Guide of the OERup! pilot training
Conducted October 2015 – March 2016

Ines Kreitlein and OERup! Consortium

This guide has been designed by the OERup! consortium in order to provide information to anyone who is interested in implementing the OERup! training course with adult education learners. In the period of October 2015 to March 2016, OERup! tested its training material and curriculum in a pilot training phase. All activities and lessons-learned from the OERup! training pilot are summarized in this guide.
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Introduction

This guide has been designed by the OERup! consortium in order to provide information to anyone who is interested in implementing the OERup! training course with adult education learners. In the period of October 2015 to March 2016, OERup! tested its training material and curriculum in a pilot training phase.

All activities and lessons-learned from the OERup! training pilot are summarized in this guide.

1. General description

The OERup! training aims at fostering the implementation of open educational practices in adult learning. Within a blended-learning format, educational professionals as well as the staff and management of adult learning institution will be trained in reusing, revising, remixing, and redistributing open educational resources. Further, participants will engage in setting up strategies for open educational practices in their professional environment.

The training consists of online and offline elements. All participants will gain relevant background information on the topic through readings and tasks online, complemented with expert knowledge in forms of online seminars (webinars). Following the initial online learning phase, the training foresees the development of initial OER practices by the participants of in face to face workshops (in Stuttgart, Timisoara, and Leicester). The first steps of the implementation process of these practices will be accompanied by online coaching sessions.

The target group

of this training includes teachers, trainers, and mentors in adult learning, as well as the staff and management of adult education institutions, who...

- are interested in getting an overview of the topic OER and its potential for adult learning
- would like to be informed about the status quo of OER in Europe, its initiatives and communities
- are curious to find out more about and participate in the practice of Open Education
- want to learn how to develop OER and integrate OEP in their daily work
- are interested in developing sustainable strategies for OEP in adult learning
- are willing to share/discuss their experience with OER
- are interested in starting a new OER project

Previous experience in the use of OER is no criterion for admission. The training provides content for experienced learners as well as for those new to OER.
In terms of copyright
all resources of this training (module material, webinars, guidelines etc.) are licensed under the Creative Commons Attribution-ShareAlike 4.0 International License. To view a copy of this license, visit https://creativecommons.org/licenses/by-sa/4.0/

Technical requirements
Participants need:
● access to the internet (and corresponding hardware, e.g. laptop, computer etc.)
● access to the OERup! google+ community
● newest flashplayer and fast internet for access to Adobe Connect
● audio devices (headset)

Language
The training material was provided in English during the pilot training phase. Within the online community, all participants were allowed to post and discuss in their own language and just use the google translate options to understand each other. The training material is now available on www.oerup.eu in English, German, Romanian, Spanish, and Italian.

2. Aims and objectives
The aim of the pilot training was to provide actors of adult learning with an overview on the topic OER and to get them interested in finding out more about the potential of Open Education for their individual work environment.

On the one hand a group of European learners should be enabled to develop, find, use, reuse, and revise OER as well as integrating OEP into their daily work. On the other hand the training aimed to encourage them in sharing and discussing their experiences and questions concerning OER with each other.

By the end of the pilot training the participants should start to develop and engage in their own OER project. One important objective of the training was that learners engage in the Open Education community outside this training course and help shape this movement in the future.

What makes the OERup! training course worthwhile to attend?
1. excellent expert input from the adult education scene/ on adult education topics
2. opportunities to discuss and exchange ideas among peers (adult education actors)
3. the experience of how the open movement goes beyond national boundaries, and resources pass borders.
3. Content and competences

**Module 1**
*Getting to know OER and OEP*

- What do we understand by the terms in use?

*After having participated in the training, the learner will:*
be able to understand the terms in use (definitions and philosophy behind it)
be able to state his/her own motivation for producing and using OER

**Module 2**
*Open Licensing*

- What open licenses can be used and how should they be applied?

*After having participated in the training, the learner will:*
understand the main issues around copyright and licensing
and be able to apply the appropriate license to his/her OER
distinguish different types of licences and how they support OEP

**Module 3**
*OER – it’s already out there!*

- Where do we find good quality resources?
- How do we assess the quality of open resources?

*After having participated in the training, the learner will:*
know about OER repositories
be able to assess the quality of OER (in terms of format, media, adaptability, etc.)
be able to meaningfully repurpose OER
understand the implications of different licenses

**Module 4**
*OER – anyone can do it!*

- How do we create an open resource?
- What do we need to consider in making material accessible and reusable?

*After having participated in the training, the learner will:*
know what is needed in order to make OER findable
be able to apply the appropriate licence to his/her resource
know a range of tools and platforms that help him/her to produce OER
know how to design his/her OER so it can be readily used and adapted

**Module 5**
*OER in the classroom*

- What does open learning look like in practice?
- How can OER be included in my teaching and learning?

*After having participated in the training, the learner will:*
know how teaching practice should change around OER
know about the power of social learning
have increased its capacity to promote an OER policy in his/her institution

Module 6

OER as part of a strategy
✓ How can OER be an integral part of a sustainable business strategy?
✓ What opportunities and challenges do we need to be aware of?

After having participated in the training, the learner will:
know about benefits, risks, and costs of OEP (ROI)
fully understand the implication for their institution
know how to develop and deliver strategies to implement OER and OEP at institutional level
are able to engage in the first steps of developing an OER project
be able to evaluate the impact of OER on his or her work

4. Pilot Training Structure

The training consists of online and offline elements. All participants were provided with relevant background information on the topic through readings and tasks online, complemented with expert knowledge in forms of online seminars (webinars). Following the initial online learning phase, the training foresaw the development of initial OER practices by the participants of face to face workshops (in Stuttgart, Timisoara, and Leicester). The first steps of the implementation process of these practices, was accompanied by online coaching sessions.

In order to test the training as a whole, participants were asked to take part in all 3 steps:

1. online-learning / 2. face-to-face workshop (OER Jam) / 3. online coaching & peer exchange

Fig. 1: OERup! training phases

Those interested in the course but prevented from participating in the face to face workshops, were free at any time to access the learning platform and engage in the online learning part. The google+ community allowed them to follow-up on the developments of the OER projects being developed in Stuttgart, Timisoara, and Leicester.
Fig. 2: OERup! training schedule
Elements of virtual learning

Step 1a + 1b:

Readings and Activities
Each module provides reading material and videos to watch, and asks learners to follow certain activities. To work on their learning activities, learners were asked to choose the medium of their preference. In order to gain feedback to the work they have done, they could set a link in the forum.

Expert Webinars
Complementing the information found on the platform, experts provided their expertise to the topic, and were available for learners questions in 1h-online seminars. From November to December 2015, these webinars were scheduled weekly, from 13:30 to 14:30. All webinars were recorded and published on the platform for those not able to attend them live.

Webinar Agenda:
- Opening Webinar, 21.10.2015 / Expert: Alastair Clark
- Open Licensing, 04.11.2015 / Expert: John H. Weitzmann
- Quality Assurance in Open Education, 11.11.2015 / Expert: Anthony F. Camilleri
- Open Pedagogies, 25.11.2015 / Expert: Prof. Dr. Gráinne Conole

Forum Discussions
Learners could ask questions that arise and start discussions on interesting issues in the OERup! forum on the platform. Also the work they have done, following the different activities of the modules, could be shared and discussed there.

Online Learning Environment
As online learning environment the platform teachable.com was chosen by the consortium due to its usability for the learners as well as for the administrator. Following the feedback from the learners they also liked the layout and look and feel of the platform.

Virtual mentoring plan
The following mentoring plan, accompanies the virtual learning:
The mentoring plan is based on the following assumptions:
- the tasks for learners will not be assessed individually by the partnership but by peer-feedback, evidence based, or "automatic" answers only
- the partnership cannot provide a 24/7 service, in case questions about the content, the structure of the training, technical problems, etc. arise
- the partners are not all OER experts being able to give answers to all occurring questions, but could serve as first contact person and intermediary at best
- nevertheless learners should not be left alone during the pilote phase and the plan serves to ensure that the reaction to occurring questions is not left to chance.
- the task of mentoring learners should be divided by the whole partnership

<table>
<thead>
<tr>
<th>Module</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>OERup! Opening Webinar</td>
<td>19.10.</td>
<td>21.10.</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>OER + OEP 2! Open Licensing</td>
<td>19.10./</td>
<td>03.11.</td>
<td>04.11.</td>
<td>05.11.</td>
<td>23.10.</td>
</tr>
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<td></td>
<td>02.11.</td>
<td></td>
<td></td>
<td></td>
<td>30.10.</td>
</tr>
<tr>
<td>Searching, Evaluating, Re</td>
<td>19.10./</td>
<td>10.11.</td>
<td>11.11.</td>
<td>12.11.</td>
<td>23.10.</td>
</tr>
<tr>
<td></td>
<td>09.11.</td>
<td></td>
<td></td>
<td></td>
<td>30.10.</td>
</tr>
<tr>
<td>Creating and Distributing</td>
<td>19.10./</td>
<td>17.11.</td>
<td>na</td>
<td>19.11.</td>
<td>23.10.</td>
</tr>
<tr>
<td></td>
<td>16.11.</td>
<td></td>
<td></td>
<td></td>
<td>30.10.</td>
</tr>
<tr>
<td>Implementing OER I</td>
<td>19.10./</td>
<td>24.11.</td>
<td>25.11.</td>
<td>26.11.</td>
<td>23.10.</td>
</tr>
<tr>
<td></td>
<td>23.11.</td>
<td></td>
<td></td>
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<td>30.10.</td>
</tr>
<tr>
<td>Implementing OER II</td>
<td>19.10./</td>
<td>02.12.</td>
<td>na</td>
<td>04.12.</td>
<td>23.10.</td>
</tr>
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<td></td>
<td>01.12.</td>
<td></td>
<td></td>
<td></td>
<td>30.10.</td>
</tr>
</tbody>
</table>

Explanation of activities:
- **Welcome:** Introduction of the module on the teachable platform (ready when the platform is opening up)
  Post about the start of the module and the webinar in the google+ community and with neroop (in the week in which the module "starts")
  Post about the start of the module in the forum of the Moodle platform
- **Q&A:** Check if anyone posted a question on teachable. Answer question. Forward question to expert.
- **Webinar:** Mediation of the webinar (intro and host). Get in contact with the expert beforehand, discussing the information he/she has to cover.
- **Forum Discussion:** Check if there are any discussions being started in the forum. Start a teaser question in the forum.
- **Q&A:** Check every Friday, if any questions occurred concerning your module for learners who may work their way through the modules individually
OER Jams + Coaching and peer-learning phase (CPLP)

Step 2+3:
During the OER Jam, the coaching and peer-learning phase (CPLP), learners take their gained general and more theoretical knowledge of the online learning phase to a practical next level. The learner uses the acquired knowledge of the online learning content and puts it to practice in a specific project.

The projects that are being worked on during the OER Jams and during the CPLP could be anything from a strategy for more openness within an institution, or developing OER in the classroom, to starting to create an open network, for example. Ideally, these could be project ideas, which the learners derived from their daily work and bring to the workshop. But the project ideas could also be “fictional” and developed during the workshop. To support the learners in developing a targeted creative idea OERup! has developed the OER Project Canvas. This also contributes to create an open and collaborative minded atmosphere within the workshop.

Main aims of OER Jams:
the participants...
- experience open learning through sharing their experiences and engaging in common project development
- have tested OER project development and management tools and schemes
- ideally, define first milestones of concrete projects and even carry out first activities during the CPLP
- network with peers in their region and the partner regions.

the training package as a whole...
- receives an evidence-based content review
- is being complemented with hands on practice experiences

milestones to be achieved for the training pilot:
- developing/defining the project idea - “my idea” template
- sharing these ideas with the google+ community
- first superficial brainstorming with the OER project canvas - canvas template
- defining the first three milestones to be achieved until the final webinar on March 10th

How such a workshop can be structured can be seen in Annex 1 outlining the detailed agenda of the OER Jam.
**Activities of the CPLP:**

Throughout the OER Jam all participants should learn and experience to collaborate – so they will be asked to mentor each other through the google+ community, and consult the experts or other learners in the community for advice.

Each project developed during the Jams appoints a leader among the participants and is assigned with a facilitator from the partnership. The facilitator is responsible for making sure the group stays in touch with the community and gets answers, ideas, stimulations from the outside. But the project group should be aware that it is their responsibility to drive the project forward.

The steps to be taken by each group after the Jam:
1. The first three milestones that are realistic to reach for the final webinar on March 10th should be defined
2. At least one person per project should have joined the google+ community
3. Throughout the CPLP process, the facilitators will stay in close contact with the project leaders and consult them via email or phone on a regular basis to find out about their progress. In addition, the google+ community is regularly being checked, in case the project leaders post questions.
4. For the final webinar, all projects should prepare three slides to describe its project and its first lessons-learned.

A guide has been set up to help learners through this process (see Annex II)

**5. Lessons-Learned**

**Online learning phase**

**preparatory work:** As the online learning phase was foreseen to be a self-directed learning phase it was important to structure the learning platform in a very clear way and offer the learners concrete guiding structure on the platform so that it is easy to understand how to use the platform and the learning material delivered on it. The selection of the appropriate learning and collaboration platform is an important issue which should not be neglected.

**during the online phase:** Although the learners were encouraged to follow a self-directed learning approach the consortium decided to support and encourage their learning activities by initiating 1-2 key discussions per week. Despite this activity it was still quite a big challenge to motivate the online community to actively participate in these discussions. Another important issue is the level of digital literacy. A feedback from the online participants was that participating in the online learning phase requires quite a high level of digital literacy which is not necessarily given. Therefore it is always important to think about who are my learners and are they digital literate enough. Sometimes it is then important to offer more online support and moderate it more intensively. Or even think about to offer more face-to-face trainings.
Content: The flexibility of the learning content was very much appreciated by the learners. Each module can be used as a stand-alone module and the learner does not have to follow all the modules. Another positive aspect highlighted by the learners was the media mix (text, videos, interactive live webinars, quizzes, discussions) to deliver the content.

OER Jam

Stuttgart (Germany):

preparatory work: Making basic knowledge of OER and OEP a prerequisite, saved a lot of time and helped focusing on the practical part of the workshop. (Participants were informed that all background information can be found in the online material). Most participants did not do the tasks, they were asked to do. But they had a very good impression about what the workshop will be about and what is expected from them during the jam, when they arrived, which had a quite positive effect on the face-to-face day. Inviting people to be there online to respond to the participants posts on social media, was very useful and effective.

during the workshop: People enjoyed the mix of input and group work. It was interesting and helpful to cluster different ideas and have people from different institutions to brainstorm on one project together. It was helpful to print handouts with a short overview of Creative Commons for each participants, so they can sneak.

content: One tool a day to work on (like the OER project canvas) is enough. Participants found it difficult to differentiate between the “resource” and “revenue stream”. Participants easily forget that “revenue streams” don’t only have to be monetary.

Timisoara (Romania):

preparatory work: very few participants came with the task done, arguing that they did not have enough time or they did not understand very well what they were asked to do it.

during the workshop: For many, the term open education and open educational resources was not well known and well understood, presenting concepts from the beginning was very appreciated. It was very easy to group a certain idea and to work on a project idea on the materials provided. The participants highly appreciated the workshop for its dynamic, interactivity and international importance of the topic.

content: It was challenging to adopt the canvas from a business perspective to a OER project. In the past, there was a great fear of plagiarism. But the workshop engaged people to begin to cooperate and share things. Participants had to learn how to work in a team and to understand that the success of a project depends on the relationship we have with everyone else.
6. Monitoring and assessment

**In a very general way, assessment can...**

- involve different actors: teachers, students or external people (experts, for example).
- take place in different moments: before, during or after the activity.
- present different formats: text, video, audio, image, etc.
- have different objectives: to assess the whole activity, just a part.

**According to the kind of actions for each module, we propose that each module could have...**

- a rubric. It will guide the participant about how he/she is developing the activity
- some questions (from 1 to 3) which help the participant to reflect on the topic (like a portfolio, to draw conclusions)
- any kind of action/activity that you consider. For example, we propose that at the end of the module, participants share with mates their work in order to discuss about it, share their experiences and lessons learned.

Here you have some ideas about assessment, if you want to take a look at:

- Selecting methods of assessment
- Forms of assessment
- Methods of assessment
- Effective Assessment in a Digital Age
- e-assessment: tools and strategies (prezi presentation)
OER JAM Agenda - STUTTGART / February 2016

<table>
<thead>
<tr>
<th>time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:30</td>
<td>Arrival</td>
</tr>
<tr>
<td>10:00</td>
<td>Welcome</td>
</tr>
<tr>
<td></td>
<td>presenting the agenda + getting to know each other</td>
</tr>
<tr>
<td></td>
<td>(participants present the matrix they prepared)</td>
</tr>
<tr>
<td>10:15</td>
<td>“Pecha Kucha” inspiring short presentations of examples (e.g. how to develop an open institutional strategy, how to develop OER in the classroom, how to start an open network...)</td>
</tr>
<tr>
<td>10:40</td>
<td>Participants pitch their ideas</td>
</tr>
<tr>
<td></td>
<td>Participants brainstorm ideas</td>
</tr>
<tr>
<td></td>
<td>Participants are divided in groups (of their preference and interest)</td>
</tr>
<tr>
<td>11:15</td>
<td>Explaining the OER Project Canvas with the help of an example. (e.g. one good example from the “pecha kucha” session)</td>
</tr>
<tr>
<td></td>
<td>Giving participants tips and tricks to work with the Canvas</td>
</tr>
<tr>
<td>11:45</td>
<td>Presenting the google+ group and the online experts</td>
</tr>
<tr>
<td></td>
<td>Participants need to describe their idea in 2 sentences and post it on google+</td>
</tr>
<tr>
<td></td>
<td>Experts are ready to have a look and post first comments</td>
</tr>
<tr>
<td>12:30</td>
<td>light lunch</td>
</tr>
<tr>
<td>13:30</td>
<td>Each group works on the Canvas</td>
</tr>
<tr>
<td></td>
<td>(recommendation: use Statty Notes to fill in the canvas)</td>
</tr>
<tr>
<td>14:30</td>
<td>Group result pitch and feedback by from the other participants (maybe in world café style)</td>
</tr>
<tr>
<td></td>
<td>Formulating questions on google+</td>
</tr>
<tr>
<td></td>
<td>+ integrated coffee break</td>
</tr>
<tr>
<td>15:30</td>
<td>creating an activity plan and time line for the different projects</td>
</tr>
<tr>
<td>16:30</td>
<td>define and formulate the next steps and obligations concerning the OERup! project (until the final webinar) and the google+ community</td>
</tr>
<tr>
<td>17:00</td>
<td>end</td>
</tr>
</tbody>
</table>

Workshop preparations for learners (to be sent about 1 week in advance)

- registration on google+ and joining the google+ community
- answering the questions of the matrix
- (to be presented during the workshop)
- thinking of a project idea (optional)
- basic knowledge of training (modules 1-4)
Dear OER Jam participant!

This little guide “my OER project” has been created to serve and guide you through your first steps of the project implementation process. We ask you to share the experiences you make with the OERup! team as well as with the other jam participants through the google+ community, so we can learn from each other.

1. Project Profile

With the template “my idea”, which you have received beforehand and used during the OER Jam, you have outlined your initial idea. Now that some first discussions and evolvement may have taken place, please fill in this project profile below.

<table>
<thead>
<tr>
<th>Title of the initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
</tr>
<tr>
<td>Weblink</td>
</tr>
<tr>
<td>Challenge:</td>
</tr>
<tr>
<td>Solution:</td>
</tr>
<tr>
<td>Framework of the project:</td>
</tr>
<tr>
<td>Target Group:</td>
</tr>
<tr>
<td>Main project goals:</td>
</tr>
</tbody>
</table>
2. Refine on your Canvas:

During the OER Jam, you have been introduced to the OER Project Canvas, and have had a first brainstorming run with your idea through each block. Now, a few days after the jam, having digested all information, and maybe after having had some discussions with colleagues, take your time to thoroughly go through your Canvas again, and fill in the details.

Use these guidelines that help you fill in the gaps:

- OER Project Canvas – Step by Step
- OER Project Canvas – Rules

3. Set your milestones, define a timeline, and allocate concrete tasks

Good project management requires the definition of milestones and a timeline for all key activities. This timeline may serve you, as project manager to stay on top of things, but also to show all of your stakeholders that this project requires some resources to be taken seriously. Once your Canvas is filled, you should have listed all the key activities that are needed in order to realize your project. Cluster and priorities these activities, and bring them in a timely order, which could look like this:

When you look at your Canvas, you also know your partners, and your key resources (specific personnel, for example) – make sure you consider them, when describing and assigning all activities in an activity plan.
4. Your milestones until March 10th

During the Jam, we have informed you about the end of our official training phase, which finishes off with a final webinar on March 10th, within the framework of the Open Education Week (www.openeducationweek.org).

The aim of this webinar is to share your experiences made with the development and implementation of your OER project idea.

For this deadline, you also have set yourself initial milestones, you considered realistic to achieve.

In order to help you keeping an eye on your project progress, and to note some lessons-learned as you go along, we will stay in touch with you and have prepared some guiding questions that you could use to assess your project activities (if applicable):

- Describe your work with the OER Project Canvas (did the canvas as a whole, the individual blocks, and their interaction make sense? Did it take a long time to fill in the details? Etc...)

- Explain how your project idea had to change or evolve once you gathered more information or analyzed the status quo in your work environment?

- How did your first work meetings for the OER project go?

- Who finally is actively involved in the implementation process?

- How do you assess the support for implementing the OER project in your organization? Who turned out (maybe surprisingly) to be the main drivers?

- Which are the most hindering difficulties you have to handle during the implementation phase?
Do you have a plan or ideas how to overcome them?

Which turned out to be the success factors in implementing your OER project?

Which positive effects have appeared in your daily work/ your organization/ your colleagues, since the implementation of the OER project have started?

Are there any negative effects? If so, explain which ones.

Do you see potential for the consolidation of OER in your work/organization?

……..

5. Your project and OERup! after March 10th

We would like to list your project and the experiences you made in creating and implementing it along with other practice examples in our OERup! Guideline. This guideline supports other actors in adult education to create and carry out their own Open Educational Practice.

Even though, the official pilot training phase closes with the final webinar, we would like to stay in touch with you and your project. The OERup! team, as well as the google+ community will remain at your disposal, if you need further support. In parallel to your project development, we will search and share suitable practice examples for you to learn and profit from.