



JISC Project Plan for OTTER

Overview of Project

1. Background

1.1 Project Overview

The Open, Transferable and Technology-enabled Educational Resources (**OTTER**) project at the University of Leicester will enable, pilot and evaluate systems and processes designed to enable individuals, teams and departments to release high quality open educational resources (OERs) for free access, reuse and repurposing by others, in perpetuity. OTTER will contribute a body of high quality OERs from nine departments at Leicester. OTTER brings together OERs from a range of subjects together with staff development and student support materials. The departments will learn from and benefit from each others' work and add value to the project. Continuity plans for after the project are already being developed. Equivalent to a total of at least 360 credits, these OERs will be free to access online, use, adapt and repurpose under an appropriate open licence, and will be valuable to academics, past, current and future learners, funding agencies and professional organisations in the relevant fields worldwide. OTTER will make extensive use of learning technologies and maximise the affordances of the JorumOpen platform, Leicester's institutional open source platform, Plone and HE Academy's EvidenceNet. OTTER will inform institutional and sector policy on the release of existing digital content as OERs. OTTER's deliverables and benefits will be disseminated widely across the institution, the sector and internationally well beyond the project's life.

1.2 OTTER builds on previous work:

- a. Based at University of Leicester, the Beyond Distance Research Alliance is a leading research and development unit in the field of learning design and technologies. The experience of Beyond Distance Research Alliance and OTTER's partners within the University of Leicester includes IPR expertise, materials design and development for interoperable platforms
- b. The OTTER OERs will consist of pre-existing teaching material from the project partners that have been successfully used in University of Leicester learning programmes.
- c. Leicester's exceptionally strong institutional commitment and desire to engage with OERs is backed by the Vice-Chancellor's Advisory Committee's decision (05/02/09): "The outcomes of the OTTER pilot will inform the university's future policy on OERs. The Beyond Distance Research Alliance, in collaboration with the Library and all participating departments, will undertake the research and development to establish evidence."
- d. OTTER will provide evidence for the sustainable release of future OERs at University of Leicester and across the sector through the adaptation, integration and transfer of lessons learned from other relevant projects (e.g. CASPER, MERLOT, RepRODUCE, Web2Rights) and well-documented and researched experiences in OERs (including MIT's Open Courseware, Rice University's Connexions and the OU's OpenLearn project).
- e. The OTTER partners have ample experience in the production, release and successful reuse of OERs. For example, Dr Pam Rogerson-Revell (Education) already developed a set of OERs for the Language and Linguistics Subject Centre. Archaeology, Law and the Student Support and Development Service already use OERs successfully as part of their provision.
- f. Since 2005, the Beyond Distance Research Alliance has successfully run, disseminated and published on 13 externally-funded projects, which have contributed to institutional and sector policy on learning technology and innovation to practice.
- g. OTTER is committed to ensuring that the OERs are usable for mobile and off-campus learners through the use of personal devices and Web 2.0.

1.3 The need for OTTER

- a. Changing institutional processes and practice is central to OTTER. OTTER will deliver the key benefits of the open release of learning resources at the University of Leicester (Yuan et al, 2008) and meet identified needs for the following:
 - i. A marketing tool to promote the University of Leicester, its staff and the UK higher education (HE) sector globally, and to attract a diverse population of students, particularly international and non-traditional learners.
 - ii. Modernising a significant amount of digital content at University of Leicester and sharing it locally and globally.
 - iii. Increased student satisfaction, at the University of Leicester and elsewhere, in the availability, quality and ease of use of learning materials.
 - iv. A contribution to the growth and success of the HE sector in the developing world through the release of free, high quality resources for reuse and repurposing.
 - v. Capitalising on the investment that has already been made at Leicester in digital content, for the benefit of a much wider audience and for different modes of learning including the use of Web 2.0 applications, Second Life and content designed for new portable devices such as e-book readers.
- b. In line with the findings of earlier OER studies (e.g. Iiyoshi and Kumar, 2008), a global audience for OTTER's OERs has been identified. (See 'Stakeholder Analysis' below.)
- c. OTTER recognises that the full potential of OERs is realised when academics participate in the development of open educational content by contributing both their digital learning materials and their pedagogical expertise in presenting their OER materials (Carey and Hanley, 2008). The OTTER OERs will thus include open pedagogical content, illustrating how the materials have been used successfully in particular learning contexts. OTTER will not only release OERs but also appropriate guidance for use and transferability.
- d. All material released through OTTER will be easy to find, use, repurpose, aggregate and tag. Each resource will contain relevant metadata, including title, author(s), affiliation, date, URL, technical information (e.g. file format, name and size), language information, subject classifications, keywords, tags, comments and descriptions. All OTTER resources will adhere to guidance on metadata that the funders will provide and will be released under an open licence (Korn, Oppenheim and Duncan, 2008). OTTER's processes and outputs will be informed by the latest research, innovations and practice in learning design, pedagogy and technologies.
- e. A significant component of the work of OTTER will focus on copyright and IPR clearance, including third-party rights. OTTER will make extensive use of guidance offered by JISC, such as JiscLegal, JISC IPR Consultancy and TrustDR, in addition to the projects listed under Section 10, below.

1.4 The business case for OTTER

- a. Iiyoshi and Kumar (2008) provide a comprehensive set of international experiences and a critique of how OERs can be used to improve an institution's profile and standing, as well as how OERs can enhance the experiences of current and future learners at those institutions. OTTER will use these findings to articulate appropriate processes to enhance the impact of OERs on teaching at University of Leicester.
- b. OTTER offers Leicester an institutional innovation and transformation project enabling a serious and supportive start to get University of Leicester's OER initiative started.
- c. McGill et al (2008), as part of their 'Good Intentions' report (commissioned by JISC), offer useful guidance on business models and scenarios to support the sharing of learning materials. The OTTER project draws on the following four approaches to sharing (McGill et al, 2008: 2-3):
 - i. Open sharing: a completely open approach to sharing OERs, in line with the spirit of this call.
 - ii. National sharing, across subject areas and domains.
 - iii. Sharing through communities of practice, i.e. with people with a common practice or interest, but not necessarily discipline-based.
 - iv. Institutional sharing: within and across departments at University of Leicester.
- d. The OTTER project is ideally placed to make a high-impact contribution within the following three scenarios identified by McGill et al (2008), which enable the implementation of the above approaches:

- i. Institutional sharing. Improving learning and teaching practice at the University of Leicester and student access to learning opportunities will enhance the university's positioning and reputation.
- ii. Sustainable global sharing. The Beyond Distance Research Alliance is a Community of Expertise recognised by the United Nations and a well-networked organisation to contribute to the global community and to support developing countries and disadvantaged learners (see <http://elkscommunity.wetpaint.com/>).
- iii. National sharing. Effective use and re-purposing of publicly funded resources and widening access to HE across the UK.

1.5 Meeting the funders' conditions

The OTTER proposal will meet the three conditions named by the funders:

- a. Open Education Resources may contain third party copyright material, for example diagrams, photographs, film clips etc. Third party copyright material needs to be cleared for use with the rights holder, who may be commercial publishers. The University already pays a fee to third party rights holders for inclusion of their copyrighted material in education resources. However, the permission is currently requested and granted for use by University of Leicester registered students only, be it for inclusion in printed or online material. Within the OTTER budget is an amount (£20,000) that can be used to pay for copyright cleared third party material. The cost of clearing material for open access is an unknown, and part of the learning from the project. Any cost will be examined, in discussion with academic colleagues, to ensure that it offers value for money.
- b. The University of Leicester is about to adopt a new and extensive Learning Innovation strategy for the next three year which is based on 1. Evidence for change benefitting students' learning and 2. Collaborative processes across academic departments and corporate services units. OTTER will be a central plank and outcomes will be sustained after the life of the project as part of the new strategy
- c. The materials to be released under the successful Physical Sciences Subject Strand will not form part of OTTER. The 360 credits of open content to be released as part of OTTER are unaffected by the Physical Sciences project.

2. Aims and Objectives

The primary aim of OTTER is to pilot, analyse and model effective processes for the successful release of highly usable, adaptable, technology-enabled OERs at the University of Leicester. Specifically, OTTER will:

- a. Contribute, through effective models for OER release, towards the marketing and positioning of the University of Leicester and the UK HE sector among prospective students globally
- b. Modernise, update, tag, categorise and release at least 360 credits' worth of digital materials from seven academic departments, from Staff Development and from Student Support Services, for open use and repurposing.
- c. Integrate lessons learned from previous OER experiences to identify the key challenges associated with the clearance of rights, licensing and release of existing resources for free open access and repurposing.
- d. Support individuals, teams and departments to release their digital content for free use and repurposing.
- e. Promote the sharing and reuse of high quality OERs within University of Leicester and across the sector.
- f. Populate, test the affordances of, and inform future versions of JorumOpen and the University of Leicester's open repository.
- g. Build capacity and provide evidence, in usable formats, to influence future institutional and cross-sector policy in respect of OERs at University of Leicester and elsewhere.
- h. Widely disseminate OTTER's outcomes locally, nationally and globally, well beyond the duration of the project, through University of Leicester's high-profile presence at international conferences, communities of practice, publications and via Plone, Leicester's institutional OER repository.

3. Overall Approach

Strategy and/or methodology and how the work will be structured

1. Beyond Distance Research Alliance will:
 - a. Lead, manage and ensure the successful completion of all workpackages (Appendix B) and deliverables (See Section 4 of this project plan) of the OTTER project.
 - b. Coordinate and provide feedback on each department's input.
 - c. Regularly contribute to the enhancement of all OERs.
 - d. Widely disseminate the outputs of OTTER and its sister projects under the OER Programme.
 - e. Report to the funders as requested
 - f. Lead contributions to funders' support and dissemination activities.
 - g. Contribute its own OERs as a partner (see Table 1).
2. Each partner will provide digital content as indicated in Table 1. The University of Leicester Library provides guidance on IPR, copyright, open licences and liaison with publishers to the OTTER team. Members of the OTTER team will attend JISC training as appropriate.
3. Each OER is a discrete, stand-alone resource. Departmental teams will incorporate the OTTER resources, in their new formats and platforms, into their own teaching. Exposure to OERs developed by others across the OER Programme will give OTTER partners maximum potential for development and reusability of materials.
4. Learners (past, current and prospective) are OTTER's key beneficiaries. Current Leicester students will be invited to 'reality check' and provide feedback on OTTER OERs before they go live.
5. OTTER has developed an embryonic process model based on the life of an OER from leaving the lecturer's hands to being fully accessible on a range of open platforms. A key aspect of the OTTER method will be to establish, develop and build upon the model, so that by the end of the project is it credible, usable and transferable.

Important issues to be addressed – Intellectual Property Rights

IPR is central to OTTER. Intellectual property owned by third parties will be identified early on in the project (See WP3 – IPR clearance – in Appendix B). Substantial resources and expertise have been allocated to addressing and resolving the multiple IPR issues associated with OERs in the context of OTTER, such as third party rights in existing digital resources. (See Item 10 below.)

Scope and boundaries (including what will not be covered)

1. Nine institutional partners, together with the University of Leicester Library, are committed to OTTER at all levels. Their participation in this project is backed up by a strong and long-term institutional commitment. **Table 1** summarises each partner's contribution to OTTER and its indicative credit weighting.

	Source of OERs (module names or topic areas)	Level	Indicative credit weighting
Beyond Distance Research Alliance	<ul style="list-style-type: none"> ▪ Learning Futures, strategies and scenarios for the future ▪ Learning Design ▪ E-moderation, e-tivities and the 5-stage model ▪ Second Life artefacts and resources. 	PG	12
Archaeology and Ancient History	<ul style="list-style-type: none"> ▪ Archaeological Theory (Second Life artefacts). 	UG	3
Education	<ul style="list-style-type: none"> ▪ Introduction to Applied Linguistics and TESOL ▪ Phonetics and Phonology 	PG	25
Law	<ul style="list-style-type: none"> ▪ Company Law ▪ Financial Services Crime 	UG & PG	35
Politics and	<ul style="list-style-type: none"> ▪ The Art of Negotiation 	PG	180

International Relations	<ul style="list-style-type: none"> ▪ Ascent to Pre-eminence: the United States Emergence as a Global Power 1898-1948 ▪ Visions of the Modern American Presidency ▪ American and the World: US Foreign Policy ▪ Dissertation writing 		
Psychology	<ul style="list-style-type: none"> ▪ Selection and Assessment ▪ The Psychology of Organising ▪ The Individual at Work ▪ Ergonomics 	PG	80
Staff Development Centre	<ul style="list-style-type: none"> ▪ Introduction for Lecturers New to Teaching in Higher Education 	PG	5
Student Support and Development Service	<ul style="list-style-type: none"> ▪ Applying for Jobs ▪ Careers Service Resources ▪ Job Hunting ▪ Options After Graduation ▪ Career Action Plans ▪ Study, Presentation, Writing, Research, Numeracy and IT Skills. 	UG & PG	20
Genetics	This new partner joined OTTER in mid May 2009 (It was not included in the original bid). Its contribution is still under discussion.		
Total	OERs from 9 departments/units		360 (minimum)

Table 1: Summary of OERs to be delivered by OTTER

2. What is *not* included in OTTER is the development of new teaching materials. All OERs will be derived from existing materials that are in use in the named subjects.

Critical success factors

1. The volume and use of OERs is a key measure of success of this pilot. The OTTER team will work with the funders to develop suitable mechanisms and applications for tracking on JorumOpen. OTTER will have its own tracking and reporting in place for all resources released through the University of Leicester's institutional repository.
2. We will evaluate based on the deployment by the audience for formal and informal learning purposes. (See item 17: Quality Plan)
3. Sustainability is critical to the success of OTTER. OTTER intends to pilot at least two mechanisms for sustainability:
 - a. OTTER will influence university policy to put systems, processes, motivation and support in place to follow the agreed process to address copyright and IPR concerns for all future materials development, whether or not the resources are planned to be published in an open platform.
 - b. Tagging, publishing and linking to digital content within an open platform such as JorumOpen or University of Leicester's open source Plone should not be harder or more time-consuming than uploading the same content to the institutional VLE. The OTTER team will work in collaboration with partners to encourage publication to open platforms rather than password-protected areas on a VLE. Resources can then be easily integrated with the other online components of the course through appropriate links. This translates into the effective integration of OERs into the partners' existing courses, and the use of existing OERs in the development of new ones.

4. Project Outputs

OTTER's deliverables are:

1. A structured and coherent collection of high quality, up-to-date OERs equivalent to at least 360 credits (Table 1) and in appropriate formats, with their relevant metadata, from nine University of

- Leicester departments, openly available through appropriate channels (See Section 9.3 of this project plan) for free use and repurposing, under an open licence and in perpetuity. The OERs originate from traditional disciplines as well as from Beyond Distance Research Alliance (research to practice in learning technology), Staff Development and Student Support Services.
2. A sustainable model for the release of existing learning materials as OERs at team, departmental and institutional levels. The University of Leicester will be used as a case study and example including the wide range of institutional processes involved, internal partnerships and implementation through its new Learning Innovation Strategy (likely to be accepted by the University of Leicester Senate in July 2009).
 3. Piloted processes to provide evidence for institutional policy changes and support for the release of open resources, with usable documentation for transferability.
 4. A set of standards, processes and policies to support the continuation and extend the volume and quality of the release and dissemination of OERs by teams, departments and the university.
 5. Evidence of use of the OTTER OERs, including user cases with feedback.
 6. Guidance, documentation and check lists to support the release of future OERs.
 7. A comprehensive OTTER interactive website (available at <http://www2.le.ac.uk/departments/beyond-distance-research-alliance/projects/otter>) and blog (available at <http://projectotter.wordpress.com/>)
 8. Reports to the funders.
 9. A minimum of two academic papers for submission to refereed journals and four conference papers presented within 18 months of the start of the project.
 10. Three OER awareness-raising events involving University of Leicester staff and students.
 11. An end-of-project OER symposium, in coordination with JISC and the HE Academy.

5. Project Outcomes

OTTER's outcomes are:

1. A piloted model process and criteria that promote and enable extensive adoption of the concept and use of OERs in the future at the University of Leicester. Leicester's established research to practice, innovation to mainstream, pilot to scale capability has shown that a substantial and well-executed pilot is likely to lead to true transformation in the university.
2. Wider, improved institutional understanding of and commitment to the value of free OERs for promotion and positioning purposes in a global HE market, across all levels and categories of staff including senior managers, supporting its extensive distance and work-based learning marketing efforts.
3. Departmental and institutional awareness of OERs and associated process and benefits at Leicester.
4. Departmental and institutional workflows for managing content and resources.
5. Understanding of the limitations and benefits of different file formats for OERs by technologists at University of Leicester.
6. Understanding of the advantages and pitfalls of different platforms for OER sharing to inform future institutional choices.
7. Articulation of mechanisms for search engine optimisation and resource discovery such as tagging.
8. Enhanced capacity across all subjects involved in the generation and release of high quality OERs.
9. Strong evidence-based influence on institutional and sector policy on the future of OERs.
10. Improved staff commitment and motivation to engage in the collaborative development of OERs.
11. Increased satisfaction of future, current and past students through access to OERs.
12. A significant contribution to the learning and teaching, innovation, e-learning and widening participation policies and strategies at University of Leicester.

6. Stakeholders (Analysis)

Table 2 summarises the stakeholders, their interest/ stake in OTTER and the importance to each one.

Stakeholder	Interest / stake	Importance
Internal project partners	-Models for successful dissemination of learning materials as OERs -More effective curriculum delivery to current and future students -Prestige of being associated with a successful OER project	High
University of Leicester Library	-Models for IPR clearance -More effective service to staff and students	High
Information librarians	-Models for IPR clearance -Better understanding of IPR issues in digital materials	High
University of Leicester's Senior Management Team	-Incorporate principles of Open Education into institutional policy and strategy	High
JISC and HE Academy	-Funders -Able to disseminate information about OTTER -Desire to see successful implementation of OERs	High
OTTER's 'sister' projects	-Sharing knowledge with OTTER	High
Current and prospective University of Leicester students (home and overseas)	-Users of the OERs -Potential advocates for University of Leicester	High
HE and FE learners and tutors	-Users of the OERs -Tutors – contributors of further OERs	Medium
The HE sector	-Users of the OERs and contributors of further OERs	Medium
National and international funding agencies	-Potential advocacy bodies for University of Leicester	Medium
Potential students from disadvantaged backgrounds	-Users of the OERs	Medium
Learning technologists	-Contribute further OERs -Learn best practices from OTTER OERs	Medium
Past University of Leicester students	-Potential advocates for University of Leicester	Medium

Table 2: Stakeholder analysis

7. Risk Analysis

Table 3 indicates the factors that could pose a risk to the project's success, their likelihood and severity, and how we will prevent them from happening (or manage them if they occur).

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk (update 29.5.09)
Staffing: Failure to recruit or absence/loss of staff	1	3	3	All (bar one part-time member of staff due in Sept) now in post and inducted. Supportive team culture in event of unplanned absences.
Organisational: Lack of buy-in from partners	1	3	3	All partners voluntarily agreed to join OTTER. Some are already OER practitioners. OER collection already going well and continuing commitment displayed. (29/05/09 and 30/06/09)

Technical: Inadequate technical support	1	4	4	Back-up support available from within Beyond Distance Research Alliance and from IT Services.
External suppliers: Inability to meet agreed deadlines, e.g. JorumOpen platform does not materialise in time or to agreed standards.	2	4	8	All OERs will be delivered via the University of Leicester's <i>Plone</i> site, in addition to the JorumOpen platform. EvidenceNet from the HE Academy will also be deployed.
Legal: Unsuccessful clearance of rights within certain OERs	2	3	6	Significant commitment of resources to IPR and copyright clearance, supported by Senior Librarians (see Steering Group members). <i>Note: To date the risk in this area appears not to be high, as the team's experience has been adequate for the challenges encountered so far. (Added 29 June 09.)</i>
Adoption: Failure to enable wider adoption and scaling-up of models developed	2	3	6	Beyond Distance Research Alliance is a leading research unit with a reputation for open worldwide dissemination. Excellent internal and external networks give the project team credibility to disseminate and evaluate experiences and findings. Strong Steering Group involvement to provide pragmatic project guidance and institutional positioning.

Table 3: Risk analysis

8. Standards

1. OTTER will adhere to general principles of sharability and interoperability through the use of standards as required by JorumOpen. (See Section 13.1.)
2. The project will also follow general principles of usability and accessibility, as recommended by JISC's TechDis service. (See Section 13.1.)

9. Technical Development

1. Each OER in OTTER will have a clear purpose and will be highly usable and adaptable. Through the appropriate use of different media and technologies, the project will benefit its diverse audience in the following ways:
 - a. OERs to be accessed using mobile devices (mobile phones, PDAs, MP3 players and pocket PCs), capitalising on the outcomes of earlier projects funded by JISC and the Academy such as WoLF (<http://moodle.le.ac.uk/wolf/>) and IMPALA (www.impala.ac.uk).
 - b. Resources available for pulling, as well as syndicated content (e.g. through RSS feeds).
 - c. Audio and video content (e.g. podcasts – see IMPALA).
 - d. Content designed and formatted for e-book readers (see the DUCKLING project, <http://www.le.ac.uk/beyonddistance/duckling>, funded by JISC).
 - e. Material designed for the Second Life 3-D Multi-User Virtual Environment (using the outcomes of the JISC-funded MOOSE project, <http://www.le.ac.uk/beyonddistance/moose/>).
 - f. Content that capitalises on the affordances of Web 2.0 applications (e.g. wikis, blogs) and social networking tools such as Bebo, Facebook and NetVibes.
2. Each resource will be released in appropriate formats to ensure accessibility, easy adaptation and repurposing. Key learner needs such as easy retrieval, editing and linking to, from and within other materials, are particularly important in OTTER and will be evaluated.
3. OTTER will maximise the functionality provided by the following platforms:
 - a. JorumOpen.
 - b. A dedicated area on University of Leicester's *Plone* open source system (<http://www2.le.ac.uk/>), which offers a set of tools for cataloguing, tagging and syndication through RSS feeds.
 - c. HE Academy Subject Centres' digital repositories.

- d. Publicly available and accessible collections of resources, such as (but not restricted to) YouTube channels (including University of Leicester's own channel), SlideShare and Flickr.
- e. Materials will be released as OERs on Beyond Distance Research Alliance's well-established Second Life Island and will be linked using the appropriate SLURLs.
- f. The HE Academy is currently piloting 'EvidenceNet', which will provide an evidence-based approach to informing learning and teaching. Appropriate OTTER resources will also be offered to EvidenceNet.

10. Intellectual Property Rights

1. All OTTER OERs will be released under suitable open licences. Depending on the discipline, context and type of OER, Creative Commons Licences or JISC Open Educational Licences will be used. In all cases, licences will permit free reuse and repurposing.
2. OTTER will deliver transferable models for teams, departments and institutions to understand and effectively address the complexities of IPR involved in the use of open digital content.

Project Resources

11. Project Partners

The Beyond Distance Research Alliance at University of Leicester is leading the project and is also a partner, providing its own OERs. Key internal partners are the Library and Information Technology Services (providing production support), and the following partners, who will be providing the OERs:

1. Archaeology and Ancient History
2. Education
3. Law
4. Politics and International Relations
5. Psychology
6. Staff Development Centre
7. Student Support and Development Service
8. Genetics
9. Learning futures, E-moderation and Online Learning (Beyond Distance Research Alliance)

12. Project Management

The **Project Team** (Table 5, below) works under the direction of Dr Alejandro Armellini (Project Director), and includes a subject specialist in each department, a dedicated learning technologist, a dedicated OER evaluator, and a dedicated copyright administrator. Regular reviews are undertaken of progress, action research, deliverables and plans with reports to the Steering Group, which meets every six months. The Team meets monthly in addition to online communications via the team wiki and virtual meetings. In the nine contributing academic departments, **the University of Leicester Partners** will be accountable jointly to the Head of Department and to the Project Director. These roles will provide discipline-specific peer guidance and mentoring and critical friend support to the departmental course teams involved, as well as support for project and sector dissemination. The **Project Steering Group** (Table 6) will include institutional, student and independent members and will meet ahead of project reporting to JISC.

The project team's training needs revolve around any support JISC can provide in terms of ongoing information about developments in Intellectual Property Rights for digital content.

OTTER PROJECT TEAM		
Team members	Time (FTE) + funding	Role in OTTER
Dr Alejandro Armellini Senior Learning Designer, Beyond Distance Research Alliance	0.20 – 12 months, IC	Project Director
Prof Gilly Salmon Professor of E-learning & Learning	0.10 – 12 months, IC	Strategic Lead for Sustainability, Student Experience and Institutional Evaluation

Project Acronym: OTTER
Version: FINAL
Contact: Gabi Witthaus
Date: 30 June 2009

Technologies Head of Beyond Distance Research Alliance, NTF		
Gabi Witthaus	0.60 – 12 months, PF	Project Coordinator
Dr Samuel Nikoi	1.00 – 12 months, PF	OER Evaluator
Tania Rowlett	1.00 – 12 months, PF	Copyright Administrator
Simon Kear	1.00 – 12 months, PF	Learning Technologist to support all partners, Teaching Fellow in Politics & International Relations.
Learning Technologist (to be appointed)*	1.00 - 9 months, PF	Learning Technology support to all OTTER partners
Dr Richard Mobbs Head of E-Learning Advocacy	0.05 – 12 months, IC	Project Adviser, OER technology and embedding
University of Leicester partners (see Table 1)		
Dr Palitha Edirisingha	0.05 – 12 months, IC	Lecturer in e-learning, Beyond Distance Research Alliance
Dr Mark Pluciennik	0.05 – 12 months, IC	Director of Distance Learning, Department of Archaeology and Ancient History
Dr Pam Rogerson-Revell	0.05 – 12 months, IC	Programme Director, MA in Applied Linguistics and TESOL, School of Education
Ian Snaith	0.05 – 12 months, IC	Senior Lecturer in Company Law, School of Law
Dr J. Simon Rofe	0.05 – 12 months, IC	Lecturer in Politics & International Relations
Dr Ray Randall	0.05 – 12 months, IC	Course Director for the MSc in Occupational Psychology and MSc in the Psychology of Work (distance), Department of Psychology
Derek Cox	0.05 – 12 months, IC	Acting Director of Staff Development
Paul Jackson	0.05 – 12 months, IC	Director, Student Support and Development Service

Table 5: The OTTER Project Team (PF = project funds; IC = institutional contribution)

* This appointment will take place by July 2009.

OTTER PROJECT STEERING GROUP MEMBERS	
Name and positions	Remit and contribution
Christine Fyfe PVC, Student Experience and University Librarian, University of Leicester	<ul style="list-style-type: none"> • Chair of Steering Group • Overall institutional direction and engagement • Institutional OER policy and strategy
Louise Jones Director, Library Services, University of Leicester	<ul style="list-style-type: none"> • Library strategy and service delivery, including overall responsibility for Copyright and IPR
Professor David Hawkrige Emeritus Professor, Institute of Educational Technology, The Open University and Visiting Professor, University of Leicester	<ul style="list-style-type: none"> • Extensive experience of open learning and processes
Richard Taylor Director of Marketing, University of Leicester	<ul style="list-style-type: none"> • Strategic implications of OERs for the marketing and positioning of University of Leicester internationally
Helen Lentell Director of Distance Learning Development, University of Leicester	<ul style="list-style-type: none"> • Strategy implications for University of Leicester DL strategy and operations
Alex Smith , VP, Academic Affairs University of Leicester Students' Union	<ul style="list-style-type: none"> • Student voices on OERs
David Sadler (HE Academy)	<ul style="list-style-type: none"> • Synergy with funders and sister projects

Table 6: OTTER Project Steering Group Members

The first meeting of the Steering group took place on Thursday, 28/05/2009.

13. Programme Support

1. The OTTER team will benefit from JISC's advice on standards for sharability and interoperability, and TechDis's advice on accessibility of OERs.
2. OTTER may also require advice from JISC on IPR issues related to OERs
3. The OTTER team has well-established links with other funded partners for OERs from collaboration on previous programmes, which will enable the teams to exchange support one another and share information. The partners are:
 - a. Oxford University's Open Spires project (from Beyond Distance Research Alliance's DUCKLING project)
 - b. Coventry University's Open Content Employability Project (from Beyond Distance Research Alliance's MOOSE project)
 - c. University College Falmouth's Open UCF project (from Beyond Distance Research Alliance's CALF project)
 - d. University of Plymouth's GEES project (from Beyond Distance Research Alliance's IMPALA4 project)

14. Budget

See Appendix A.

Detailed Project Planning

15. Workpackages

See Appendix B.

16. Evaluation Plan

Evaluation of the OTTER project will be based on stakeholder goals, challenges and expectations, using the 'Six Steps Approach' developed by Glenaffric (2007). The external evaluator will have full access to the stakeholders, deliverables, reports and outputs, documentary evidence and knowledge products and papers. The evaluation visits and indicative activities –focused on assessing the impact and success of the workpackages– will be scheduled at the project start-up (April-May 2009). The assessment of the quality, standards and usability of the OERs will be central to this evaluation and will inform future decisions.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Jun 09	Impact, success of WP1 (Project management & startup) Start, progress of WP2 (Materials collection) Start, progress of WP10 (Dissemination)			<ul style="list-style-type: none"> • Successful completion of current and forward plans for remaining workpackages
Jun 09 – Feb 10	Impact, success of WP2 (Materials collection), WP3 (IPR clearance), WP4 (Formatting) Progress of WP10 (Dissemination)	<ul style="list-style-type: none"> ▪ Have the WPs been successfully executed? ▪ Has there been any deviation from the original plan? ▪ What are the key challenges that have been encountered? How have these challenges been resolved? ▪ Has OTTER moved towards the achievement of its objectives? ▪ Do the OERs meet the quality criteria identified in WP2 (Materials collection)? (See Quality Plan) ▪ Have the activities conducted as part of the WPs contributed to the identification of appropriate OER-related research questions for future work? 	<ul style="list-style-type: none"> ▪ Ongoing monitoring, feedback and adjustment of interventions ▪ Ongoing evaluation of OERs – matching against criteria derived from literature and University of Leicester best practice ▪ Assessment during project meetings ▪ Analysis by SG ▪ External evaluation (Glenaffric & ELDDA) 	<ul style="list-style-type: none"> • Successful completion of 'Collection, clearance and formatting' phase. • Completion of: <ul style="list-style-type: none"> ○ review of current processes and plans ○ stakeholder consultation ○ characterisation of changes needed ○ planning for OER testing (validation and reality check) • Ready OERs for testing • Inputs into internal educational resource development processes • Capture/analysis of data on processes developed for releasing OERs • Stakeholder engagement • Ongoing dissemination
Sep 09- Feb 10	Impact, success of WP5 (Validation with partners), WP6 (Reality check by students) Start, progress of WP7 (Release & testing), WP8 (Tracking), WP9 (Lessons learned) Progress of WP10 (Dissemination)			<ul style="list-style-type: none"> • Successful completion of validation and reality checking • Capture/analysis of findings • Redeveloping systems and processes for releasing OERs • Stakeholder engagement • Ongoing dissemination

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Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Jun 09- Apr 10	Impact, success of WP7 (Release & testing), WP8 (Tracking), WP9 (Lessons learned) Progress of WP10 (Dissemination) Impact and success of project WP11 (Evaluation & sustainability)			<ul style="list-style-type: none"> • Reporting from WP5 (Validation with partners), and WP6 (Reality check by students). • New OERs identified for embedding • Embedding and sustainability plans • Reporting from evaluation of the pilot phases • Increased clarity on copyright and IPR issues for institutional and sector benefit • Lessons learned embedded in internal processes and discourses • Dissemination at national and international level

Table 7: OTTER Project Evaluation Plan

17. Quality Plan

As part of WP2 (Materials collection), the OTTER team is developing quality criteria for the OERs themselves, as well as for the validation and reality checking processes, and the testing and tracking of the OERs in use. These criteria will be based on best practice from the literature and from the Beyond Distance Research Alliance's research, as well as context-specific criteria for the various disciplines and types of OERs produced.

Table 7: OTTER Project Quality Plan

Output	A structured and coherent collection of high quality, up-to-date OERs equivalent to at least 360 credits				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
May – Jul 09	Under development (WP2 - Materials collection)	OERs are matched against criteria determined in WP2 (Materials collection)	Set of OERs that meet the stated criteria	OER evaluator.	
Sep 09–Feb 10		Validation by partners (WP5)		OTTER team does ongoing quality monitoring on an operational level.	
Nov 09- Feb 10		Reality check by students (WP6)	Reports on findings from activities undertaken in each of the relevant WPs, supported by data in the form of feedback and comments from partners, students, Steering Group members and other users of the OERs	Partners check and validate OERs.	
Jan-Mar 10		Testing (WP7) and tracking of volume and use of OERs (WP8)		Steering Group provides direction on strategic aspects of quality. Project Director takes overall responsibility for quality.	

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Output	A sustainable model for the release of existing learning materials as OERs at team, departmental and institutional levels.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
March 2010	Under development (WP2 - Materials collection)	<ul style="list-style-type: none"> ▪ Earlier research into OER workflows and capacity building ▪ University of Leicester-specific requirements limitations ▪ Experience and expertise accrued during OTTER and its sister projects 	<p>Evidence-based response to:</p> <p>Is the proposed model sustainable, adaptable and transferable?</p>	<p>OTTER team</p> <p>OTTER partners</p> <p>Project Director</p>	

Output	Piloted processes to provide evidence for institutional policy changes and support for the release of open resources, with usable documentation for transferability.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
March 2010	Under development (WP2 - Materials collection)	<ul style="list-style-type: none"> ▪ Earlier research into OER workflows and capacity building ▪ University of Leicester-specific requirements limitations ▪ Analysis of current policies on OERs at University of Leicester ▪ Experience and expertise accrued during OTTER and its sister projects 	<p>Evidence-based response to:</p> <p>Is the proposed model sustainable, adaptable and transferable?</p>	<p>OTTER team</p> <p>OTTER partners</p> <p>Project Director</p>	

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Output	A set of standards, processes and policies to support the continuation and extend the volume and quality of the release and dissemination of OERs by teams, departments and the university.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
March 2010	Under development (WP2 - Materials collection)	<ul style="list-style-type: none"> ▪ Earlier research into OER workflows and capacity building ▪ University of Leicester-specific requirements limitations ▪ Analysis of current policies on OERs at University of Leicester ▪ Experience and expertise accrued during OTTER and its sister projects 	Have the proposed standards, processes and policies been endorsed by departments, colleges and by the university?	OTTER team OTTER partners Steering Group Project Director	

Output	Evidence of use of OERs, including user cases with feedback.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
From Dec 2009	Under development (WP2 - Materials collection)	<ul style="list-style-type: none"> ▪ Data from OER testing ▪ Feedback from users 	<ul style="list-style-type: none"> ▪ Have OERs been used? By whom and for what purpose? ▪ User cases 	OTTER team	

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Output					
Guidance, documentation and check-lists to support the release of future OERs.					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
From March 2010	Under development (WP2 - Materials collection)	<ul style="list-style-type: none"> ▪ Analysis of current policies on OERs at University of Leicester ▪ Experience and expertise accrued during OTTER and its sister projects ▪ Validation of reports and guidance documents with stakeholders 	<ul style="list-style-type: none"> ▪ Guidance documents and check-lists in usable formats 	OTTER team	

Output					
A comprehensive OTTER interactive website.					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
From May 2009	Widest possible dissemination of the project and its outputs	<ul style="list-style-type: none"> ▪ Production of website ('public face' of the project) following agreed web standards and usability criteria 	<p>Site already live (www.le.ac.uk/otter)</p> <p>Blog available at http://projectotter.wordpress.com/</p>	OTTER team	

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Output	Reports to the funders.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
As required by funders (interim and final reports)	As agreed with funders		Reports approved and disseminated	OTTER team and funders	

Output	A minimum of two academic papers for submission to refereed journals and four conference papers presented within 18 months of the start of the project.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
From March 2010	<ul style="list-style-type: none"> ▪ Journal type ▪ Nature and quality of articles 	<ul style="list-style-type: none"> ▪ Production of articles following agreed academic standards 	Publication	OTTER team Project Director	

Output	Three OER awareness-raising events involving University of Leicester staff and students.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
From Sept 2009	<ul style="list-style-type: none"> ▪ Widest possible dissemination of the project and its outputs at University of Leicester 	<ul style="list-style-type: none"> ▪ Planning, running, monitoring and collecting feedback on each event 	Three successful events at University of Leicester	OTTER team Project Director	

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Output	An end-of-project OER symposium, in coordination with JISC and the HE Academy.				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
April-June 2010	<ul style="list-style-type: none"> ▪ Widest possible dissemination of the project and its outputs across the sector 	<ul style="list-style-type: none"> ▪ Planning, running, monitoring and collecting feedback from the symposium 	Symposium successfully run	OTTER team Project Director Funders	

18. Dissemination Plan

Dissemination will be far-reaching via a blend of face-to-face events and online methods (Table 8). Beyond Distance Research Alliance has an exceptionally strong record of effective dissemination of all its externally-funded projects nationally and internationally. The main target groups are academics, information librarians, learning technologists, managers, administrators in HE and FE, and members of the JISC/HE Academy community.

Timing	Dissemination Activity	Audience	Purpose	Key Message
30 April 2009 onwards	Online: OTTER website from Day 1 to provide public visibility and project updates. OTTER presence on Beyond Distance Research Alliance's Second Life island.	<ul style="list-style-type: none"> HE and FE learners and tutors The HE sector Current & prospective University of Leicester students General public 	To provide public visibility and project updates.	What OTTER is, what it does, why it is relevant, findings, models, deliverables, etc.
Ongoing throughout project lifecycle	Internal events: <ul style="list-style-type: none"> Beyond Distance Research Alliance internal programme of workshops and seminars, library seminars and departmental events. Three 'OER awareness-raising events' involving Leicester staff and students. 	<ul style="list-style-type: none"> Internal project partners University of Leicester library University of Leicester's Senior Management Team Current & prospective University of Leicester students 	To exchange and transfer project processes and outcomes	How OTTER OERs can contribute to the academic community and inform further development and research
Ongoing throughout project lifecycle	External events: <ul style="list-style-type: none"> JISC and HE Academy project events Contributions to relevant discipline-based conferences Contributions to library and information services conferences in 2010/11 Beyond Distance Research Alliance annual conferences (January 2010 and 2011) Beyond Distance Research Alliance external programme of open seminars Contributions to e-learning conferences nationally and internationally (e.g. ALT-C, EDEN, OnlineEduca Berlin) Contributions to the wider JISC and HE Academy programme of events National and international keynote speeches An end-of-project OER symposium, in coordination with JISC and the Academy. 	<ul style="list-style-type: none"> HE and FE learners and tutors The HE sector Current & prospective University of Leicester students Members of the JISC/HE Academy community OTTER's 'sister' projects General public 	<p>To provide public visibility and project updates.</p> <p>To exchange and transfer project processes and outcomes</p> <p>To enable others to adapt and adopt OTTER models</p> <p>To transfer lessons learned</p>	
In preparation, May 09	Journals: Two articles for publication in a suitable peer-reviewed journal (e.g. ALT-J, BJET).	<ul style="list-style-type: none"> The HE sector 	To provide research evidence in usable formats through well-established channels	

Ongoing	Information sharing with public policy bodies	<ul style="list-style-type: none"> HE Academy Council and Board –Prof Salmon 	To inform and shape HE policy and strategy	
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Table 8: Dissemination plan

Additionally, the OTTER team will be in contact with the project partners for further dissemination channels.

19. Exit and Sustainability Plans

Table 9 shows the project's exit and sustainability plans.

Project Outputs	Action for Take-up & Embedding	Action for Exit
High quality, up-to-date OERs equivalent to at least 360 credits (Table 1) and in appropriate formats, with their relevant metadata, from 8 University of Leicester departments, openly available through appropriate channels for free use and repurposing, under an open licence and in perpetuity.	<p>Ongoing internal and external dissemination of OERs and OPRs (Open Pedagogical Resources)</p> <p>Ongoing interaction with partners and users; incremental integration of feedback into model for OER development and release</p>	Publication and dissemination of OERs
A sustainable model for the release of existing learning materials as OERs at team, departmental and institutional levels.	University of Leicester will be used as a case study and exemplar including the wide range of institutional processes involved, internal partnerships and implementation through University of Leicester's new Learning Innovation Strategy (likely to be accepted by the University of Leicester Senate in July 2009).	Publication and dissemination of model and ongoing use at Leicester
Piloted processes to provide evidence for institutional policy changes and support for the release of open resources, with usable documentation for transferability.	<p>Ongoing interaction with institutional partners and University of Leicester's Senior Management Team</p> <p>Incremental integration of feedback into model for OER development and release</p>	Publication and dissemination of lessons learnt from pilot
A set of standards, processes and policies to support the continuation and extend the volume and quality of the release and dissemination of OERs by teams, departments and the university.	Ongoing interaction with institutional partners and University of Leicester's Senior Management Team	Publication and dissemination of standards, processes and policies developed
Evidence of use of the OTTER OERs, including user cases with feedback.	Implementation of WP5 (Validation with partners), WP6 (Reality check by students) and WP7 (Release & testing)	Publication and dissemination of evidence of use
Guidance, documentation and check lists to support the release of future OERs.	Team members to report on progress/developments at Project Meetings and Steering Group Meetings	Publication and dissemination of documentation and check lists, as appropriate
A comprehensive OTTER interactive website.		
A minimum of two academic papers for submission to refereed journals and four conference papers presented within 18 months of the start of the project.		
Three OER awareness-raising events involving University of Leicester staff and students.		
An end-of-project OER symposium, in coordination with JISC and the HE Academy.		
		Synthesis, dissemination and publication of key points and lessons learned

Table 9: Exit and sustainability plans

Table 10 shows the outputs that may have potential to live on after the project ends, why, how they might be taken forward, and any issues involved in making them sustainable in the long term.

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
OERs equivalent to at least 360 credits (Table 1) and in appropriate formats, with their relevant metadata, from 8 University of Leicester departments.	<p>The OERs will be created out of existing materials that have been tested and refined by staff at University of Leicester over a number of years.</p> <p>The OERs will be openly available through appropriate channels – JorumOpen, Plone, EvidenceNet, Second Life and other publicly available channels for free use and repurposing, under an open licence and in perpetuity.</p>	Through further research involving other disciplines, programmes, levels of study and technologies	<p>New research questions emerging from OTTER.</p> <p>Copyright and IPR issues emerging at various stages of the project.</p> <p>Changes to copyright and IPR legislation.</p> <p>Transferring lessons learned to the international context.</p>
A sustainable model for the release of existing learning materials as OERs at team, departmental and institutional levels.	Informed by data gathered during the validation, reality checking, testing and tracking phases. (WP 5, 6, 7 and 8)	Application of systems, processes and model(s) developed	
Piloted processes to provide evidence for institutional policy changes and support for the release of open resources	Usable documentation for transferability will be produced.	Questions for further research to be identified during OTTER project lifecycle	
A set of standards, processes and policies to support the continuation and extend the volume and quality of the release and dissemination of OERs by teams, departments and the university.	Informed by data gathered during the validation, reality checking, testing and tracking phases. (WP 5, 6, 7 and 8)	Application of standards, processes and policies developed	
Evidence of use of the OTTER OERs, including user cases with feedback.	Applicable to similar OER projects in HE and other sectors	Questions for further research to be identified during OTTER project lifecycle	
Guidance, documentation and check lists to support the release of future OERs.			
A comprehensive OTTER interactive website.	Low cost, high impact	Following the end of the project, the website will be maintained for at least 5 years	

Table 10: Outputs that will live on beyond the end of OTTER

Appendices:

1. **Appendix A. Project Budget**
2. **Appendix B. Workpackages**
3. **Appendix C. References**

Appendix A. Project Budget

Directly Incurred Staff	30.4. 09 – 29.4.10	TOTAL £
OER Evaluator Grade6 Pt32, 1 yr @ 100% FTE		
Copyright Administrator Grade5 Pt22, 1 yr at 100% FTE		
Project Coordinator Grade7 Pt35, 1 yr @60%FTE		
Learning technologist Grade6 Pt30, 1 yr @ 100% FTE		
Learning technologist Grade6 Pt30, 9 mths @ 100%FTE (effective FTE= 75%)		
Total Directly Incurred Staff (A)	£163,046.00	£163,046.00
Non-Staff	30.4. 09 – 29.4.10	TOTAL £
Travel and expenses		
Travel for Steering Group members (1 external member for 2 visits @ £100)	£200.00	£200.00
Travel for project staff to programme level activity (@ £500 in Yr 1)	£500.00	£500.00
IPR-related training courses for project team members	£1,500.00	£1,500.00
Incentives for students trialling OERs (16 students x £25 Amazon vouchers)	£400.00	£400.00
Hardware/software		
Content licensing and preparation costs @ £20000 (See Section 1.5 a. of this project plan.)	£20,000.00	£20,000.00
Dissemination		
Online dissemination media set-up (build website, blog and wiki)	£300.00	£300.00
Conference dissemination (2 staff to 2 conferences @ £700)	£2,800.00	£2,800.00
End-of-project Symposium for institutions participating in JISC Programme	£1,000.00	£1,000.00
Evaluation		
External Evaluator's fees @ £500 per day for 4 days over Yr 1	£2,000.00	£2,000.00
Other (Room and Refreshments)		
For Steering Group meetings (2 meetings in 1 Yr @ £125 / meeting)	£250.00	£250.00
Total Directly Incurred Non-Staff (B)	£28,950.00	£28,950.00
Directly Incurred Total (C) (A+B=C)	£191,996.00	£191,996.00
Directly Allocated	30.4. 09 – 29.4.10	TOTAL £
Staff		
Dr Alejandro Armellini, Project Director - 20% FTE		
Richard Mobbs, Head of E-Learning Advocacy - 5% FTE		
Dr Mark Pluciennik, Archaeology - 5% FTE		
Dr Pam Rogerson-Revell, Education - 5% FTE		
Prof Gilly Salmon, Beyond Distance Research Alliance - 10% FTE		
Dr Palitha Edirisingha, Beyond Distance Research Alliance - 5% FTE		
Mr Ian Snaith, Law - 5% FTE		

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Dr Simon Rofe, Politics - 5% FTE		
Dr Ray Randall, Psychology - 5% FTE		
<i>Mr Derek Cox, Staff Development - 5% FTE</i>		
<i>Mr Paul Jackson, Director of Student Support & Development - 5% FTE</i>		
Estates - at the rate £6823 per 1.00 FTE (total 4.95 FTEs)	£33,773.85	£33,773.85
Other	£0.00	£0.00
Directly Allocated Total (D)	£86,252.85	£86,252.85
Indirect Costs (E) - at the rate £39,206 per 1.00 FTE (total 4.95 FTEs)	£194,069.70	£194,069.70
Total Project Cost (C+D+E)	£472,318.55	£472,318.55
Amount Requested from JISC is C + 20% of [D+E] =£191,996 + £56,064.51	£248,060.51	£248,060.51
Institutional Contributions	£224,258.04	£224,258.04
Percentage Contributions over the life of the project	JISC %	Institution %
	52.5	47.5
No. FTEs used to calculate indirect and estates charges, and staff included		No. of FTEs
A cumulative of 4.95 FTEs has been used to calculate estates and indirect costs (<i>Staff in italics not included as they are not members of Academic staff at the University</i>)		4.95

Appendix B. Workpackages

Project start date: 1 May 2009 (Month 1)
 Project completion date: 30 April 2010 (Month 12)
 Duration: 12 months

Overview of planned workpackages and progress to date

	WORKPACKAGES	<i>Month</i>	1	2	3	4	5	6	7	8	9	10	11	12	Achievements to date (29 May 2009)
1	Project management and set-up														<ul style="list-style-type: none"> • First Project Meeting held on 27/05/09 • First Steering Group Meeting held on 28/05/09 • All staff bar 1 recruited & inducted
2	Collection of existing digital material from all partners														Material collection under way
3	Clearance of rights														Work on developing a workflow for rights clearance has begun
4	Formatting and standardisation														Work on formatting and standardisation already under way
5	Validation with partners														
6	Reality check by students														
7	Release and testing														
8	Tracking														
9	Analysis of lessons learned														
10	Dissemination														OTTER website set up and blog activated.
11	Project evaluation and sustainability														Appointment of external evaluator agreed.

NB: Boxes shaded lighter indicate continuing activity or work following initial start-up / intensive activity

Workpackages – detailed breakdown

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 1: Project management and set-up					
<u>Objective:</u> Completion of project start-up, establishing governance processes.					
1. Project set-up, recruitment, induction and training	30/04/09	31/05/09	All recruitment and induction, scheduled for this WP, completed. All project staff (bar 1) in post.	First Project group meeting Held 27/05/09	Project Director, Strategic Lead
2. Steering and project group meetings	30/04/09	31/05/09	All project related meetings (Project group and Steering group meetings) scheduled	First Steering group meeting held 28/05/09	Project Director
3. JISC Programme level activity and reporting to funder	30/04/09	31/05/09	Participation in JISC Support & Synthesis Programme events	Project Website Template (submitted 25/05/09) Project Plan Draft (submitted 29/05/09) Programme Launch 09/06/09 Final Project Plan 30/06/2009	Project Director
WORKPACKAGE 2: Collection of existing digital material from all partners					
<u>Objective:</u> Digital content collected and categorised. Volume, complexity and context-specific requirements for the OERs identified.					
4. Collect and categorise OERs	01/05/09	31/07/09	Clear understanding of the volume, complexity and requirements of the OERs	Sharing of information at Interim Meeting, 20/10/09 Interim progress report, 09/11/09	Project Coordinator
5. Identify and resolve 'gaps' in OER collection.	01/05/09	31/07/09			Project Coordinator
6. Review OERs and determine volume, complexity and requirements for processing them.	01/05/09	31/07/09			Project Coordinator

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
7. Determine quality criteria for OERs	01/05/09	31/07/09	List of quality criteria for OERs to be checked against		OER Evaluator
WORKPACKAGE 3: Clearance of rights					
Objective: Digital content 'clean' and ready for use					
8. OERs reviewed for possible IPR issues	01/05/09	29/02/10	Sign off agreements	Sharing of interim findings at Interim Meeting, 20/10/09	Copyright Administrator
9. Attributions inserted where required	01/06/09	29/02/10		Interim progress report, 09/11/09	Copyright Administrator
10. Permissions obtained and payments made where necessary	01/06/09	29/02/10			Copyright Administrator
WORKPACKAGE 4: Formatting and standardisation					
Objective: Digital content technically ready for release					
11. Content formatted with appropriate metadata and tagging	01/06/09	29/02/10	Content formatted for interoperability across a range of OER repositories (e.g. JorumOpen, Plone, EvidenceNet)	Sharing of interim findings at Interim Meeting, 20/10/09	Learning technologist
12. OERs produced following team's quality criteria for usability (WP2 - Materials collection, item 3)	08/06/09	29/02/10	The design and navigational structure of the OERs follows best practice	Interim progress report, 09/11/09	Learning technologist
13. Search function on University of Leicester's Plone site developed	01/05/09	29/02/10	Materials are searchable on all platforms, including University of Leicester's Plone site		Learning technologist
WORKPACKAGE 5: Validation with partners					
Objective: Digital resources checked for release					

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Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
14. All contributing partners review the formatted OERs and submit feedback	01/07/09	29/02/10	Sign-off from partners Steering Committee's approval noted in meeting minutes	Sharing of interim findings at Interim Meeting, 20/10/09 Interim progress report, 09/11/09	Project Coordinator
15. A sample of OERs is reviewed by Steering Committee	01/09/09	29/02/10			Project Director
16. Changes made as required	08/09/09	29/02/10			Learning Technologist
17. Partners sign off completed OERs	15/09/09	29/02/10			Project Coordinator
WORKPACKAGE 6: Reality check by students					
Objective: Digital content 'reality-checked' for release					
18. Students in relevant subjects try the materials and give feedback.	01/11/09	28/02/10	Internal report to project partners and Steering Group	Interim progress report, 09/11/09	OER Evaluator
19. Feedback is obtained from other online users	01/11/09	28/02/10			OER Evaluator
20. Changes made as required, in consultation with project partners where necessary.	01/12/09	28/02/10			Learning Technologist
21. Project partners and Steering Group informed of changes made.	01/01/10	28/02/10			Project Coordinator
WORKPACKAGE 7: Release and testing					
Objective: Digital content published and tested					
22. Publication of digital content and associated metadata on JorumOpen, Plone and other repositories (See Item 9: Technical Development)	01/12/09	31/03/10	Digital content fully functional on JorumOpen, Plone and other repositories	Draft final report, 01/03/10 Final report 26/04/10	Learning Technologist
23. Testing and liaison with repository owners to ensure that all functions work as required	01/12/09	31/03/10			Learning Technologist

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 8: Tracking					
<u>Objective:</u> Indication for OER use and areas for further development					
24. In discussion with funders, tracking of volume and use of OERs			Reports to departments, university and funders on volume and use of OERs	Draft final report, 01/03/10 Final report 26/04/10	OTTER Evaluator, Strategic Lead
WORKPACKAGE 9: Analysis of lessons learned					
<u>Objective:</u> Reports and deliverables ready for dissemination					
25. Team records activities, events and observations			Blog created and maintained from Day 1.	Draft final report, 01/03/10 Final report 26/04/10	Project Team Project Coordinator Strategic Lead
26. Regular discussions on lessons learned at team meetings, Project Meetings and Steering Committee Meetings			Reports and deliverables ready for dissemination		Project Coordinator Strategic lead
27. Informing University Senior Managers and Committees, impact on University policy			Adoption of OTTER model Embedding in university policy and strategy		Strategic lead
WORKPACKAGE 10: Dissemination					
<u>Objective:</u> Up-to-date website, stakeholder participation, papers, symposia					
28. Project website and blog			Provide public visibility and project updates, which is maintained for 5 years		Project team
29. Dissemination via University of Leicester Media Zoo			Enable exchange and transfer of processes and outcomes both internally to University of Leicester and externally to the sector.		Project Director and Media Zoo-keeper

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Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
30. Events (seminars, workshops and conference) at Beyond Distance Research Alliance and at other participating University of Leicester departments			Disseminate academic outputs <i>via</i> w/shops, symposia, papers & posters	Interim progress report, 09/11/09	Project team
31. JISC and HE Academy programme of events			Disseminate outputs <i>via</i> w/shops, symposia, papers & posters	Draft final report, 01/03/10	Project team
32. Contributions to subject-specific conferences			Disseminate academic outputs <i>via</i> w/shops, symposia, papers & posters	Final report 26/04/10	Departmental teams
33. Contributions to e-learning conferences nationally and internationally (e.g. ALT-C, EDEN, OnlineEduca Berlin)			Disseminate academic outputs <i>via</i> keynote speeches, w/shops, symposia, papers & posters		Project team
34. Publication in peer-reviewed e-learning journals (incl. ALT-J, BJET) and discipline-specific areas from the pilots			At least 2 peer-reviewed articles		Project team
35. Continued open-resource sharing via JorumOpen, University of Leicester's Plone site, EvidenceNet and other public channels			OERs available in open repositories		Project team
36. Contributions to Leicester Research Archive (LRA) - www.le.ac.uk/lra			Suitable material to be lodged in LRA to provide long-term accessibility		Project team
37. Contributions to HE Academy's E-learning Research Observatory			Models and other project outputs to be contributed to HEA-ELRO		Project team
38. Impact on sector			Keynote speeches		Strategic Lead
WORKPACKAGE 11: Project evaluation and sustainability					
Objective: Assess the project's outputs and deliverables against projections made in the bid for measures of success, as well as 'value for money'.					
39. External evaluation (4 evaluation visits over 12 months)			Quarterly evaluation visits followed by reports.	4 reports based on the 6-stage model (Glenaffric) Draft final report, 01/03/10 Final report 26/04/10	Project Director

Project Acronym: OTTER
Version: FINAL
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Date: 30 June 2009

Appendix C. References

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