

# Creating and Publishing OER

WV Library Association  
Academic Division Summer Refresher  
August 1, 2022  
Gena R. Chattin



This work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

# A Production Workflow for OER Projects

Start here

For more information, visit

[oer.iastate.edu](http://oer.iastate.edu)

## Research

Have you explored OER in your subject area?

Yes

No

Consult a librarian

Have you been trained in OER and Copyright?

Yes

No

Are you confident to begin working with OER?

Yes

No

## Pre-production

Have you defined your OER project goals?

Yes

No

Curate existing OER

Create working docs

Plan assessment

Call for volunteers

Do you have enough support?

Yes

No

Consult an OER specialist

## Design

Flesh out OER outline

Scope production

Do you have sufficient resources?

Yes

No

Consult an OER specialist

## Development

Write/revise content

Check IP/Accessibility

Are all major revisions complete?

Yes

No

Consult an OER specialist about publishing options

Format and style

Perform final QA check

Get peer review/feedback

## Publication

Disseminate and share via appropriate channels

Does the OER meet your initial goals?

Yes

No

Consult an OER specialist

Distribute to students

# Start with **RESEARCH**

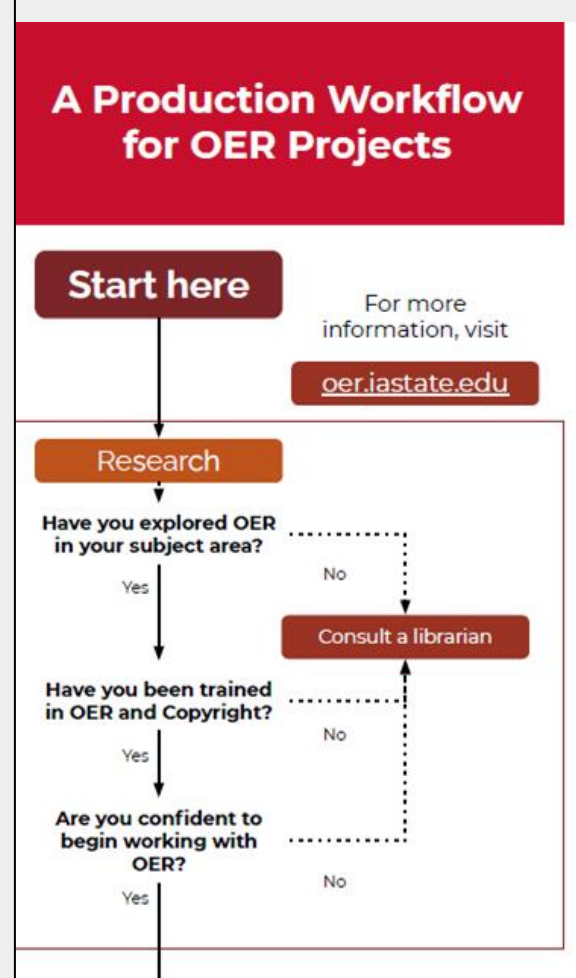
Evaluate existing resources.

Does something already exist?

Is a new resource needed?

Can you adapt or build on  
existing OER?

**Take time to leave reviews!**



# PRE-PRODUCTION

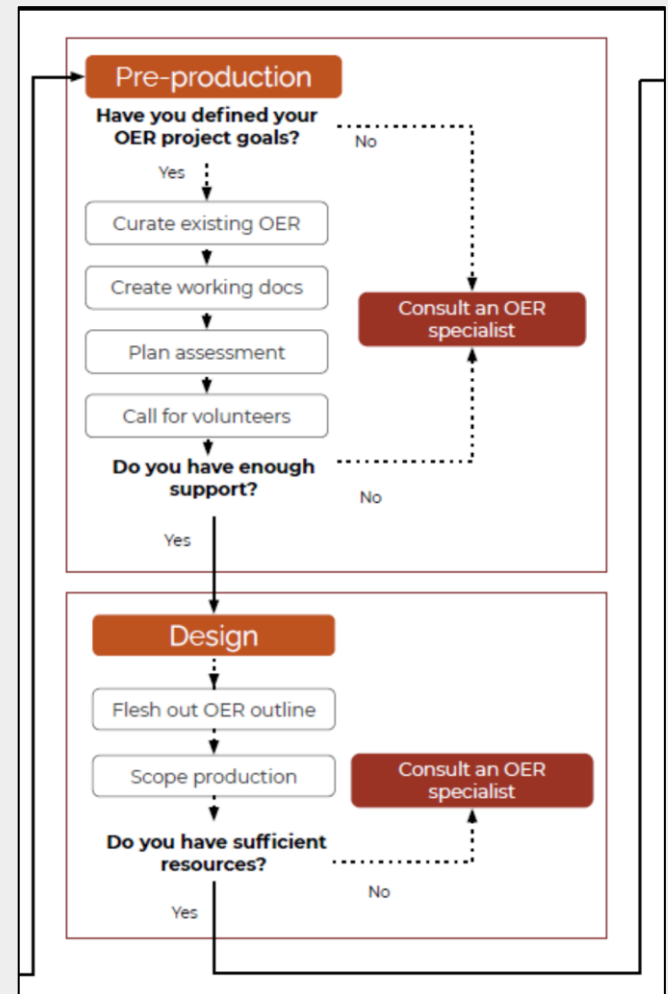
(Skeleton outline stage.)

Define goals, plan, and gather support, including applicable existing OER.

# & DESIGN

(Flesh out outline.)

Outline the work and determine what is needed to produce it. Includes graphic and instructional design work.



# Pre-Production: Planning & Design 1

## AUTHOR INTAKE: AUTHOR(S) GOALS AND VISION

*Authoring Open Textbooks* (Falldin & Lauritsen) describes an “**intake process**” that includes questions to discuss with an OER specialist.

Whether an OER creator works with a specialist or not, they should consider answers to all these questions before beginning work on the project.

## AUTHOR(S) GOALS AND VISION

1. Why do you want to write an open textbook?
2. How does this project fit into your professional and personal goals?
3. Do you intend to include this project in your tenure and promotion process?
4. Briefly describe your project.
5. How do you define your student and faculty audiences?
6. For which courses could your open textbook be used?
7. What textbooks are out there in your field, and how is your vision similar or different?
8. Is there a timeline for this project? Is your subject area impacted by current events?
9. Do you know which open license you'd like to use? The Open Textbook Network and others in the open education community strongly recommend CC BY. The Open Textbook Library no longer accepts no derivatives (ND) textbooks.
10. Do you plan on developing ancillary materials to accompany your textbook?

# Pre-Production: Planning & Design 2

## AUTHOR INTAKE: AUTHORING CONSIDERATIONS

Falldin & Lauritsen mostly talk here about how partners will work together (i.e. co-authors, the University), but the answers to these questions may have large impacts on publishing decisions and even the ability to make your work open at all.

## AUTHORING CONSIDERATIONS

1. How many authors are involved? Are they at different institutions? In which order will authors be listed?
2. If more than one author, how do you imagine working together? For example, will you divide and conquer, or share ownership of each chapter and element?
3. What stage is the project currently in? Is there existing content? If so, what format is it in (e.g., Word, PowerPoint, LaTeX)?
4. Have you defined your textbook's structure, in terms of what elements you'd like to include (e.g., chapter learning objectives, glossary of key terms, chapter exercises)?
5. Have you selected the tool you'd like to use to write your textbooks? Do all of the authors have access to the tool?
6. Have you signed a Memorandum of Understanding (MOU) with your institution, if applicable?
7. Are you exploring open pedagogy options? If you're considering involving students as authors, you will want to clarify their rights at the forefront.
8. How will editing work? Do you know who will edit and how changes will be reconciled?

# Pre-Production: Planning & Design 3

## AUTHOR INTAKE: PUBLISHING CONSIDERATIONS and SHARING YOUR TEXTBOOK

Falldin & Lauritsen then get into the nuts and bolts of what it will take to produce your open materials and make them available.

### PUBLISHING CONSIDERATIONS

1. Are there particular formats (PDF, EPUB, for example) you'd like to produce, considering both student needs and institutional needs?
2. Does your textbook require a significant number of tables, graphs, images, formulas, or unique typesetting challenges?
3. Is any of the existing content copyrighted by other people?
4. Do you want to include peer review in the authoring process? If so, some faculty ask colleagues for reviews that can be included in the front matter of the textbook.

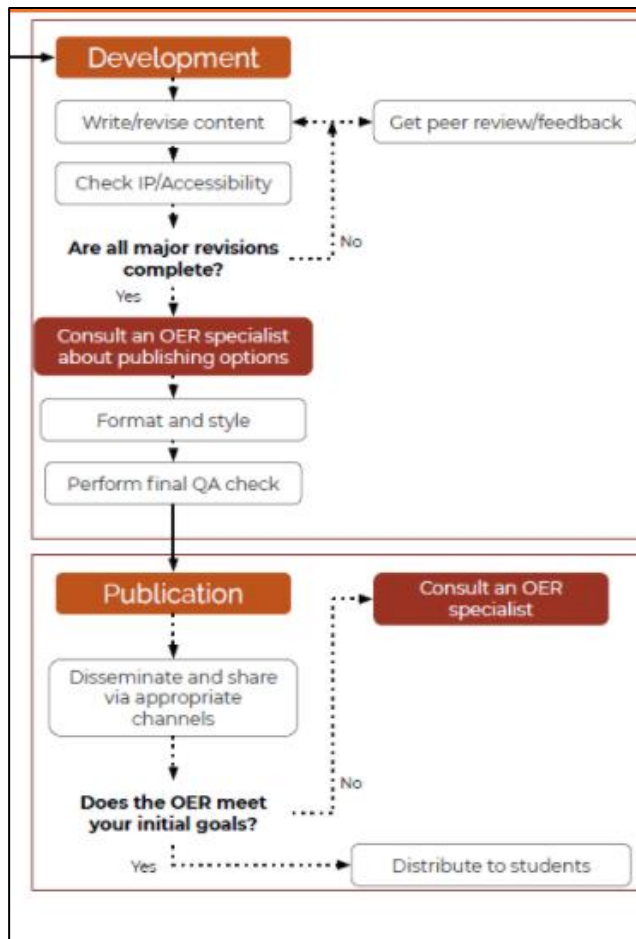
### SHARING YOUR TEXTBOOK

1. How and where will you make your textbook available?
2. Consider adding your textbook to stable locations where your textbook can be accessed including your institutional, statewide or disciplinary repositories.
3. If your textbook is included in the Open Textbook Library, other faculty may review it using a provided rubric.

Once you have determined what you want to create and what you will need to do so...

## DEVELOPMENT

- Create and format content (aka actually write the thing).
- QA: Proofread, check IP (intellectual property) rights, check accessibility, etc.



## PUBLICATION & DISTRIBUTION

- Publish in final format(s)
- Distribute and make searchable
- Distribute to students
- Update and re-distribute as necessary



# Development

Once you have determined what you want to create and what it will take to create it in the Planning and Design phases, it's time to do the writing and choose all the right tools to create your OER masterpiece!



- Write / Revise
- Layout, Format, and Style
- Evaluate rights
- Evaluate accessibility

# Tools for Creating Texts (1 of 5)

**Disclaimer:** Inclusion in this list does not mean endorsement.

Many of the tools listed have free, paid, and institutional usage / subscription levels. Some have education pricing.

**Note:** Make sure you understand the terms of use of the tool you're using and **what you are allowed / able to do with the final project** before you start building. Some tools may come with strings (or add some later).

# Tools for Creating Texts (2 of 5)

## The Ubiquitous Two

### Google Docs

- Free and online
- Built for collaboration
- Can upload existing files
- Can save as, export, or print to PDF
- Can export to EPUB

### Microsoft Word

- Not free
- Online collaboration is a bit clunkier
- Can save as or print to PDF

# Tools for Creating Texts (3 of 5)

## More Tools - Low Tech Skill Needed (pt. 1)

### [Adobe Acrobat DC](#)

High-end PDF creator and editor from Adobe. Requires subscription.

### [Content Builder \(MERLOT\)](#)

Allows you to create OER as a website based on a variety of templates. Requires you to create a free account. You can download this as a “Common Cartridge,” which downloads as a .imsc file that can theoretically be imported into an LMS (i.e. Canvas, etc. but NOT Google Classroom).

### [LibreOffice Writer](#)

The word processor portion of the free, open-source LibreOffice suite (formerly known as OpenOffice).

### [OpenAuthor \(OER Commons\)](#)

Creates more traditional textbooks in a variety of document and eBook formats. Fairly easy and straightforward to use. Requires you to create a free account.

# Tools for Creating Texts (4 of 5)

## More Tools - Low Tech Skill Needed (pt. 2)

### [Pressbooks Authoring & Editing Platform](#)

Adapt existing OER for your classroom or create new materials. Add math notation, embed multimedia, interactive elements, and assessment using H5P. Conforms with accessibility standards. Read online or export as PDF, EPUB, Common Cartridge, XML, and more.

### [Scrivener](#)

Can generate eBook (Kindle or EPUB) or PDF format. Costs \$49 with Educational License pricing at \$41.65

### [Soda PDF](#)

Acrobat alternative. Includes many of the most useful PDF editing features (i.e. merge, compress, edit, convert, split, etc.). There are online (use through Web browser) or desktop application versions available.

# Tools for Creating Texts (5 of 5)

## Higher Tech Skill Needed

(When you need more than just flat text... AND you have the technological skills to make it happen)

### [GitBook](#)

Build centralized, collaborative documents such as product/project documentation, knowledge bases, etc. in addition to online textbooks. May require a bit more skill and knowledge of GitHub to use.

### [Bookdown](#)

Write HTML, PDF, EPUB, and Kindle books with R Markdown. Requires comfort using R Markdown or willingness to learn. The Bookdown package is an open-source R package.

### [Jupyter Notebook](#)

Allows you to create and share documents containing live code, visualizations, equations, text, etc.

# Graphics Tools

(If you don't have Adobe Creative Cloud or a comparable toolset...)

## [Canva](#)

Online, subscription-based design tool. Includes clip art and stock photos. Very user-friendly.

## [GNU Image Manipulation Program \(GIMP\)](#)

Free and open-source image editor. Comparable to Adobe Photoshop.

## [Inkscape](#)

Free and open-source vector graphics editor.

## [LibreOffice Draw](#)

Free and open-source vector graphics editor. Lets you sketch and draw, create flowcharts and diagrams, and create photo albums and picture galleries.

# Evaluating and Assigning Rights



- Intellectual property (IP) Policies at Your Institution
- Licensing and Rights Status of Any Materials You Want to Use
- ...and How to Indicate It in Your Work
- Assigning Rights and Licensing Status to Your OER Work



# Intellectual Property (IP) Policies at your institution

- Know your institution's intellectual property (IP) policies.
- How might they hinder or help OER creation and distribution?
- (You may want to consult your institution's general counsel.)

# Sample IP Policy: WVU

**IP Policy, West Virginia University:**

**<https://techtransfer.research.wvu.edu/inventor-resources/ip-policy>**

**BOG Governance Rule 1.5 – Intellectual Property Rule for Patent, Copyright, and Trademark Rights**

**<https://policies.wvu.edu/finalized-bog-rules/bog-governance-rule-1-5-intellectual-property-rule-for-patent-copyright-and-trademark-rights>**

**Copyright Ownership Flowchart:**

**<https://techtransfer.research.wvu.edu/inventor-resources/ip-policy/copyright-ownership-flowchart-figure>**

# Evaluate Rights and Licensing Status of Materials Used in Your Work

Whether you're inserting a photo or other media, citing a text, or remixing an entire OER for your own purposes, it's important to evaluate its rights status, and **document your work** in case your use is ever challenged.

## Some Types of IP Rights to Consider (Not All)

- **Copyright**
  - Public Domain, Fair Use, Creative Commons, etc.
- **Trademark**
  - i.e. Mickey Mouse, Starbucks logo, Company names, etc.
- **Publicity and Privacy**
  - (State-level law, not all states have this)
  - i.e. advertising, commercial uses, modeling, etc.
- **Patents**

More IP rights info: World Intellectual Property Organization (WIPO), "What is Intellectual Property?" - <https://www.wipo.int/about-ip/en/>

# Resources for Evaluating Copyright Status

Many tools, but some of the most useful are at:

## [Stanford University Libraries Copyright & Fair Use Charts and Tools](#)

Includes links to the most useful tools for evaluating rights status of most types of media pertaining to their use in a university setting.

## [Some featured tools linked from this page:](#)

- [Copyright Term and the Public Domain in the United States, Peter Hirtle, Cornell University](#)  
Authoritative chart identifying copyright status based on type of material, creation date, publication status, etc. (Sound recording status is esp. tricky.)
- [Fair Use Checklist, Columbia University Libraries](#)  
Helps determine whether a use truly counts as fair use. Also documents your decision-making process in case a use is challenged.
- **Best Practices statements** for various disciplines, types of materials.

# Remember...



Just because something is free (and / or freely available on the Internet) does not mean that it is free or even available for reuse.

You **must** determine its rights status and what the terms of its use are. Mere attribution is not enough.

But when you've cleared it for reuse, here's how you attribute it...

# Citation vs. Attribution (1)

“A **citation** allows authors to provide the source of any quotations, ideas, and information that they include in their own work based on the copyrighted works of other authors.”

---

“Attribution is the cornerstone condition when using a resource or text released with an open-copyright licence. This legal requirement states that users must attribute — give credit — to the creator of the work.”

“An **attribution statement** is used to provide credit to the original creator; its purpose is similar to a citation. Best practice says that the statement should include the title of the work, name of the creator, and licence type (with links to each).”

# Citation vs. Attribution (2)

Citation	Attribution
Academic and legal purposes (plagiarism and copyright infringement).	Legal purposes (e.g., rules of Creative Commons licences).
The rights of the copy (meaning copyright) are <b>NOT</b> shared with the general public by the copyright holder.	Copyright <b>IS</b> shared with the general public by the copyright holder by marking the work with an open-copyright licence.
Protects an author who wants to refer to a restricted work by another author.	Author of an open work has given advanced permissions to use their work.
Used to quote or paraphrase <b>a limited portion</b> of a restricted work.	Used to quote (or paraphrase) <b>all or a portion</b> of an openly licensed work.
Can paraphrase, but cannot change work without permission.	Author has give advanced permission to change work.
Many citation styles are available: APA, Chicago, MLA.	Attribution statement styles are still emerging, but there are some defined best practices.
A reference list of cited resources are typically placed at the end of the book.	Attribution statements are found on the same page as the resource.

## Citation vs. Attribution

SOURCE: [BCcampus Open Education Self-Publishing Guide](#) by Lauri M. Aesoph is licensed under a [Creative Commons Attribution 4.0 International License](#), except where otherwise noted.

# Citation vs. Attribution (3)

How to create an attribution?

- **Open Attribution Builder (Open Washington)**  
**<http://www.openwa.org/open-attrib-builder/>**  
Automated attribution generator. Fill out the form and paste the generated attribution into your work where appropriate.

For more information, see also:

- **“Chapter 25: Resources: Captions and Attributions,” BCcampus Open Education Self-Publishing Guide, Lauri M. Aesoph.**



# Assigning Rights / Licensing Status to Your OER Work

Which status to assign?

1. Let's revisit our 5 R's. We're trying to create something Open, after all.
2. Let's also revisit our institution's IP policies...
3. Then let's choose the best Creative Commons license.

(Keep in mind that some repositories - such as the Open Textbook Network - may require a certain Creative Commons license. Whether or not you assign rights that comply is up to you.)












# ...BUT FIRST!

There are some things you should know before assigning a CC license:

- **You cannot revoke it.** Once you have assigned a license, it applies to that work forever, and anyone using it in accordance may continue to do so, even if you stop distributing the work.
- **You must be the copyright holder** to legally assign a CC license **or have permission from the copyright holder.**
  - **If you created the work as part of your full-time job,** you may not be the copyright holder. (**Work for Hire**)

SOURCE: "[About CC Licenses](#)," Creative Commons.

# CC LICENSE ELEMENTS

	CC: Creative Commons		
	BY: Attribution		
	NC: Non-Commercial		
	SA: Share Alike		
	ND: No Derivatives		

# Six Creative Commons License Types (1)

Choose one of the six CC licenses or the public domain dedication, as described below and **on the Creative Commons website**:



## CC Attribution 4.0 International

**CC BY:** This license allows reusers to distribute, remix, adapt, and build upon the material in any medium or format, so long as attribution is given to the creator. The license allows for commercial use.

CC BY includes the following elements:



 BY – Credit must be given to the creator



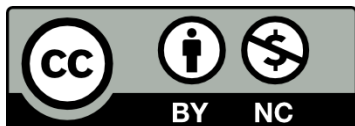
## CC Attribution-ShareAlike 4.0 International

**CC BY-SA:** This license allows reusers to distribute, remix, adapt, and build upon the material in any medium or format, so long as attribution is given to the creator. The license allows for commercial use. If you remix, adapt, or build upon the material, you must license the modified material under identical terms.

CC BY-SA includes the following elements:

-  BY – Credit must be given to the creator
-  SA – Adaptations must be shared under the same terms



# Six Creative Commons License Types (2)

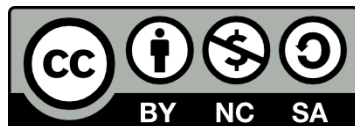


## CC Attribution-NonCommercial 4.0 International

**CC BY-NC:** This license allows reusers to distribute, remix, adapt, and build upon the material in any medium or format for noncommercial purposes only, and only so long as attribution is given to the creator.

### CC BY-NC includes the following elements:




-  BY – Credit must be given to the creator
-  NC – Only noncommercial uses of the work are permitted



## CC Attribution-NonCommercial-ShareAlike 4.0 International

**CC BY-NC-SA:** This license allows reusers to distribute, remix, adapt, and build upon the material in any medium or format for noncommercial purposes only, and only so long as attribution is given to the creator. If you remix, adapt, or build upon the material, you must license the modified material under identical terms.

### CC BY-NC-SA includes the following elements:

-  BY – Credit must be given to the creator
-  NC – Only noncommercial uses of the work are permitted
-  SA – Adaptations must be shared under the same terms



# Six Creative Commons License Types (3)



## CC Attribution-NonCommercial-NoDerivatives 4.0 International

**CC BY-ND:** This license allows reusers to copy and distribute the material in any medium or format in unadapted form only, and only so long as attribution is given to the creator. The license allows for commercial use.

CC BY-ND includes the following elements:




-  BY – Credit must be given to the creator
-  ND – No derivatives or adaptations of the work are permitted



## CC Attribution-NonCommercial-NoDerivatives 4.0 International

**CC BY-NC-ND:** This license allows reusers to copy and distribute the material in any medium or format in unadapted form only, for noncommercial purposes only, and only so long as attribution is given to the creator.

CC BY-NC-ND includes the following elements:

-  BY – Credit must be given to the creator
-  NC – Only noncommercial uses of the work are permitted
-  ND – No derivatives or adaptations of the work are permitted

# The Creative Commons Public Domain Dedication



**CC0** (aka **CC Zero**) is a public dedication tool, which allows creators to give up their copyright and put their works into the worldwide public domain. CC0 allows reusers to distribute, remix, adapt, and build upon the material in any medium or format, with no conditions.

# Creative Commons License Chooser

<https://creativecommons.org/choose/>

The screenshot shows the Creative Commons License Chooser interface. At the top, there is a navigation bar with the Creative Commons logo, a search bar, and links for Global Network, Newsletters, Store, Contact, and social media icons. Below the navigation bar, there is a header with the text "Help us build a vibrant, collaborative global commons" and a "Donate Now" button. A green box contains a message about testing a new version of the License Chooser. Below this, there are links for "New to Creative Commons?" and "Explore the Creative Commons licenses.". The main content area is divided into two panels. The left panel, titled "License Features", has the heading "Allow adaptations of your work to be shared?" and three radio button options: "Yes" (selected), "No", and "Yes, as long as others share alike". The right panel, titled "Selected License", shows the "Attribution-NonCommercial 4.0 International" license with its corresponding icons (CC, person, and crossed-out dollar sign) and a note that it is not a Free Culture License.

Can't figure out which license to use?

Fill out the form based on what you want and don't want, and the License Chooser will select the correct Creative Commons license for your work!

It even generates code you can use to embed the license text into a website.



# Evaluate the Accessibility of your OER Work

There are many considerations and many useful tools. Here are a few places where you can start and feel comfortable that you've created an accessible work.

## *BCcampus Open Education Accessibility Toolkit*

Covers key concepts and best practices that will help OER creators develop materials accessible to the widest audience possible.

- **“Appendix A: Checklist for Accessibility”**  
Checklist covers the basics, including how to handle content organization, images, links, tables, multimedia, formulas, and font size. A very useful tool for anyone new to accessibility considerations.

## **COOL4ED eTextbook Accessibility Reviews**

A methodology for evaluating the accessibility of your OER work. Includes a list of 15 checkpoints as well as manuals and tutorials.

Your institution's **office of accessibility services / disability services** may also be a helpful resource if they have the staff and time.

# Think about Universal Design

[Universal Design Principles](#) and [Universal Design in Instruction](#) from the University at Buffalo are great, **practical** sites to help reframe how you think about teaching and accessibility.

## Universal Design Principles

(from the [Center for Universal Design at NCSU](#))

- Equitable Use
  - for “people with diverse abilities”
- Flexibility in Use
  - “accommodates a wide range of individual preferences and abilities”

- Simple and Intuitive Use
  - design is easy to understand and use “regardless of user’s experience, knowledge, language skills, or current concentration level.”
- Perceptible Information
  - communicates information effectively “regardless of ambient conditions or the user’s sensory abilities.”
- Tolerance for Error
  - “The design minimizes hazards and the adverse consequences of accidental or unintended actions.”
- Low Physical Effort
  - “The design can be used efficiently and comfortably and with a minimum of fatigue.”
- Size and Space for Approach and Use
  - “Appropriate size and space is provided for approach, reach, manipulation, and use regardless of user’s body size, posture, or mobility.”

Where can I host or  
index my OER?

# Publication and Distribution

Where to Host It / Get it Published, Make it Searchable,  
and How to Let People Know It Exists

From self-publishing to institutional repositories to professionally printed materials sold in a campus bookstore, the possibilities are endless, but not are equal or appropriate for your work.

# Publishing and Distribution (1)

Some West Virginia options:

- **Marshall Digital Scholar (MDS)** <https://mds.marshall.edu/>
- **West Virginia University Digital Publishing Institute (DPI)**  
<https://dpi.lib.wvu.edu/>
- Your own library's Institutional Repository (IR) if it has one

Some (not all) options elsewhere:

- **MERLOT** - <https://merlot.org/merlot/>
- **OER Commons** - <https://www.oercommons.org/>
  - (You can create OER using Open Author, or submit a link to existing work hosted elsewhere.)
- **Open Textbook Library** - <https://open.umn.edu/opentextbooks/submit>
- **(List) Publishers of OA Books (Open Access Directory)**
  - [http://oad.simmons.edu/oadwiki/Publishers\\_of\\_OA\\_books](http://oad.simmons.edu/oadwiki/Publishers_of_OA_books)

# Publishing and Distribution (2)

## Start by Asking Questions about a Publisher or Host

For example:

- What can you tell about the quality and authority of other materials published or distributed by this organization?
- Do their policies allow your OER work to comply with the 5 R's?
- Do their policies comply with your university's IP policies?
- Will they accept work published under the license you've chosen?
- Will the work be findable?
  - OASIS and MOM?
  - Google Scholar?
  - Library catalog, search tools and databases (EBSCO Faculty Select, ProQuest, Gale, etc.)
  - General online search, SEO?

Once you've found a publisher that meets your needs

# Now it's time to teach!

Thank you for attending this presentation!

Please share it with others and use it to train at your own institutions.

- Download with the link below
- Make a copy
- Remix
- Create!

<https://is.gd/wvla2022oercreate>

