

Proposal: Re-scoping the CAUL OER Advocacy Project

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This paper provides a proposal for re-scoping the CAUL Open Educational Resources (OER) Advocacy. It outlines the key work packages and timelines for review and endorsement by the Board.

Overview of work to date

Key activities

To date, the project team has:

- Collected data on institutional and individual perspectives on OER through a survey of CAUL Member institutions, conducted collaboratively with the Open Educational Resources Collective Pilot and Open Educational Resources Professional Development Program.
- Completed a review of existing content for (re)use, revision, repurposing, and remixing, resulting in a curated collection of almost fifty assets that may be suitable for the toolkit.
- Consulted with key contacts:
 - Catherine Clark (University Librarian, Curtin University)
 - Professor Ginny Barbour (Director, OA Australasia)
 - Nicole Allen (Director, Open Education, SPARC)
 - Tanya Grosz (Director of Educational Programs, Open Education Network).

These critical contacts have agreed to ongoing discussions and feedback as the project progresses, and all have expressed keen interest in the outcomes.

Key findings

Content review

Australian content for OER Advocacy remains sparse, so the project team was reliant on identifying international resources. Organisations such as SPARC, and the Open Education Network have developed (primarily) US-based resources that can be repurposed. A feature of both organisations is the inclusion of user-generated and user-modified content to build resource banks based on lived experience and community buy-in. These often represent evergreen resource development ensuring relevant, current, and authentic content. However, a major finding from the team shows that many of the resources lack a mediating layer that explains the purpose and potential use of the content to readers - and this acts as a barrier to wider implementation.

Survey

The CAUL Survey revealed implications for this project, notably:

- Respondents were not always linked to discussions and meetings that allowed for timely OER advocacy; instead taking a more reactive role in content provision.
- Advocating for the use of OER to academic staff, and senior leaders were ranked in the top five as priority areas for professional learning.
- The most common activities in open education included authoring discipline directories for OER, implementing discovery solutions for OER via the library catalogue, and building awareness. The free-text responses indicated limited practice beyond these activities, a need for awareness-raising

(especially among academic staff and university leaders), and a desire for wider connections to good practice and programs across the sector.

There is an identified need for librarians to undertake strategic OER advocacy that recognises proactive library leadership in this space, and engages in practice beyond content curation. These findings reinforce the linkages between all three projects, and the need for inter-project-team meetings and information sharing throughout 2022.

Insights from the consultation process

Resources

- The required resources should range from practical and granular (for example communications templates, slide decks) to broader guidance (such as establishing a grants program). Saving the time of advocates should be a driver. One example is to provide a slide deck drawing on research data and findings that can be customised (and localised) that can be easily reused for presentations.
- The freedom to tailor content to audiences is an essential affordance of advocacy resources. Resources should be openly licenced wherever possible. Furthermore, resources should be created to support targeted messaging. For example, advocates may seek to build a communication strategy based on resource accessibility aligned with their current institutional priorities and should reasonably expect to find resources to support this messaging.

Community-building

- Encouraging advocates to share localised resources and experiences is essential to growing Australian OEP. The project needs to consider how users may share content, and how the Toolkit will be supported post-project.
- Advocates of OEP tend toward feelings of isolation due to the emergent nature of the practice. Building a sense of community and support is critical to advocacy network success, and shares a common pool of normalised experience.

Creating traction for OER

Link OER to OA publishing. Academic staff are aware of OA publishing and priorities and this affords a method to bridge concepts, and secure wider commitment to open educational practices.

Proposed revised project scope

Objectives

The original project objectives were:

- Raise the visibility of the OER agenda for key stakeholder groups, particularly DVCsA and government.
- Develop and enact a plan for advocacy related to OERs that targets DVCsA and government.
- Curate and/or create resources to support advocacy work.

In consultation with the Program Director and the Director, Strategy & Analytics, the Project Team have revised the objectives and propose the following revised objectives:

- Develop an advocacy toolkit, including curation and/or creation of resources to support practitioner OER advocacy work.
- Design and deliver an advocacy planning workshop for delivery at the CAUL Conference.
- Undertake a stakeholder mapping activity to inform future strategic OER advocacy work.

The revised project will deliver three work packages:

- Work package 1: Develop OER Advocacy Toolkit (Objective 1)
- Work package 2: Undertake stakeholder mapping activity (Objective 2)
- Work package 3: Plan and deliver an advocacy planning workshop at the CAUL Conference.

Proposed work packages

Work package 1: OER Advocacy Toolkit

The OER Advocacy Toolkit is a website based on the structure and format of the Open Research Toolkit. It is designed as a focal point for emerging and established librarian-advocates, providing an overview, reusable resources, and opportunities to disseminate and link good practice across the sector. The target audience ranges from those undertaking advocacy activities with less depth of knowledge in OEP, though to those with an established record of open activities seeking to scale to whole-of-institution levels. The Access Pathways (detailed below) will allow flexible interaction with content and provide use cases in context.

The design and development principles are:

- Users can access content in both a structured, and self-guided mode allowing for a mixture of needs and preferences
- Content is available in a range of formats to suit varied audiences and communication channels
- Wherever possible, content follows accessibility guidelines
- All content is openly licenced to permit reuse and sharing
- Where possible, follow similar development outcomes to the OA Publishing Toolkit. This will conceptually and visually link OA and OEP reinforcing the connectedness of these practices.

Users can retrieve content from the site via two Access Pathways:

- Access Pathway #1: Scenario-driven. A number of scenarios have been developed using commonly-cited experiences, and endorsed through discussions with our critical contacts. The scenario will present a scaffolded outline for the librarian-advocate that includes linked resources, and video interviews with staff who have conducted similar activities. Downloading the collection of scenario resources will create a focused toolkit to support local advocacy.
- Access Pathway #2: User-driven. All on-site resources will be categorised based on advocacy messaging (such as advocating based on affordability, or advocating for the use of open texts) allowing users to search for, and construct, individualised toolkits for use and download.

Work package 2: Stakeholder mapping

The second Work Package shifts focus to the key stakeholder groups aligned with open education nationally. The intended outputs will be (a) a document listing all these organisations identifying key contacts and a rationale for their inclusion, and (b) focused messaging to be used to interact with these organisations.

Work package 3: Advocacy planning workshop

The team will develop and deliver an OER advocacy workshop at the CAUL Conference in 2022. Participants will be introduced to the toolkit (launched at the conference) and create a first draft of an OER Advocacy Action Plan to be implemented at their institution, or to inform OEP discussions locally. It is expected the immediate practicality of the offering, coupled with the toolkit launch will generate significant sector-wide interest.

Project timeline

A detailed timeline for the re-scoped OER Advocacy Project is available at Appendix 1.

Risk Management Matrix

A risk management matrix for the OER Collective Pilot Project is provided at Appendix 2.

Recommendation

It is recommended that the Board endorses the revised project scope, including project objectives and work packages.

Appendix 1: Project Timeline

Phase	Work package	Start date	End date	Activity or body of work	Associated output/s	Responsibility
Planning				Write draft project update paper	Draft Board paper	Adrian Stagg
		10/12/2021	19/01/2021	Revise draft project update paper	Draft Board paper	Adrian Stagg
			19/01/2021	Submit draft project update paper to the Board	Board paper	Adrian Stagg
Execution	WP1 Toolkit	24/01/2022	07/02/2022	Finalise scenarios <ul style="list-style-type: none"> Seek critical friend feedback on scenarios Revise scenarios 	Scenarios	
	WP1 Toolkit	24/01/2022	14/02/2022	Develop Toolkit topic list <ul style="list-style-type: none"> Develop a list of topics the Toolkit will address. Conduct a targeted, rapid response survey to socialise proposed topics list (participants: OER Collective and OER PD project teams; OER Collective Library Staff CoP; ASCILITE OEP SIG). Refine topic list based on survey. 	Topic list	
	WP1 Toolkit	14/02/2022	28/02/2022	Develop information architecture for the Toolkit The IA will articulate two navigation pathways through the content - one scenario based, and one topic based.	Information architecture diagram	
		24/01/2022	14/02/2022	Identify content requirements Develop a draft list of content required for the Toolkit. The content list will address the content required for the two scenarios as well as additional content required to address key topic areas.	Content list that identifies where the content sits in both navigation pathways (scenarios and topics)	
	WP1 Toolkit	24/01/2022	07/02/2022	Develop style guide Develop a style guide for the Toolkit to ensure consistency, based on the OER Collective Resources Style Guide .	Style guide	
	WP1 Toolkit	14/02/2022	28/02/2022	Plan content development <ul style="list-style-type: none"> Map existing content identified during the initial stages of the project to the content requirements list. Identify gaps where content needs to be created. Allocate sections of the Toolkit to pairs of team members to adapt or create content. 	Content list annotated to indicate <ul style="list-style-type: none"> where content already exists and whether it can be reused, linked to or adapted who is responsible for developing the content. 	

WP1 Toolkit	28/02/2022	11/04/2022	Develop content Team members develop assigned content - curating or adapting existing content and creating content where needed. Team members work in pairs on content.	Draft Toolkit content	
WP1 Toolkit	11/04/2022	25/04/2022	Review content <ul style="list-style-type: none"> • Team members review and provide feedback on the content developed by each pair. • Editorial review undertaken by one team member to ensure consistency. 		
WP1 Toolkit	25/04/2022	09/05/2022	Finalise content Content author pairs review and integrate peers' feedback and finalise their allocated content.	Final Toolkit content	
WP1 Toolkit	11/04/2022	25/04/2022	Set up LibGuides shell		Director, Strategy & Analytics Engagement & Administration Officer
WP1 Toolkit	11/04/2022	25/04/2022	Run LibGuides training		Director, Strategy & Analytics Website sub-team
WP1 Toolkit	25/04/2022	23/05/2022	Build Toolkit Project team put Toolkit content into LibGuides.	Draft Toolkit in LibGuides	Website sub-team with support from Engagement & Administration Officer
WP3 Conference workshop	25/04/2022	13/06/2022	Plan workshop Plan the workshop <i>Developing an Advocacy Action Plan</i> to be delivered at the CAUL Conference.	Workshop plan and resources	Workshop sub-team
WP1 Toolkit	30/05/2022	13/06/2022	Critical friend review Send Toolkit to critical friends for review and feedback.	Feedback from critical friends	Website sub-team
WP1 Toolkit	30/05/2022	13/06/2022 <i>This can be done while the Toolkit is out for review</i>	Develop communication plan and materials Develop a plan for promoting the Toolkit.	<ul style="list-style-type: none"> • Twitter schedule including tweet text • Graphics to use on social media • Launch blog post for Enabling a Modern Curriculum blog 	Communication sub-team

					<ul style="list-style-type: none"> Article for CAUL newsletter Email announcing the Toolkit for Council elist 	
	WP1 Toolkit	20/06/2022	11/07/2022	Integrate feedback Review feedback and decide what feedback to action.	Action list	
	WP1 Toolkit	20/06/2022	11/07/2022	Finalise Toolkit Make revisions to content in LibGuides and finalise Toolkit.	Final Toolkit	Website sub-team
	WP2 Stakeholder mapping	20/06/2022	11/07/2022 <i>Can be done while revisions are made to the Toolkit</i>	Undertake stakeholder mapping <ul style="list-style-type: none"> Map key stakeholders including academics who are active in the OER space, professional bodies, government departments, and universities who are leading in the OER space across Australia. Identify key messages that would be helpful to engage stakeholders. 	Stakeholder matrix	Stakeholder mapping sub-team
	WP1 Toolkit	05/09/2022	First week of September 2022	Launch Toolkit <ul style="list-style-type: none"> Launch and demonstrate Toolkit at the CAUL Conference (session at one of the online days). Begin social media campaign (week after the CAUL Conference). 		
	WP3 Conference workshop	12/09/2022	Second week of September 2022	Deliver <i>Developing an Advocacy Action Plan</i> workshop at CAUL Conference		
	WP1 Toolkit	19/09/2022	17/10/2022	Develop maintenance and update strategy Develop a plan for maintaining and updating the Toolkit.		
Closure		03/10/2022	26/10/2022	Draft project closure report Include plan for maintaining and updating the Toolkit and recommendations for next steps for OER advocacy.		
			02/11/2022	Submit project closure report to the Board		

Appendix 2: Risk Management Matrix

Risk	Likelihood	Impact	Mitigation strategies
Inadequate resources available for the project	2	4	<ul style="list-style-type: none"> Keep inventory of and share collective resources - technology, personnel, networks and connections with stakeholders
Cost of time commitment of project team members	4	3	<ul style="list-style-type: none"> Use working groups to focus efforts on specific tasks Maximise benefits to member libraries through team members' skills development, knowledge sharing and networking opportunities
Inadequate resources found from environmental scan that team can reuse, leading to increased workload	2	4	<ul style="list-style-type: none"> Use working groups to focus efforts on specific tasks Maximise benefits to member libraries through team members' skills development, knowledge sharing and networking opportunities
Insufficient analysis of the motivations/drivers/incentives for stakeholders to engage with our advocacy	3	5	<p>Perform stakeholder analysis:</p> <ul style="list-style-type: none"> Who are they? What drives and motivates them? What are their key priorities? Where does our advocacy align with their key interests?
Cost of time commitment of stakeholders	3	3	<ul style="list-style-type: none"> In stakeholder analysis (above), identify key pain points for stakeholders' engagement with the Advocacy project and focus activities on addressing these
Lack of interest from target audiences for advocacy activities	2	5	<ul style="list-style-type: none"> In stakeholder analysis (above), identify broad range of target audiences and perform stakeholder analysis (as set out below) prior to engaging with stakeholders
Redundancy of the toolkit over time	4	4	<ul style="list-style-type: none"> Seek an existing community or establish a group who will take on stewardship and ongoing maintenance of the toolkit
Scope creep due to insufficient clarity on the specific meaning of "advocacy"	3	4	<ul style="list-style-type: none"> Pin down and articulate what advocacy means specifically for this project Develop a shared clear definition in written form
Miscommunication resulting in reputational or relationship damage	3	5	<ul style="list-style-type: none"> Write up a table identifying key areas where miscommunication or unanswered concerns could occur, and diplomatic evidence-based ways of addressing them, <i>e.g. concerns about quality of OER, concerns about academics being unwillingly forced into changes, etc</i> Ensure that experienced communicators are chosen for contacting key bodies like Universities Australia and DVCsA Engage local University Librarians/Executive Directors as first port of call to reach senior

			<p>university staff in a way that is sensitive to local contexts & nuances</p> <ul style="list-style-type: none">• Brief our communicators appropriately and concisely ahead of key conversations
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Scales

Likelihood scale

1. Rare
2. Unlikely
3. Possible
4. Likely
5. Almost certain

Impact scale

1. Insignificant
2. Minor
3. Moderate
4. Major
5. Critical