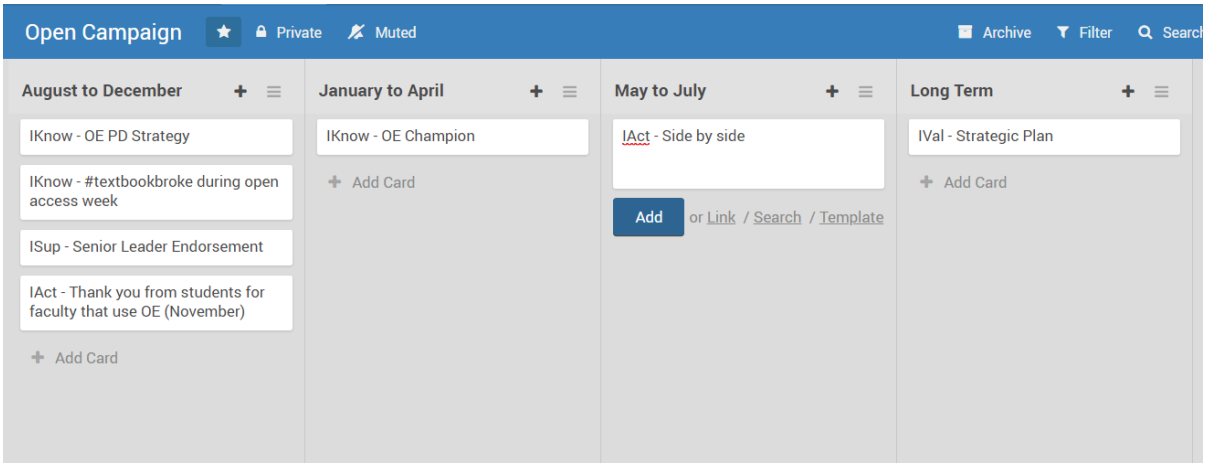
Finally, as an adopter or a creator, the English professor could become a **Passionate Promoter** and advocate for OER in their institution and beyond.



Relationships vs. Pipeline

It should be noted that OER advocacy in an institution is all about relationships, and people should not be labelled by a pipeline stage. It can be useful, however, to identify and acknowledge where your colleagues are at in the open pipeline in order to track progress.

Just like the sales connection described above, the importance of messaging and communication is essential to advocating for open at a post-secondary institution. Some strategies will work, and others may fall flat, but planning is essential. Kanban can help in this area as well, with columns that are descriptive of time periods and cards that describe open strategies and define how they might be executed.



[Long Description]

The strategies, for example, could be connected to institutional values, knowledge, action, and policy. The combination of the two tools — sales pipeline and Kanban — could help streamline open education groups' operations for the year ahead. A planning session in June or July, for instance, would still have to take place, but once the board was established, the campaigns could be easily executed and monitored.

Post-secondary institutions are dynamic environments, so there must be an element of flexibility in the campaigns, but the time frame design could help an open education group plan, execute, and evaluate open campaigns.

> Also see 20 Questions to Ask about Open Education [PDF] and [fillable PDF]. These 20 yes or no questions cover institutional values, knowledge, support, action, and policy and will give the advocates in your institution an indication of where there might be some gaps. To address those gaps, see this searchable database of corresponding open education strategies.

Long Description

Open Campaign Kanban board long description: A Kanban board titled "Open Campaign." Its columns describe time periods, and its cards define and describe open education advocacy strategies. The columns and cards are laid out as follows:

- August to December
    - IKnow – OE PD Strategy
    - IKnow – #textbookBroke during open access week
    - ISup – Senior Leader Endorsement
    - IAct – Thank you from students for faculty that use OE (November)

- January to April
    - IKnow – OE Champion
- May to July
    - IAct – Side by side
- Long Term
    - IVal – Strategic Plan

[Return to Open Campaign Kanban board]

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Appendix 9: Working Groups in B.C.

For current information about working groups in, and other open education information for, post-secondary institutions in British Columbia, see the Post-Secondary Directory.

List of Links by Chapter

Front Matter

Accessibility Statement

- Accessibility Toolkit – 2nd Edition: https://opentextbc.ca/accessibilitytoolkit/
- Appendix A: Checklist for Accessibility: https://opentextbc.ca/accessibilitytoolkit/back-matter/appendix-checklist-for-accessibility-toolkit/
- Download this book in another file format: https://opentextbc.ca/workinggroupguide/
- Report an Open Textbook Error: https://open.bccampus.ca/reporting-an-open-textbook-error/
- Web Content Accessibility Guidelines 2.0: https://www.w3.org/TR/WCAG20/
- Web version of the Working Group Guide: https://opentextbc.ca/workinggroupguide/

About This Guide

- BCcampus: https://bccampus.ca/about-us/
- BCcampus Open Education: http://open.bccampus.ca/
- BCcampus Writing Guidelines for Style and Tone: https://bccampus.ca/bccampus-editorial-guidelines-for-tone-voice-and-style/
- British Columbia Ministry of Advanced Education, Skills & Training: https://www2.gov.bc.ca/gov/content/governments/organizational-structure/ministries-organizations/ministries/advanced-education-skills-training
- Hewlett Foundation: http://www.hewlett.org/

Preface

- British Columbia Institute of Technology (BCIT) Open Education Working Group: https://open.bcit.ca/
- Canada's Open Education Initiatives: https://open.bccampus.ca/open-textbooks-canada/
- Capilano University OER Working Group: https://cte.capilanou.ca/resources/oer/
- Definition of open education: http://wiki.ubc.ca/Documentation:Open_Education
- Emily Carr University of Art + Design Open Educational Resources: http://www.connect.ecuad.ca/library/oer
- Kwantlen Polytechnic University (KPU) OER Working Group: http://www.kpu.ca/open/

- Leeward Community College, Hawaii OER Committee: https://sites.google.com/a/hawaii.edu/oer/oer-campus-committee
- Openness in Education [PDF]: https://library.educause.edu/~/media/files/library/2012/5/pub72036-pdf.pdf
- Seneca College OER Committee: http://open2.senecac.on.ca/sites/openeducation/
- University of British Columbia (UBC) Open Working Group: https://open.ubc.ca/about-us/

Part 1: Establish a Working Group

4. Members and Partners

- B.C. Open Education Librarians: https://bcoel.ca/
- Open but not Free: Invisible Labour in Open Scholarship panel: https://www.lib.sfu.ca/help/publish/scholarly-publishing/33758

6. Informal or Formal?

- B.C. Open Textbook Collection: https://open.bccampus.ca/find-open-textbooks/
- Library Guides: http://guides.ecuad.ca/
- Open Educational Resources section: http://www.connect.ecuad.ca/library/oer
- open.ubc.ca: https://open.ubc.ca
- Teaching + Learning Centre: http://tlc.ecuad.ca/
- Teaching and Learning Library Series: https://emilycarr.bc.catalogue.libraries.coop/eg/opac/results?query=Teaching%20and%20Learning;qtype=keyword;locg=610;detail_record_view=1;facet=series%7Cseriestitle%5BTeaching%20and%20learning%5D
- Terms of Reference: https://docs.google.com/document/d/1AaDuv4SIW1WwgduQHdejaiUdAucljDLhc5vnmfqaW6o/edit?usp=sharing

7. Create an Inventory of Open

- 2016 survey of faculty using OER [PDF]: https://bccampus.ca/files/2016/01/BCFacultyUseOfOER_final.pdf
- BCcampus Open Education: https://open.bccampus.ca/
- OpenStax: https://openstax.org/contact?subject=College/University%20Partnerships
- Self-reporting form and a cost calculation: https://open.bccampus.ca/2015/02/18/calculating-student-savings/
- SPARC: https://sparcopen.org/
- Track student savings in the United States due to OER: https://sparcopen.org/news/2018/

estimating-oer-student-savings/

- UBC Open Snapshots: https://open.ubc.ca/category/updates/open-snapshots/

8. Identify Funding, Resources, and Support

- BCcampus: https://bccampus.ca/
- Simon Fraser University (SFU) Open Educational Resources Grants: https://www.sfu.ca/oergrants.html
- Shuttleworth Foundation Fellowship Program: https://www.shuttleworthfoundation.org/fellows/
- Teaching and Learning Enhancement Fund (TLEF): https://tlef.ubc.ca/
- TLEF criteria: https://tlef.ubc.ca/application/tlef-criteria/
- TRU Student Union's (TRUSU) 2016 Open Textbook campaign: http://trusu.ca/news/studentcaucus/open-textbooks-campaign-launch/
- William and Flora Hewlett Foundation: https://www.hewlett.org/strategy/open-educational-resources/

Part 2: Run a Working Group

11. Key Considerations

- Open Access Week Graphics: http://www.openaccessweek.org/page/graphics
- Open Ed Tech Collaborative: https://opened.ca/
- Open Education Week: https://www.openeducationweek.org/
- UBC Wiki (MediaWiki): https://wiki.ubc.ca/Open_UBC_Working_Group

12. Engage Different Stakeholders

- Accessibility Toolkit: https://opentextbc.ca/accessibility/
- B.C. Open Education Librarians group: https://bcoel.ca/
- Course catalogues: https://bceln.ca/services-initiatives-resource-sharing-bc-open-textbook-marc
- Library guides: https://bcoel.ca/bc-open-education-library-guides/
- Knowing Home: Braiding Indigenous Science with Western Science: https://pressbooks.bccampus.ca/knowinghome/
- KPU librarians support faculty in publishing open textbooks: http://www.kpu.ca/library/OPUS

13. Start Big and Start Small

- Creative Commons Attribution Licence: https://creativecommons.org/licenses/by/4.0/
- OER Policy Development Tool: http://policy.lumenlearning.com/
- Open UBC Working Group portal: https://wiki.ubc.ca/Open_UBC_Working_Group

14. Provide Grants and Support

- OPuS, KPU's Open Publishing Suite: http://www.kpu.ca/library/OPUS
- Pressbooks: https://pressbooks.bccampus.ca/

15. Events and Initiatives

- B.C. Open Textbook Collection: https://open.bccampus.ca/find-open-textbooks/
- BCOEL: https://bcoel.ca/
- Cascadia Open Education Summit: https://bccampus.ca/events/cascadia-open-education-summit-2019/
- Creative Commons Certificate program: https://certificates.creativecommons.org/
- Creative Commons image search tool: https://ccsearch.creativecommons.org/
- Evening socials with a panel: https://www.openeducationweek.org/events/open-education-week-uncommon-women-panel
- Geography open textbook sprint: https://open.bccampus.ca/2014/07/03/book-sprint/
- Getty Institute of Open Images: http://search.getty.edu/gateway/landing
- Hackathons: https://en.wikipedia.org/wiki/Hackathon or https://events.ctlt.ubc.ca/events/learning-analytics-open-data-hackathon-3-0/
- Lunchtime presentations: https://open.bccampus.ca/open-education-week-events-calling-lower-mainland-and-vancouver-island-institutions/
- One-day conferences: http://www.kpu.ca/library/open-education-week
- Open Access Week: http://www.openaccessweek.org/
- Open Course Library: http://opencourselibrary.org/
- Open Education Week: https://www.openeducationweek.org/
- Open for Learning Challenges: http://openlearning.ubc.ca/
- Open Textbook Summit: https://open.bccampus.ca/open-textbook-summit/
- Pressbooks: https://pressbooks.bccampus.ca/
- Pressbooks Webinar Recordings: https://opentextbc.ca/pressbooks/chapter/webinar-recordings/
- Pressbooks Training PowerPoint Slides: https://opentextbc.ca/pressbooks/chapter/webinar-

powerpoint-slides/

- Pressbooks Video Tutorial Series: https://opentextbc.ca/pressbooks/chapter/pressbooks-tutorial-videos/
- Scholarly publishing: https://www.lib.sfu.ca/help/publish/scholarly-publishing/33758
- Sprint to develop a psychology test bank: https://open.bccampus.ca/2014/07/03/book-sprint/
- Sprints: https://en.wikipedia.org/wiki/Sprint_(software_development)
- Tension in open scholarship: https://bccampus.ca/2017/10/23/open-access-week-events-workshops-and-webinars-in-b-c/
- UBC Open Data Collection: https://open.library.ubc.ca/collections/abacusopen

16. Creating Resources

- BCIT Open Website: https://open.bcit.ca/
- B.C. Open Education Library Guides: https://bcoel.ca/bc-open-education-library-guides/
- B.C. Open Textbook Collection: https://open.bccampus.ca/find-open-textbooks/
- Creative Commons resources: https://search.creativecommons.org/
- Inventory of open practices: https://open.ubc.ca/projects/
- KPU Open Website: http://www.kpu.ca/open
- Open Education Report, 2018: https://open.bcit.ca/oer/islandora/object/oer%3A20
- OpenETC: https://opened.ca/
- Open Snapshots: https://open.ubc.ca/category/updates/open-snapshots/
- Submit an open resource or example of an open practice: https://open.ubc.ca/projects/add-your-project/
- UBC Open Website: http://open.ubc.ca/

Part 3: Sustain a Working Group

19. Evaluate

- Christina Hendricks at UBC: https://www.researchgate.net/scientific-contributions/2135396649_Christina_Hendricks
- Community of librarians supporting OER [PDF]: https://bccampus.ca/files/2016/04/DLS-Conference.pdf
- Environmental scan of OER [PDF]: https://www.ams.ubc.ca/wp-content/uploads/2018/09/Open-Educational-Resources-at-UBC.pdf
- Georg Rieger at UBC: https://www.researchgate.net/scientific-contributions/34117688_Georg_W_Rieger

- Gill Green at UBCO: https://www.researchgate.net/profile/Arthur_Green
- Rajiv Jhangiani at KPU: https://www.researchgate.net/scientific-contributions/2095559188_Rajiv_S_Jhangiani

20. Communicate

- BCIT Open Education Report from 2018: https://open.bcit.ca/oer/islandora/object/oer%3A20
- Hanging with a Pack – the Power of the Group in Creating Community: https://wiki.ubc.ca/Documentation:Open_UBC/Open_for_Learning/Presentations#Hanging_with_the_Pack_-_The_Power_of_the_Group_in_Creating_an_Open_Community
- Infographic example from the UBC Flipped Lab Network [Image file]: http://flippedlab.sites.olt.ubc.ca/files/2014/08/infographic_final_A3size-01-3.png

Appendixes

Appendix 1: A Sprint Toolkit

- Agile project management: https://en.wikipedia.org/wiki/Agile_management
- British Columbia in a Global Context textbook sprint: https://bccampus.ca/2014/06/20/how-to-turn-a-great-idea-into-an-open-textbook-in-just-four-days/
- Hackathons: https://en.wikipedia.org/wiki/Hackathon or https://events.ctlt.ubc.ca/events/learning-analytics-open-data-hackathon-3-0/
- How to Conduct Paper Sprints [PDF]: https://sph.umich.edu/cehr/pdf/Paper_Sprint_Manual.pdf
- OER Sprint New Zealand: http://oersprint.nz/learn-more/
- Open Case Studies sprint: http://blogs.ubc.ca/chendricks/2016/06/16/open-case-studies-sprint/
- Open Science course sprint: https://creativecommons.org/2013/02/11/open-science-course-sprint-an-education-hackathon-for-open-data-day/
- Scrum: https://www.scrumalliance.org/why-scrum
- Sprints: https://en.wikipedia.org/wiki/Sprint_(software_development)

Appendix 2: Plan the Sprint

- Beta-Etherpad: https://beta.etherpad.org/
- Documentation on sprint roles: https://wiki.ubc.ca/Documentation:Open_Case_Studies/Sprint/Toolkit_Roles
- Etherpad: http://etherpad.org/
- Google Documents: https://www.google.ca/docs/about/

- Hypothesis: https://web.hypothes.is/
- Intro to Design Thinking [PDF]: https://dschool-old.stanford.edu/sandbox/groups/k12/wiki/c739e/attachments/2e9b3/An%20Intro%20to%20Design%20Thinking.pdf?sessionID=8cbdfc6129ceb041dbad2247ffc9d0112fd0ebce
- MediaWiki: https://www.mediawiki.org/wiki/MediaWiki
- Pressbooks: https://pressbooks.com/
- WordPress: https://wordpress.org/

Appendix 3: Prepare for the Sprint

- Creative Commons Search: https://ccsearch.creativecommons.org/
- Creative Commons search page: https://search.creativecommons.org/
- The Noun Project: https://thenounproject.com/
- UBC Library Open Resource Portal: http://guides.library.ubc.ca/open_education
- Wikimedia Commons: https://commons.wikimedia.org/wiki/Main_Page

Appendix 4: Set Up the Sprint

- APA Style: http://www.apastyle.org/
- Canadian Press Stylebook: http://www.thecanadianpress.com/books.aspx?id=182
- The Chicago Manual of Style Online: http://www.chicagomanualofstyle.org/home.html
- Example of a style guide: https://opentextbc.ca/selfpublishguide/back-matter/appendix-2/
- Kanban board: https://en.wikipedia.org/wiki/Kanban_board
- MediaWiki template for the case study writing: https://wiki.ubc.ca/Documentation:Open_Case_Studies/Geography/Template
- MLA Style Manual: https://style.mla.org/

Appendix 5: Deliver the Sprint

- Dot voting: http://www.kstoolkit.org/DotVoting

Appendix 7: Open Technology

- Create a new site from WordPress templates: https://opened.ca/wp-signup.php
- Hosted within British Columbia: https://www.bc.net/service-catalogue/educloud-server
- Mattermost: https://mattermost.org/
- OpenETC: https://opened.ca/

- Open ETC Sandstorm server: https://oet.sandcats.io/
- Open web: https://en.wikipedia.org/wiki/Open_Web
- Pressbooks: https://pressbooks.bccampus.ca/

Versioning History

- Report an Open Textbook error: https://open.bccampus.ca/reporting-an-open-textbook-error/

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Versioning History

This page provides a record of changes made to this guide. Each set of edits is acknowledged with a 0.01 increase in the version number. The exported files for this toolkit reflect the most recent version.

If you find an error in this guide, please fill out the Report an Open Textbook Error form.

Version	Date	Change
1.0	March 7, 2019	Guide added to the B.C. Open Textbook Collection
1.01	May 8, 2019	Add Appendix 8: Working Groups in B.C.
1.02	June 29, 2018	Changed from Open Textbook theme to Clarke theme.
1.03	October 1, 2019	ISBNs added: Print and eBook
1.04	November 17, 2020	New section added: Kanban and Project Management.
1.05	November 24, 2020	Added “20 Questions to Ask about Open Education” PDFs and link to searchable OE Strategy Database to Create an Inventory of Open chapter.