OERu

We have a vision

The overarching aim of the OERu network is to be recognised as a credible and innovative provider of quality education using open educational resources. Quality assurance and institutional accreditation through accredited partners are the cornerstones of the OERu innovation partnership.

Vision of the OERu

We envision a world where all learners have affordable access to higher education.

Mission of the OERu network

Members of the OERu network demonstrate their public service missions through the provision of alternate pathways to credible credentials using open education approaches.

Evergreen planning approach

The OERu has implemented an "evergreen" strategic plan which is a live public document which can be tweaked and refined as new information concerning changes in the internal and external environment come to hand. Evergreen planning affords the OERu the opportunity to respond with agility to new strategic opportunities and allows for nimble responses where corrections in strategy need to be made.

The strategic plan is reviewed annually at the OERu partners meeting drawing on the outputs of the active working groups for the corresponding period of review. The strategic plan provides the framework for annual reporting. Each year the strategic goals are reviewed, operational priorities for the forthcoming year are identified and key performance indicators for the plan are recalibrated.

We have a plan

Strategic Goal	Strategic objectives
Goal 1 **Achieve a fiscally sustainable and scalable OERu network**	1. Recruit the minimum number of partners for a fiscally sustainable OERu network 2. Improve community engagement for OERu planning, implementation, technology innovation and technology integration 3. Diversify external funding sources for OERu strategic and research projects
Goal 2 **Improve processes for efficient OERu operations that underpin academic quality at scale**	1. Develop, implement and maintain operational guidelines for OERu quality assurance, credit transfer and course articulation 2. Improve communications and build capability to expand roles for distributed and networked leadership to implement the OERu 3. Continue and expand the CIPP monitoring and evaluation of the OERu implementation
Goal 3 **Develop a coherent OERu programme of study with defined learning pathways and exit credentials**	1. Develop product for a coherent OERu programme of study 2. Develop guidelines and implement procedures for building the OERu programme of study incorporating alternate pathways (streams) 3. Develop and implement procedures for streamlining the nomination of OERu courses and supporting design documentation
Goal 4 **Foster innovation through pilot projects which demonstrate the viability and strategic opportunities for the OERu network**	1. Identify, design and implement OERu pilot projects to inform future improvements and innovations in the OERu model

Key performance indicators

Goal 1
Achieve a fiscally sustainable and scalable OERu network

The OERu network is fiscally sustainable and scalable when:

1. The membership fees from contributing partners cover the central infrastructure costs for hosting free content and related technology support services without reliance on 3rd party donor funding;
2. OERu partners assemble courses using open textbooks, OER and open access materials thereby reducing costs for full-fee students on campus and opening parallel pathways for assessment-only services for OERu learners;
3. OERu partners recoup recurrent cost for assessment-only services, generate new revenue for value added services and deploy OERu courses for local delivery at near-zero cost;
4. The OERu network diversifies revenue sources to support strategic projects for the benefit of its partners; and
5. The network achieves a critical mass of active engagement from staff at OERu partners through, for example: contributing to the planning and implementation of the OERu by establishing a small community source model for technology innovation, and progressing the implementation of Academic Volunteers International.

Goal 1: Objective 1
Recruit the minimum number of partners for a fiscally sustainable OERu network

Plan targets		Key performance indicator
2014 Baseline	•	36 contributing OERu partners
2015 Operational target	•	50 contributing partners by 31 December 2015
2017 Strategic target	•	55 contributing partners by 31 December 2017
Risk: Without a sustainable revenue stream to cover centrally hosted services required for free delivery of courses to OERu learners the network will need to divert valuable resource time to securing third party funding sources to cover operations which do not provide a viable long term solution.		

OER Foundation Financial Performance

OERu sustainability plan
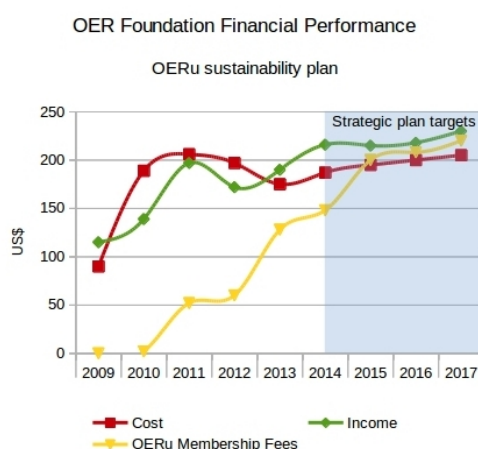
Goal 1: Objective 2:
Improve community engagement for OERu planning, implementation, technology innovation and technology integration

There are three components to the community engagement objective:

1. Improve active partner and community engagement with the capability to support open planning and implementation of the OERu
2. Build a sustainable community source model to support technology innovation of OERu systems and integration with extant campus-based systems
3. Design processes and support mechanisms for the establishment and operation of Academic Volunteers International (AVI).

Plan targets	Key performance indicator
2014 Baseline	• 80 participants on the OERu partners planning email list • 267 participants on the open OERu community email list • 27% of partners represented in active working groups • 0.075 FTE contribution in kind to OERu community source technology innovation (i.e 1.5 days per month spread across the network). • 14% of OERu partners with membership on the OERu technology email list • Outputs of SCoPE planing seminar for AVI and concept user stories completed.
2015 Operational target	• 150 participants on the OERu partners planning list by 31 December 2015 (i.e. approximately 4 members per partner institution). • 350 participants on the open OERu community list • 80% of OERu partners having at least one institutional representative participating in an active working group as part of their 0.2FTE contribution by 31 December 2015 • 0.5 FTE contribution in kind to OERu **community source** technology innovation (i.e. 10 working days per month spread across the network) • 30% of OERu partners with membership on the OERu technology email list • AVI Process design framework to communicate activities where volunteer help is needed and to coordinate volunteers.
2017 Strategic target	• 250 participants on the OERu partners planning list by 31 December 2015 (i.e. approximately 4 individuals per partner institution) • 500 participants on the open OERu community list • 90% of OERu partners having at least one institutional representative participating in an active working group as part of their 0.2FTE contribution by 31 December 2015 • 1 FTE contribution in kind to OERu community source technology innovation (i.e. 20 working days per month spread across the network) • Incremental implementation of AVI initiatives.
Risk: Unnecessary duplication of effort in the absence of tacit knowledge and experience gained through active participation in the OERu planning and implementation process and material constraints holding back technology innovations for the network.	

Goal 1: Objective 3
Diversify external funding sources for OERu strategic and research projects

Plan targets	Key performance indicator
2014 Baseline •	Zero baseline for collaborative OERu projects
2015 Operational target •	US$200,000*
2017 Strategic target•	US$400,000* (cumulative)
Risk: Strategic development in the following areas will be curtailed: Achieving a critical mass of baseline courses designed for international reuse for formal academic credit; technology innovation for collaborative delivery in parallel mode; and research to inform the implementation of the OERu model * The quantum refers to the amount, not necessarily the OERF as recipient as we encourage partners to prepare funding proposals for OERu projects	

Goal 2
Improve processes for efficient OERu operations that underpin academic quality at scale

The OERu operates efficiently at scale when:

1. Agreed and approved guidelines and corresponding processes ensure the quality of its courses to maximise reuse, credit transfer and course articulation within the network;
2. Adequate resources and professional development opportunities are available to support the needs of course design and development for the OERu model and capability development needs of partner staff for collaborative open design approaches;
3. Appropriate organisational structures, communication channels and regular meetings support the needs of the network to successfully implement the OERu strategic plan and operational priorities for the corresponding year;
4. Ongoing monitoring and evaluation informs the design, process and product of the OERu collaboration.

Goal 2: Objective 1
Develop, implement and maintain operational guidelines for OERu quality assurance, credit transfer and course articulation

Plan targets	Key performance indicator
2014 Baseline	• Initial review of eCampusAlberta quality guidelines by Course Approval and Quality working group completed • Selected partner survey on credit transfer completed by Credit Transfer and Course Articulation working group with basis to recommend credit transfer guidelines for the network. • Baseline survey of OERu partners with Bachelor of General Studies (or equivalent degree) including plausibility assessment of credit transfer of existing course nominations completed. • Average credit transfer rate of 50% of nominated OERu courses towards institutions which have a Bachelor of General Studies (or equivalent credential) is probable.

2015 Operational target	• Finalise OERu guidelines for credit transfer and course articulation targeting 30% adoption by OERu partners by end of 2015* • Develop recommendations for system to coordinate and communicate credit transfer and articulation pathways to OERu learners. • Develop recommendations for system to communicate degree pathways and pricing models for services (summative assessment and other value-added partner services.) • Publish and adopt OERu quality guidelines.
2017 Strategic target	• 80% of OERu partners adopt credit transfer and course articulation guidelines. • All OERu course developments meet the minimum quality assurance guidelines. • Achieve an average credit transfer rate of 60% of all OERu courses towards institutions who have a Bachelor of General Studies (or equivalent credential).

Risk: In the absence of agreed standard processes for credit transfer and course articulation credit transfer rates will decrease while increasing the average cost for design, development and delivery of OERu courses. Poor quality OERu courses will tarnish the reputation of the OERu and its partner institutions.

*Adoption means that the appropriate OERu executive manager signs off that OERu credit transfer and course articulation guidelines align with local policy partner policy protocols.

Goal 2: Objective 2
Develop, implement and maintain resources to support partners for effective engagement in the OERu network

Plan targets	Key performance indicator
2014 Baseline	• Initial draft of OERu partners and course development manual published on the wiki for review. • 30% of resources for digital skills for collaborative OER development completed to support OERu partner course sprint.
2015 Operational target	• Review, refine and publish OERu partners and course development manual (incorporating critical friend review from a number of new OERu partners) • Complete digital skills for collaborative OER development and run pilot offering during 2015. • Establish working group / task force for new OERu partners and new staff joining collaborative OERu activities.
2017 Strategic target	• Induction programme for staff for new OERu partners implemented.

Risk: Staff at OERu partners do not have the necessary skills or experience in open design resulting in duplication of effort and increased cost for local assembly of OERu courses.

Goal 2: Objective 3
Improve communications and build capability to expand roles for distributed and networked leadership to implement the OERu

Plan targets	Key performance indicator
2014 Baseline	• 8 working group conveners • 2 national OERu partner meetings during 2014 (Australia and New Zealand)
2015 Operational target	• Establish regional / national OERu hubs aiming to achieve 4 regional / national OERu meetings • Expand OERu community leadership roles (and corresponding buddy system to mentor new community leaders.)

Plan targets	Key performance indicator
2017 Strategic target	• OERu leadership roles formally recognised by OERu partner institutions as part of mainstream activities.

Risk: Over reliance on a small number of individuals because the OERu does not have a succession planning strategy in place to identify and develop capability and individuals to assume leadership roles in the OERu international partnership curtailing potential to scale the collaboration.

Goal 2: Objective 4
Continue and expand the CIPP monitoring and evaluation of the OERu implementation

Plan targets	Key performance indicator
2014 Baseline	• Context, Input, Process, and Product (CIPP) model adopted as evaluation framework for the OERu implementation • Context evaluation completed • Australian Digital Futures Institute commissioned to conduct Input evaluation.
2015 Operational target	• Collaborative review of the survey items for the input evaluation • Conduct input evaluation survey and selected qualitative interviews • Publish input evaluation report.
2017 Strategic target	• Process evaluation of OERu implementation.

Risk: OERu decision making is not informed by the evolution of the project disregarding evidence for agile and responsive implementation planning.

Goal 3
Develop a coherent OERu programme of study with defined learning pathways and exit credentials

The OERu network achieves a coherent programme of study when:

1. OERu learners can complete a Bachelor of General studies (or equivalent credential) at a number of OERu partner institutions
2. OERu learners can choose alternate pathways (streams) of study
3. OERu learners can transfer or apply credit from OERu courses for alternate qualifications at the majority of OERu partners
4. Additional programmes of study with corresponding exit credentials are available for OERu learners.

Goal 3: Objective 1
Develop product for a coherent OERu programme of study

Plan targets	Key performance indicator
2014 Baseline	• 32 full course equivalent* nominations (75% undergraduate) • 3 full course equivalents* completed for delivery • 2 additional programmes (Graduate Diploma in Tertiary Education & Postgraduate Diploma in Disaster Risk Studies). • 42% of OERu teaching partners have nominated at least 1 course (29% of OERu partners have already nominated their 2-course contribution with 10% of the OERu partners exceeding the 2-course requirement).

2015 Operational target	• Develop idealised degree structure prioritising 1st year of OERu study to inform course nominations. • Complete 10 full course equivalents* for delivery by 30 June 2015 • Complete additional 10 full course equivalents* by 31 December 2015 • 80% of OERu teaching partners have nominated their 1st course contribution.
2017 Strategic target	• 80 full course equivalent* nominations (cumulative) by 31 December 2017 • 50 full course equivalents* completed for delivery • 50% of OERu partners have nominated their 2nd course contribution. • 3 additional programmes (cumulative) leading to alternate exit credentials (over and above the Bachelor of General Studies).

Risk: Without sufficient product to complete a meaningful programme of study, OERu will not be attractive to learners (or future partners)

* A full course equivalent refers to the component subjects which together form a programme of degree study and typically range from 120 to 200 notional hours of learning depending on the local system. OERu partners may divide full courses into sets of micro courses of approximately 40 to 50 notional learning hours to facilitate virtual mobility across international boundaries.

Goal 3: Objective 2
Develop guidelines and implement procedures for building the OERu programme of study incorporating alternate pathways (streams)

Plan targets	Key performance indicator
2014 Baseline	• Bachelor of General Studies agreed as inaugural credential of the OERu. • Tentative streams identified during 2nd meeting of OERu partners. • Results of partner survey on the Bachelor of General Studies and probable articulation of existing nominations.
2015 Operational target	• Publish and idealised degree structure with pathways (streams) to achieving the Bachelor of General Studies (or equivalent credential) or optional exit credentials from OERu partner institutions to better inform course nominations and course development. • Establish general education component for 1st year of study
2017 Strategic target	• Pathways of study towards the Bachelor of General studies implemented and communicated effectively to prospective OERu learners.

Risk: Learners will not consider the OERu as a viable alternative for higher education study if they can't see pathways to achieving a degree.

Goal 4
Foster innovation through pilot projects which demonstrate the viability and strategic opportunities for the OERu network

OERu pilots are projects which are implemented by one or more OERu partners designed to prove the viability of new approaches and technologies that improve efficiency or serve as a proof of concept for innovations or new business services enabled by the disaggregation of services in the OERu model.

The OERu innovation pilots for demonstrating viable solutions for the future are successful when:

1. They reduce cost, widen access or improve the quality of the OERu delivery model;
2. Tangible benefits which individual partners can extract from the OERu network for mainstream delivery on campus increase.

Goal 4: Objective 1
Identify, design and implement OERu pilot projects to inform future improvements and innovations in the OERu model

Plan targets	Key performance indicator
2014 Baseline	• SP4Ed prototype embedding mOOC for full-fee registered students studying in parallel with free OERu learners. • 2014 Google Summer of Code project to develop peer evaluation prototype • Concept idea for OERu credit-bearing course on how to develop a portfolio for Recognition of Prior Learning
2015 Operational target	• Progress the implementation of 2 pilot projects (RPL portfolio course and parallel mode prototype) • Identify 1 new high-priority pilot project for implementation
2017 Strategic target	• 4 OERu pilots successfully completed
Risk: OERu does not leverage incremental design to keep abreast with a volatile and rapidly changing higher education market.	