1.0 Introduction
The following is a brief report on the progress of the JISC-funded project on Open Educational Resources (OER). The project, called ‘Open Exeter’ runs for one year from 1st May 2009 to 30th April 2010.

Rather than print a swath of documentation, links to relevant material have been provided. It would be useful if these could be perused before the meeting.

2.0 Preliminary Outputs
The successful project bid is available at: http://people.exeter.ac.uk/tjb202/oer/Exeter-OER.pdf

As a condition of funding, a draft project plan had to be submitted to JISC by 29/5/2009. This will be reviewed by JISC and a final version submitted for ratification by 30/6/2009. This draft is available at: http://people.exeter.ac.uk/tjb202/oer/OpenExeter-v1_HWcomments.doc. A password is required to open the document. This will be supplied separately. This draft contains tracked comments from JISC, provided on 17/6/2009. In the covering email JISC said ‘Overall this is an excellent project plan’. As you will note, the requested changes are broadly clerical. It is anticipated that this document will form the basis of much of any discussion at the meeting.

3.0 Project Progress
The draft project plan places our project within relevant international and national contexts as well as related activity currently taking place at the University of Exeter. Then, in a variety of different contexts, it describes how the project will be conducted through 11 workpackages. There is both linearity and interdependence within them. The following provides a brief summary of work to date, within each workpackage.

3.1 Staff Recruitment (WP-0)
Anna Howell, Richard Holding and Ian Wellaway, Educational Technologists, have been seconded 50%FTE from SELL. They started on 20/5/2009. They will be playing a crucial role in many of the workpacks. Olivia Dunn, Project Administrator, has been recruited from DARO. She will also be 50%FTE and will start on 30/6/2009. Whilst waiting for her to arrive, we have been well supported on a limited basis by Liz Hegarty, currently a temporary administrator in Education Enhancement.

Furniture, PCs and software have all been provided for them within Education Enhancement, Laver Building, Level-7.
3.2 Project Management (WP-1)
To be undertaken by this Steering Group! Subject to his availability, the meetings will be chaired by Richard Lamming. In his absence, Alison Wride will deputise. The dates and venues for all the meetings have previously been circulated.

3.3 Review of Current Practice / Challenges (WP-2)
We need to understand more about our current working practices as part of the process of change. We need to ‘learn for ourselves’ in order to maximize institutional buy-in. Initially, this was thought to be a brief report, completed early within the life of the project. On reflection, it is thought that this can only adequately be completed much nearer the end of the project as we gain a rounded view regarding the cultural, procedural and technical challenges that academics in particular have encountered. The views of the Steering Group are eagerly sought.

3.4 Quality Validation (WP-3)
For reasons as outlined in the Project Plan, we will initially employ a centralised model of evaluating quality. On reflection, it is proposed that we change the term ‘validation’ to ‘enhancement’. The proposed validation panel will need to authenticate the veracity of the resources in two particular ways. Firstly the materials that already form part of the project, after they have been stripped of any IPR-offending material need to be evaluated to determine if there is any coherence in what is left. Secondly, additional material has already been offered to the project. A view needs to be taken regarding how it could ‘enhance’ the Exeter profile.

The JISC Tender explicitly states that it is not seeking newly created material for the project. Nevertheless, we have already encountered circumstances where contributors are willing to re-purpose their material, removing IPR-offending material and replacing it with compliant material. The extent to which this may be necessary or indeed the extent to which a contributor is prepared to do this will be one of the challenges to be addressed.

This evaluation panel has yet to meet but neither does it have any immediate business to attend to. Or does it? Should we formally approve, prior to IPR clearance, the material that has been accepted as part of our successful bid to ensure it reflects well on the Exeter ‘brand’? Comments please.

Broadly, the membership is very similar to that of the Steering Group. Should the activities of the two groups be combined? Should the membership of the enhancement panel be much smaller and tighter focused? Comments please.

3.5 Identification of Material’s Provenance (WP-4)
To enable contributors to assess the provenance of the material they are offering, a template is currently being produced and is being written in such a way as to allow the author of the materials to annotate them prior to passing on for formal clearance. Meanwhile, in order to get started early, the educational technologists are working closely with several contributors to assist them in marking up their material.

3.6 Licensing & Clearing (WP-5)
Starting initially with some modules from DLL, we are actively interrogating the material for IPR issues. In addition to the contributor’s own assessment (see WP-4) we are experimenting with using Turnitin as an additional form of assistance. N.B. we are NOT retaining the material on the database!

IPR issues are many and complex and so we have created a number of filters through which questions are passed. When they become too intractable for the core team (Tom Browne, Matt Newcombe, Anna Howell, Richard Holding and Ian Wellaway) they are passed to Rachael Morgan, in the University’s Legal Team. Should she then also need
assistance, she has access to Eversheds, the University lawyers. All these thresholds have already been tested and have worked well. By such means, we are confident that we will always be covered by ‘due diligence’.

We need to consider both ‘licence-in’ (the terms under which a contributor gives us material) as well as ‘licence out’ (the terms under which we allow others to use the material). Rachel Morgan is currently at an advanced stage of producing a Licence-In agreement. Meanwhile, in order to get started early, we have obtained acceptable informal assurances from several contributors that we can work on their material.

Several members of the project ‘attended’ online events – ‘Web-2-rights’, 4th June and Coping with Copyright - Considering Creative Commons - 24th June. Both have been organised by RSC-South-West.

3.7 Interoperability (WP-6)
Since the concept of OER builds on the idea of reusing and repurposing materials, interoperability is vital. WP-6 is closely aligned with WP-7 and WP-8. Currently, no work has needed to be undertaken explicitly for WP-6.

3.8 Metadata (WP-7)
We must add good quality metadata to enable users to find the most relevant resources for their needs. Much time has already been spent deliberating on achieving the best balance between a very comprehensive schema, but which may frighten depositors away, and a very simple one, which may mean the material is difficult to find by search engines. Our current approach is to define a schema that only requires information that should already be available within a module descriptor. Tom has stimulated what has become a somewhat vibrant blog thread! (see WP-10)

Parallel deliberations are focusing around what ‘standard’ we use. DSpace (see WP-8) comes with Dublin Core. Whilst this is satisfactory for e.g. digital artifacts, it is not thought to be most suitable for learning objects. We are therefore currently mapping to a more international standard called Learning Object Metadata Core (LOM). This mapping will be undertaken by colleagues in BISS, Academic Services and the detailed discussions regarding complying with the timetable in the workplan in our project plan have recently been satisfactorily conducted.

3.9 Delivery Platforms (WP-8)
We are required to deposit our resources into JorumOpen, a new OER service established by JISC. But as outlined in the text for WP-6 and WP-7 we are also depositing our material in a dedicated repository in-house. The rationale for this is outlined in the Project Plan but there does exist some potential for conflicts between the two repositories.

This infrastructure requirements for our repository (Open Exeter) will be set up by colleagues within Information & Computing Systems, Academic Services, and the detailed discussions regarding complying with the timetable in the workplan in our project plan have recently been satisfactorily conducted.

The University now has a number of repositories using DSpace. A major issue to resolve is whether it would be better to have distinctly separate DSpace installations or just one, but with the latter being able to handle multiple entry points, with distinct URLs etc. On balance, we think we will pursue the former model. One particular advantage is that we think it will enable us to specify the material to greater degrees of granularity, should we wish to do so. Comments are greatly welcome.
3.10 Tracking (WP-9)
We are required to track the usage of our OER but it is also important that we understand what users value about our resources (content, tools, services) to ensure we create a community not just of consumers but also of co-creators. We are working collaboratively with Professor Grainne Conole (Open University), using their CloudWorks tool as a value-added tracking ‘wrapper’ around an OER, thereby creating a social network of engaged users around particular artifacts using e.g. twitter!. Grainne has already delivered two workshops at Exeter. She has also recently obtained additional funding from another source, thereby enabling her to work with us in an even closer way than we had originally anticipated.

The use of OER challenges established educational practices so Staff Development colleagues within Education Enhancement attended both CloudWorks workshops. Also, negotiations are at an advanced stage to employ Helen Beetham, a freelance consultant, who has assisted us in other related capacities, to provide some workshops for our Staff Developers, to enable them to enhance e.g. the LTHE and PCAP courses. The workshops will probably take place in early Spring 2010.

3.11 Training Materials/Dissemination (WP-10)
The project website (http://projects.exeter.ac.uk/oer/index.htm) and project blog (http://blogs.exeter.ac.uk/oer/) are now both established. Everyone named within the bid has been set up to be able to initiate a new blog thread and of course you are all encouraged to contribute actively to existing threads. The minutes from this meeting will be placed on our website, thereby contributing to the overall dissemination. Anna Howell, Richard Holding and Ian Wellaway are collectively producing a weekly blog on progress, issues arising etc.

The core team are maintaining an online tracking of all activities, with associated responsibilities and deadlines. We thereby have an audit trail to deliver to JISC when required.

3.12 Ongoing and final evaluation (WP-11)
The contributions from the Steering Group form an essential component of ongoing evaluation of the project.

There are broadly two projects themes, though they are closely coupled. One project is to ‘tell the story’. JISC are very keen to learn from our experiences. It is therefore essential that we capture our story as it occurs. This is why we have placed much emphasis on the blog and other outlets being contemporaneous with the activities they reflect. The other story is to deliver a minimum of 360 credits of material. There is some ambiguity regarding whether we have to offer a minimum of 360 credits as part of the bid, or, after all IPR issues etc have been dealt with, a minimum of 360 credits remain. Our ambition is to achieve the latter.

4.0 Other Activities
A suite of other activities have also taken place:

4.1 Induction Sessions These have taken place, primarily for Anna, Ian and Richard, when they were newly arrived to the project.

1. **Overview of project** – Tom and Matt (Education Enhancement, Academic Services). Using a mature draft of the Project Plan, we conceptualized an overview of the whole project by a ‘walk-through’ of all the workpackages, in order to clarify the separate and related work flows.

2. **Metadata** Ahmed Abu-Zayed (Digitisation and Metadata Workflow Manager, Collections and Research Support, Academic Services) gave an overview of our DSpace repository together with Dublin Core and LOM.
3. **Legal Issues** Rachael Morgan (IP Manager, Research & Knowledge Transfer, Enterprise Development Office; Communication Services) and Paul Hurst (Insurance Controller, Finance Services) gave an overview of the legal and liability issues. These sessions had the additional benefit of bringing together disparate people from different parts of the University around our common objective.

4.2 **Regular progress meetings** : Matt and Tom meet with Anna, Ian and Richard every Tuesday a.m. to take stock of progress and to plan ahead.

4.3 **Presentations**
   1. 5th June 2009 – Sue Burkill gave a presentation to SMT on a suite of related projects, in which she outlined the synergies between the OER project and other projects being undertaken within Education Enhancement.
   2. 9th June 2009 – Matt and Tom attended the Open Educational Resources Programme Start-up Meeting in London. This was a joint meeting hosted by JISC and the HEA. Tom gave a brief presentation on Open Exeter.

5.0 **Budget**
We requested and have obtained nearly £250k. We will obtain this sum in four quarterly amounts. It is received by Research Accounting, who administer it. The budget is categorized as outlined in [http://people.exeter.ac.uk/tjb202/oer/oer-budget.xls](http://people.exeter.ac.uk/tjb202/oer/oer-budget.xls). A password is required to open the document. This will be supplied separately. To date, apart from salaries for the three educational technologists, the major expenditure has been for their computer equipment.

6.0 **In Conclusion**
Overall we are making very good progress, and we have not (yet) encountered any insuperable problems. The more intractable issues, namely those around the cultural challenges that OER may present are more likely to surface after the completion of the project funding. A valuable role for the Steering Group would be to contribute to the future positioning of this debate and most particularly the sustainability of OER as part of enhancing the reputational impact of the University.

Comments please.

Tom Browne,
Education Enhancement, Academic Services