

# A Project Management Template for OER Projects

*Cynthia Ippoliti, Director, Auraria Library: University of Colorado, Denver; Metropolitan State University of Denver, Community College of Denver, cynthia.ippoliti@ucdenver.edu*

*Kathy Essmiller, Open Educational Resources Librarian, Oklahoma State University, kathy.essmiller@okstate.edu*

*Matt Upson, Associate Dean for Research and Learning Services, Oklahoma State University, matthew.upson@okstate.edu*

## NUTRITION INFORMATION

Supporting open education projects is a complicated task due to the many variables and stakeholders that typically participate in these initiatives. This recipe provides a project outcome template that allows readers to initiate and manage an OER project from start to finish and offers tips for collaborating and setting deadlines and criteria for faculty, students, and other colleagues whom they do not supervise.

## PROJECT OUTCOMES

This recipe will have these outcomes:

- Outline a solid planning template in order to initiate, coordinate, and measure the success of an OER project.
- Define strategies for dealing with multiple stakeholders involved in a complex set of relationships and activities over time.
- Offer recommendations for how to balance conflicting perspectives, needs, and timelines in order to accomplish project goals.

## NUMBER SERVED

Project teams can range from 3–5 core members with varied numbers, depending on

the scope of the project and the size of the classes in which it is implemented. Projects can range from 5–7 per academic year, also depending on the number of faculty cohorts or groups that you are working with.

## COOKING TIME

Set realistic timelines and ensure that everyone sticks to them by offering regular meetings and check-ins, and celebrate each smaller step completed along the way to sustain momentum.

When considering potential future adoption of an OER for a course, set realistic expectations about how fast this can happen. Not only does it take instructors time to author the OER, but they will also likely be restructuring a course, rethinking their pedagogical approach, and, often, departmental or college committees can be involved in the textbook approval process for larger or required courses.

## DIETARY GUIDELINES

This recipe provides a practical application of project management strategies to OER projects that might not easily lend themselves to “typical” approaches due to the often amor-

phous and fluid nature of this work which spans curricular, social, and critical boundaries and engages stakeholders in a way that typical project management does not.

## INGREDIENTS & EQUIPMENT

- What do you want your project to accomplish, what problem(s) are you trying to solve, and what are your priorities? All three modalities of OER work (adoption, adaption, and creation) start with changes to the pedagogy and the curriculum and then content development becomes increasingly complex when moving from adoption to creation.
- Understanding how each level becomes more time-consuming and complicated is crucial in defining how much time and how many resources are available.
- In addition, it’s important to think about what additional collateral materials will accompany the resource and whether anything is already available or not. It’s easy to lean toward providing comprehensive information and content, but is that really the best option given the goals and scope of the project?

**PREPARATION**

- Buy-in from your boss. These champions don't need to be the experts. They need to be the connectors who "(1) [occupy] a key linking position in their organization, (2) [possess] analytical and intuitive skills in understanding various individuals' aspirations, and (3) [demonstrate] well-honed interpersonal and negotiating skills in working with other people in their organization" (Rogers, 2003, p. 415).
- Partner recruitment strategy. Asking for faculty and student time is challenging! Think about what you can do to make the experience as enticing as possible. Often, these may be financial compensation and course release time (for faculty), but are there additional incentives the library can offer, perhaps for students and adjuncts who might be interested in developing OER? Being mindful especially of student and adjunct time and constraints is important as we should not rely on "free" labor from those who are not in a position to voice their limitations if they are not getting course credit, financial compensation, or some other type of tangible benefit.
- Marketing the initiative. Establish your outreach goals and determine how you will measure success. If you want to raise awareness, how will you know that more people know about the program? Through social media, increased inquiries, etc.? Plan your core messages, audiences, and communication channels.
- Roles, responsibilities, and communication. A memorandum of understanding (MOU) (see Iakovakis, Essmiller, & Upson, 2019) is critical to hold people accountable as this work often occurs alongside many other obligations. Even if authors are paid for their labor, the work can, in our experience, often be dismissed or deprioritized when schedules get busy.
- Stakeholder needs (dependant on whether faculty are adopting, adapting, or creating new content).
  - Collaboration, in which a group of participants works together with shared decision-making and multi-directional information exchange. In this instance, the library is deeply involved with the project and the librarian is a full member of the team as a consultant (see below) or a partner in either identifying content and resources or creating the content itself. Here too is where student roles can be outlined and implemented.
  - Consultation, in which faculty seek assistance from an expert who advises on a limited basis. This is one of the roles librarians can fulfill—to assist faculty in identifying OER resources, platforms, and offering assistance on open pedagogy best practices or publishing workflows.
  - Transaction, in which parties offer payment, frequently monetary, to have a component of their research done for them. This could happen in the instance of copyediting services, for example, where you are contracting with an individual or company to do this work for the project.
- Communication strategies will change over time as the project evolves. Conflict will most likely arise earlier in the project as workflows, roles, etc. are being defined and negotiated, so you will need to expect and plan for frank conversations about how the team is functioning overall—perhaps as much as you discuss the work itself. Consider each team member's ideas as valuable, establish team values and goals, and determine what you want to achieve and how decisions will be made.
- Infrastructure decisions, OER platforms, etc. This will really depend on the project in question and if you are building a text or other resource from scratch or not. There may be other tools available, such as your local institutional repository or an open source platform, but understanding issues such as training and sustainability after the project is over will also need to be considered. Be sure to consider and plan for how the content will continue to be updated long after the initial publication.
- Budget requirements. Funding levels will also vary depending on the scope of the project. Some libraries have successfully built OER development funds into their annual budget, but many also must rely on the generosity of donors or one-time grants. Be aware that paying individuals may result in additional taxes being taken from the overall amount.

Payment might also take the form of professional development funds rather than a stipend and you will want to track one-time versus ongoing costs.

### COOKING METHOD

- 1. Feedback and support.** Designate a corresponding author and librarian to represent each group in communication and use tools and methods already familiar to the authors. As the subject matter experts, the authors should provide content and format feedback while librarians can focus on providing structure and logistical support. In all cases (adoption/adaption/creation), instructional designers will be vital contributors to the development of the pedagogical approaches/methods and should either frequently be consulted or included as team members from the beginning of the project. With adaption and adoption, librarians will provide guidance on where to find appropriate textbooks or resources to be integrated into course content. In the case of creation, feedback to the authors involves necessary file types, copyright permissions, the publishing platform, accessibility, and copyediting. Plan from the beginning to set a calendar that features opportunities for checking in as well as an end date for the project that is workable for all parties to assist in setting deadlines and deliverables.
- 2. Reflection and assessment along the way.** Work with authors on ways they and their students can reflect on the

OER development and implementation process. Develop a survey (or adapt an existing one; see the Open Education Group's research toolkit) that provides opportunities for instructors and students to share how they used a resource. Faculty may also wish to conduct an assessment that depends on how the OER was integrated into the course and if they used an open pedagogical approach or not. Ideally, students will be part of all these processes and can assist with content creation as well as evaluation activities. Consider opportunities to expand a productive collaboration by planning for a formal research study alongside the author.

- 3. Debriefing and sharing the story.** At the end of the project, determine whether the project met the intended goals. What were the accomplishments and the challenges? What were the lessons learned? Authors should provide a short reflection on how this resource and accompanying materials, such as a teaching plan, assessment tools, and results, will be updated, preserved, and made accessible. We have found that allowing authors some flexibility in how they report back encourages follow-through. What story might this project tell and how can it be shared with others? This can be accomplished via video testimonials, establishing or updating a website, and developing additional marketing materials that highlight success stories. This is also a great opportunity for an Open Education Week event.

### ALLERGY WARNING

Interested authors may approach you because they've heard about OER from a colleague or student, or perhaps they are already well-versed on the topic and just need technical support. It is important to determine where the prospective author stands in terms of their awareness of what OER are and how related concepts and tools (like Creative Commons) play into the process of creating a resource. You will find it beneficial to sit down with your author(s) and not only determine how your goals for a project might overlap but also determine how much support they will need to get up to speed on OER.

### CHEF'S NOTES

If there is a grant or other type of funding involved, these deadlines are fairly strict, so understanding the scope of the project is critical so that you can work backward from the deadline in question to make sure the work will get done in time and so that you can build a cushion whenever possible to deal with unexpected challenges, such as a change in technology, a team member dropping out, or someone who is not participating to the fullest extent.

### ADDITIONAL RESOURCES

Battilana, J., & Casciaro, T. (2013, July 1). The network secrets of great change agents. *Harvard Business Review*, July–August 2013. Retrieved from <https://hbr.org/2013/07/the-network-secrets-of-great-change-agents>

BC campus open education adoption guide. (n.d.). Retrieved May 27, 2020, from <https://opentextbc.ca/adoptopentextbook/>

BC campus open education create textbooks. (n.d.). Retrieved May 27, 2020, from <https://open.bccampus.ca/create-open-textbooks/>

Ermolaev, N., Munson, R., & Li, X. (2018). *Design for digital humanities project management*. Retrieved from [https://cdh.princeton.edu/media/uploads/documents/cdh\\_dh2018\\_pm\\_design\\_presentation.pdf](https://cdh.princeton.edu/media/uploads/documents/cdh_dh2018_pm_design_presentation.pdf)

Iakovakis, C., Essmiller, K., & Upson, M. (2019). *Memorandum of understanding template for open educational resources (OER) projects*. Retrieved from <https://doi.org/10.6084/m9.figshare.10135043>

Open Education Group. (n.d.). *OER research toolkit*. Retrieved April 30, 2020, from <http://openedgroup.org/toolkit>

Rogers, E. M. (2003). *Diffusion of innovations* (5th ed). Free Press.

Schwarz, R. (2013). Eight behaviors for smarter teams. Retrieved from [https://cdn.csu.edu.au/\\_\\_data/assets/pdf\\_file/0008/917018/Eight-Behaviors-for-Smarter-Teams-2.pdf](https://cdn.csu.edu.au/__data/assets/pdf_file/0008/917018/Eight-Behaviors-for-Smarter-Teams-2.pdf)

Yale DHLab. (n.d.). *Project planning*. Retrieved April 30, 2020, from <https://dhlabs.yale.edu/guides/project-planning.html>