

---

## 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

<b>Strategic Goal</b>	<b>Strategic objectives</b>
Goal 1  <b>Develop a coherent OERu programme of study with defined learning pathways and exit credentials</b>	<ol style="list-style-type: none"> <li>1. Develop product for a coherent OERu programme of study</li> <li>2. Develop guidelines and implement procedures for building the OERu programme of study incorporating alternate pathways (streams)</li> <li>3. Develop and implement procedures for streamlining the nomination of OERu courses and supporting design documentation</li> </ol>
Goal 2  <b>Improve processes for efficient OERu operations that underpin academic quality at scale</b>	<ol style="list-style-type: none"> <li>1. Develop, implement and maintain operational guidelines for OERu quality assurance, credit transfer and course articulation</li> <li>2. Improve communications and build capability to expand roles for distributed and networked leadership to implement the OERu</li> <li>3. Continue and expand the CIPP monitoring and evaluation of the OERu implementation</li> </ol>
Goal 3  <b>Achieve a fiscally sustainable and scalable OERu network</b>	<ol style="list-style-type: none"> <li>1. Recruit the minimum number of partners for a fiscally sustainable OERu network</li> <li>2. Improve community engagement for OERu planning, implementation, technology innovation and technology integration</li> <li>3. Diversify external funding sources for OERu strategic and research projects</li> </ol>
Goal 4  <b>Foster innovation through pilot projects which demonstrate the viability and strategic opportunities for the OERu network</b>	<ol style="list-style-type: none"> <li>1. Identify, design and implement OERu pilot projects to inform future improvements and innovations in the OERu model</li> </ol>

# Key performance indicators

## Goal 1

### 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 1: Objective 1

##### Develop product for a coherent OERu programme of study

Plan targets	Key performance indicator
2014 Baseline	<ul style="list-style-type: none"><li>• 32 full course equivalent* nominations (75% undergraduate)</li><li>• 3 full course equivalents* completed for delivery</li><li>• 2 additional programmes (Graduate Diploma in Tertiary Education &amp; Postgraduate Diploma in Disaster Risk Studies).</li><li>• 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).</li></ul>
2015 Operational target	<ul style="list-style-type: none"><li>• Develop idealised degree structure prioritising 1st year of OERu study to inform course nominations.</li><li>• Complete 10 full course equivalents* for delivery by 30 June 2015</li><li>• Complete additional 15 full course equivalents* by 31 December 2015</li><li>• 80% of OERu teaching partners have nominated their 1st course contribution.</li><li>• 15 new full course equivalent nominations during 2015</li><li>• 1 additional programme leading to alternate exit credential (over and above the Bachelor of General Studies).</li></ul>
2017 Strategic target	<ul style="list-style-type: none"><li>• 80 full course equivalent* nominations (cumulative) by 31 December 2017</li><li>• 50 full course equivalents* completed for delivery</li><li>• 50% of OERu partners have nominated their 2nd course contribution.</li><li>• 3 additional programmes (cumulative) leading to alternate exit credentials (over and above the Bachelor of General Studies).</li></ul>

*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.

The OERu exceeded its 2014 operational priority target to nominate 20 full course equivalents. However progress on assembling OERu courses has been slow, in part delayed by technology developments to generate a customisable and mobile friendly theme mirroring the design of the OERu website and the consultative development of processes, documentation and training to support the open design and development of OERu courses.

These infrastructure pieces are now in place and progress with the development of product is now a high priority for the network.

A diverse [array of courses](#) have been nominated, including two additional programmes of study: Graduate Diploma in Tertiary Education at Otago Polytechnic and the Postgraduate Diploma in Disaster Risk Studies at North-West University. The network needs to significantly increase the number of courses at the 1st year level in the short term which will form the foundation for building a coherent programme of study (currently only 19% of the nominations are 1st-year level courses).

### Strategic approach

1. Assemble courses from existing OER and open access materials rather than developing from scratch.
2. Promote the "textbook zero" model adopting high quality open textbooks to scale rate of development incorporating engaging activities into the learning pathways which guide learners through the OERu courses.
3. Open and collaborative development publishing design blueprints and draft materials on WikiEducator encouraging peer-review and support from the OERu community.

### 2015 Operational considerations

1. Adopt appropriate but flexible project management solutions to schedule and monitor course development progress in achieving the OERu network's targets.
2. Conduct 2015 audit of new course nominations during the first quarter of 2015.
3. Schedule an open "course sprint" focusing on building digital skills for collaborative OERu course design and development aiming to expand the cadre of staff in the OERu network to scale future product development.
4. Consider strategies which will maximise tangible return on investment for individual partners leveraging the value and diversity of the OERu international partnership, for example:
  - Diversify curriculum of partner institutions through collaborative development and shared delivery of low enrolment courses which would not be cost-effective for individual partners to develop on their own.
  - Consider courses and delivery approaches which build on the international diversity of the network, for instance, courses in indigenous and inter-cultural studies or the ability to attract international OERu learners to add marketable value to local full-fee courses by incorporating OERu mOOCs into the local delivery model.

### Goal 1: 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	<ul style="list-style-type: none"><li>• Bachelor of General Studies agreed as inaugural credential of the OERu.</li><li>• Tentative streams identified during 2nd meeting of OERu partners.</li><li>• Results of partner survey on the Bachelor of General Studies and probable articulation of existing nominations.</li></ul>
2015 Operational target	<ul style="list-style-type: none"><li>• 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.</li><li>• Establish general education component for 1<sup>st</sup> year of study</li></ul>
2017 Strategic target	<ul style="list-style-type: none"><li>• Pathways of study towards the Bachelor of General studies implemented and</li></ul>

	communicated effectively to prospective OERu learners.
<i>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.</i>	

Bootstrapping the assembly of the OERu programme of study is a catch 22 because in the absence of a critical mass of courses, it is a challenge to derive pathways of study to inform nominations for future course development. The OERu is working from "both ends" namely bottom-up nominations for a smorgasbord of courses in the short term and working in parallel to develop top-down guidelines contributing to clear pathways of study.

### Strategic approach

1. Work within the existing degree structures and policies of partner institutions to ensure credible exit credentials.
2. Maximise opportunities for sustainable course articulation within the network.

### 2015 Operational issues

1. Consultative development of an idealised degree structure to inform future course nominations.
2. Prioritise the 1st year of study building on the wide adoption of a [general education component](#) in the OERu Bachelor of General Studies.
3. Consider a focused working group to assemble guidelines for the foundation / 1st year of study at the OERu.

### Goal 1: Objective 3

#### Develop and implement procedures for streamlining the nomination of OERu courses and supporting design documentation

Plan targets	Key performance indicator
2014 Baseline	<ul style="list-style-type: none"> <li>• Initial <a href="#">call for prototype courses, consensus poll and decision</a>.</li> <li>• <a href="#">2014 call for nominations</a> and <a href="#">current list of OERu nominations</a></li> <li>• 37% of OERu partners have assigned an <a href="#">administrator</a> for their pages on the OERu Content Management System.</li> </ul>
2015 Operational target	<ul style="list-style-type: none"> <li>• Review process and lessons learned from previous nomination calls.</li> <li>• Develop and publish streamlined process for course nominations and supporting design documentation.</li> <li>• 100% of OERu partners assign an <a href="#">administrator</a> for their pages on the Content Management System.</li> </ul>
2017 Strategic target	Streamlined process for ongoing OERu course nominations and design implemented
<i>Risk: OERu courses nominated by partners do not contribute meaningfully to the achievement of the strategic goals of the network. Closed design models contribute to unnecessary duplication of effort, restrict efficient reuse of OERu courses and constrain diversified services for assessment.</i>	

To date, the OERu has used the following process for nominating courses:

1. Publish the call for nominations and suggested criteria on the wiki planning portal with a suggested due date.
2. Call for nominations and reminders are distributed via the partner's email planning list.
3. Online form and corresponding wiki page is used to publish nominations received.
4. OERu partners are invited to complete the short course summary which is published on the [OERu](#)

public website. (OERu partners assign a local administrator who are provided with editing rights on the OERu content management system to maintain their course and partner pages.)

### Strategic approach

1. Autonomy of OERu partners to manage their own partner and course descriptions on the OERu public website.
2. Encourage open development of design documentation to minimise duplication of effort, leverage cooperation in the network and diversify the range of assessment services.

### 2015 operational issues

1. Design system for streamlining OERu course nomination process taking future scalability into account.
2. Consider proposals for ensuring OERu website information is maintained and updated (for example published dates of course delivery).
3. Consider appropriate solutions for assuring quality of public information on the OERu website.

## 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	<ul style="list-style-type: none"><li>• Initial review of eCampusAlberta quality guidelines by Course Approval and Quality working group completed</li><li>• 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.</li><li>• Baseline survey of OERu partners with Bachelor of General Studies (or equivalent degree) including plausibility assessment of credit transfer of existing course nominations completed.</li><li>• Average credit transfer rate of 50% of nominated OERu courses towards institutions which have a Bachelor of General Studies (or equivalent credential) is probable.</li></ul>

2015 Operational target	<ul style="list-style-type: none"> <li>Finalise OERu guidelines for credit transfer and course articulation targeting 30% adoption by OERu partners by end of 2015*</li> <li>Develop recommendations for system to coordinate and communicate credit transfer and articulation pathways to OERu learners.</li> <li>Develop recommendations for system to communicate degree pathways and pricing models for services (summative assessment and other value-added partner services.)</li> <li>Develop guidelines and recommendations for measuring OERu learner satisfaction.</li> <li>Publish and adopt OERu quality guidelines.</li> </ul>
2017 Strategic target	<ul style="list-style-type: none"> <li>80% of OERu partners adopt credit transfer and course articulation guidelines.</li> <li>All OERu course developments meet the minimum quality assurance guidelines.</li> <li>Achieve an average credit transfer rate of 60% of all OERu courses towards institutions who have a Bachelor of General Studies (or equivalent credential).</li> </ul>
<p><i>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.</i></p> <p>*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.</p>	

### Strategic approach

1. The OERu partners retain decision-making autonomy regarding all aspects of summative assessment, local OERu credit transfer and course articulation.
2. The OERu partners retain decision-making autonomy regarding the pricing of related services.
3. The OERu focuses on operating within existing institutional policies minimising the need for policy change at partner institutions.
4. The OERu does not prescribe or dictate pedagogical models encouraging diversity yet generating opportunities for reuse and improved efficiency for local offerings on campus.

### 2015 operational issues

1. Progress consultative development of minimum quality standards required for successful design and development of OERu courses to maximise reuse potential within the network without dictating pedagogical design.
2. Engage registrar level input and initial sign-off of the credit transfer and course articulation guidelines by a representative sample of OERu partners.
3. Develop systems to co-ordinate and communicate pathways of study and credit transfer options to OERu learners.
4. Agree process and systems to communicate the cost of related services to OERu learners?

### 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	<ul style="list-style-type: none"> <li>Initial draft of <a href="#">OERu partners and course development manual</a> published on the wiki for review.</li> <li>30% of resources for <a href="#">digital skills for collaborative OER development</a> completed to support OERu partner course sprint.</li> </ul>

2015 Operational target	<ul style="list-style-type: none"> <li>• Review, refine and publish OERu partners and course development manual (incorporating critical friend review from a number of new OERu partners)</li> <li>• Complete digital skills for collaborative OER development and run pilot offering during 2015.</li> <li>• Establish working group / task force for new OERu partners and new staff joining collaborative OERu activities.</li> </ul>
2017 Strategic target	<ul style="list-style-type: none"> <li>• Induction programme for staff for new OERu partners implemented.</li> </ul>

*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.*

### Strategic approach

1. Open and authentic "work-based-learning" approach to gaining experience and developing capability in the OERu network.

### 2015 operational considerations

1. Accelerating the rate for skills and knowledge acquisition for OERu partner staff to contribute meaningfully to the OERu global collaboration.
2. Widening participation from OERu partner staff for effective engagement in the OERu network.

### 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	<ul style="list-style-type: none"> <li>• 8 working group conveners</li> <li>• 2 national OERu partner meetings during 2014 (Australia and New Zealand)</li> </ul>
2015 Operational target	<ul style="list-style-type: none"> <li>• Establish regional / national OERu hubs aiming to achieve 4 regional / national OERu meetings</li> <li>• Expand OERu community leadership roles (and corresponding buddy system to mentor new community leaders.)</li> </ul>
2017 Strategic target	<ul style="list-style-type: none"> <li>• OERu leadership roles formally recognised by OERu partner institutions as part of mainstream activities.</li> </ul>

*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.*

### Strategic approach

1. A leadership model informed by the principles of meritocracy.
2. Learn by doing approach where prospective community leaders build capability by working with more experienced OERu collaborators.

### 2015 operational considerations

1. Consider recommendations for establishing regional OERu hubs (Goals and objectives, how they should function and liaise with the OERu structures.)
2. Identify leadership gaps and corresponding proposals to expand and support new community leadership roles.

## **Goal 2: Objective 4**

**Continue and expand the CIPP monitoring and evaluation of the OERu implementation**

<b>Plan targets</b>	<b>Key performance indicator</b>
2014 Baseline	<ul style="list-style-type: none"> <li>• Context, Input, Process, and Product (CIPP) model adopted as evaluation framework for the OERu implementation</li> <li>• <b>Context evaluation</b> completed</li> <li>• Australian Digital Futures Institute commissioned to conduct Input evaluation.</li> </ul>
2015 Operational target	<ul style="list-style-type: none"> <li>• Collaborative review of the survey items for the input evaluation</li> <li>• Conduct input evaluation survey and selected qualitative interviews</li> <li>• Publish input evaluation report.</li> </ul>
2017 Strategic target	<ul style="list-style-type: none"> <li>• Process evaluation of OERu implementation.</li> </ul>
<p><i>Risk: OERu decision making is not informed by the evolution of the project disregarding evidence for agile and responsive implementation planning.</i></p>	

### **Strategic approach**

1. Evidence-based monitoring and evaluation of the OERu implementation.
2. Agile and responsive implementation planning.

### **2015 operational considerations**

1. Consider and review the appropriateness of the OERu structural and procedural designs for achieving future success.

## **Goal 3**

### **Achieve a fiscally sustainable and scalable OERu network**

The OERu network is fiscally sustainable and scalable when:

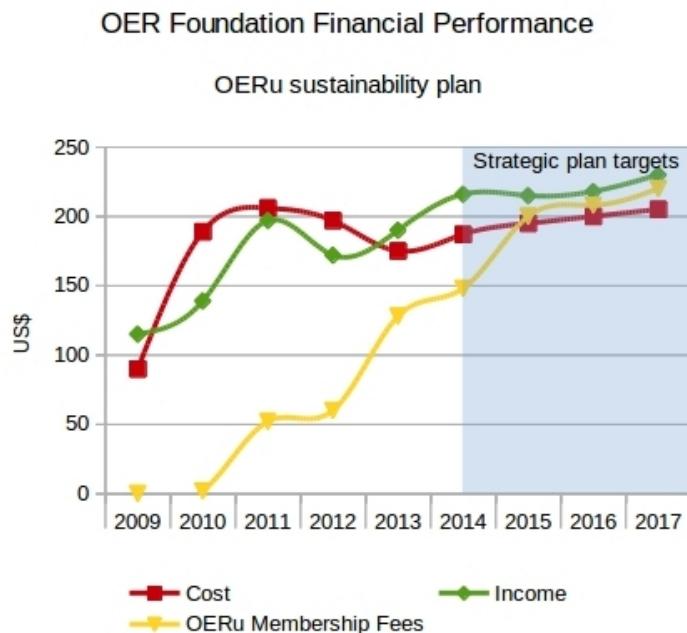
1. The membership fees from contributing partners cover the central infrastructure costs for hosting free content and related technology support services without reliance on 3rd party donor funding;
2. OERu partners assemble courses using open textbooks, OER and open access materials thereby reducing 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 3: 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
<i>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.</i>	

Established in May 2009, the OERF has built a solid financial model and foundation for achieving a fiscally sustainable OERu collaboration. Currently, approximately 72% of the operational costs of the OERu collaboration is recovered through membership fees. During the inception years of the OERu initiative, the generous funding support from the William and Flora Hewlett Foundation has enabled the OERF to achieve the critical mass of OERu partners for a viable international partnership. The OERF has also received nominal financial support from the Commonwealth of Learning equating to approximately 7.5% of the annual operational cost of the OERu project.



The OERF has pursued additional project and contract work to reduce the cumulative deficit during its formative years. However, this contract work contributes to unwelcome mission drift by utilising scarce resources for projects not directly related to the implementation of the OERu. Fortunately, the OERF is forecasting that by the end of the 2014 fiscal year, it will wipe out the accumulated deficit to commence the 2015 - 2017 strategic plan without any debt burden, unlike a number of the commercial MOOC start ups which will need to recoup multi-million dollar investments from venture capital funding.

As an independent non-profit organisation, any surpluses must be reinvested back into charitable activities for the benefit of the OERu network. While the generation of any surpluses is not a major focus during this consolidation phase of the OERu plan, should the recruitment of new members exceed our targets these funds

could be, for example, reinvested in commissioning the assembly of OERu courses or contributions to additional support for the OERu infrastructure.

### **Strategic approach**

The strategic approach for the OERu 2015-2017 plan is to:

1. Contain operational costs for the central OERu infrastructure to around US\$200,000 per annum for the duration of the plan;
2. Achieve break even for operational costs from OERu membership fees without reliance on 3rd party funding with a small margin to compensate for unforeseen membership attrition;
3. Avoid reliance on 3rd party funding for OERu operational expenditure.

### **Open technology principles**

The OER Foundation provides a centrally hosted technology service based on open source software for the collaborative development of OERu courses and delivery at no-cost to the learners. The costs of hosting this infrastructure is funded through OERu membership fees. We subscribe to the following principles:

1. All learners should have unrestricted access to all course materials without the need for password access.
2. To maximise reuse across the network we encourage partners to develop courses using the WikiEducator content repository. In cases where partner institutions choose to host courses using their own delivery technologies, they are responsible for the full costs of hosting these resources for all OERu learners.

### **2015 operational considerations**

1. Establish a working group to support the OERF with membership recruitment (or maintain this portfolio as part of the Marketing, Recruitment and Communication working group).
2. Seek advice and support from the OERu Council of Chief Executive Officers on achieving recruitment targets and the achievement of operational priorities.

### **Goal 3: 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	<ul style="list-style-type: none"><li>• 80 participants on the OERu partners planning email list</li><li>• 267 participants on the open OERu community email list</li><li>• 27% of partners represented in active working groups</li><li>• 0.075 FTE contribution in kind to OERu community source technology innovation (i.e 1.5 days per month spread across the network).</li><li>• 14% of OERu partners with membership on the OERu technology email list</li><li>• Outputs of <a href="#">SCoPE planing seminar for AVI</a> and concept <a href="#">user stories</a> completed.</li></ul>

2015 Operational target	<ul style="list-style-type: none"> <li>• 150 participants on the OERu partners planning list by 31 December 2015 (i.e. approximately 4 members per partner institution).</li> <li>• 350 participants on the open OERu community list</li> <li>• 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</li> <li>• 0.5 FTE contribution in kind to OERu <b>community source</b> technology innovation (i.e. 10 working days per month spread across the network)</li> <li>• 30% of OERu partners with membership on the OERu technology email list</li> <li>• Develop recommendations for tracking learners accessing OERu course materials</li> <li>• AVI Process design framework to communicate activities where volunteer help is needed and to coordinate volunteers.</li> </ul>
2017 Strategic target	<ul style="list-style-type: none"> <li>• 250 participants on the OERu partners planning list by 31 December 2015 (i.e. approximately 4 individuals per partner institution)</li> <li>• 500 participants on the open OERu community list</li> <li>• 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</li> <li>• 1 FTE contribution in kind to OERu community source technology innovation (i.e. 20 working days per month spread across the network)</li> <li>• Incremental implementation of AVI initiatives.</li> </ul>
<p><i>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.</i></p>	

The OERu is distinctively open and this is a key point of difference of the network. The OERu uses open educational resources (OER) and open access materials supported by open educational practices (OEP). Open licensing is a precondition for OERu courses guiding learners to open access materials. There are two additional dimensions of openness which can be leveraged for the strategic advantage of the OERu network:

1. The technology infrastructure of the OERu is based entirely on open source software generating opportunities for building a community source model whereby partners could contribute open source coding time for technology innovation and seamless integration into the local institutional delivery platforms.
2. The open design approaches and transparent planning model of the OERu implementation can contribute to considerable efficiency gains for the network. However, many staff at our partner institutions are not experienced with open planning processes and open collaborative design models.

### Strategic approach

1. Incremental design is the preferred modus operandi to ensure agility of the OERu network.
2. Open communication with a transparent public record of decisions aims to build community and facilitate long term sustainability.
3. To scale capability development the OERu advocates a "pay it forward" model, where the beneficiaries of new OERu skills are encouraged to repay their learning by helping a new community member in the future.

### 2015 operational considerations

1. Increase OERu partner representation on the active working groups.
2. Undertake an inventory of partner institutions to identify open source skill sets within the network and corresponding activities to nurture the development of a community source model.

3. Implement activities to promote capability development of partner institutions in open planning methodologies.
4. Promote OERu community building.
5. Devise induction and support mechanisms for new OERu partners.
6. Progress the Academic Volunteers International process framework to communicate OERu needs and to coordinate active involvement of the volunteer community.

### **Goal 3: Objective 3**

#### **Diversify external funding sources for OERu strategic and research projects**

The OERu is a unique international charitable collaboration. The network draws its strength from our international diversity, currently with thirty six partner institutions from six global regions of the world working at the contemporary nexus of OER, open online courses and virtual mobility towards more affordable credentials. Our network generates opportunities for diversifying funding sources from the international donor community for strategic projects. In addition, our commitment to open data and open planning provides attractive opportunities for research funding to inform and facilitate the implementation of the OERu.

<b>Plan targets</b>	<b>Key performance indicator</b>
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

The OER and open access movement has made considerable progress producing a large and impressive inventory of OER, open textbooks and open access research outputs. However, there are few courses incorporating a range of pedagogical elements for independent study which are designed for reuse for formal academic credit across multiple institutions and international boundaries, and which are published under open licenses and editable file formats. The OERu model provides fertile ground to attract seed funding to assemble a critical mass of reusable university level courses designed for cross-border education which could support the OERu priority of rapidly developing product for the OERu collaboration.

The availability of OER is no longer a significant issue. The modern challenges include:

- providing collaborative ways for educators to adapt and extend existing resources; and
- providing a federated, networked delivery model that allows institutions to share their course offerings.

A central repository or even a network of repositories is not enough. A federated system either in the cloud, or more excitingly built within the user's browser (pulling resources and functionality from around the Internet) would permit student identity to persist across courses and allow educators to aggregate the elements and services upon which they base their "course." The web platform has the adaptability and extensibility to allow a component model to be developed that would exceed the capabilities of existing resource standardization attempts.

## **Strategic approach**

1. Focus collaborative grant proposals on strategic projects which build future capability for the implementation of the OERu and the international OER ecosystem without creating dependencies for ongoing operational expenditure.
2. Support research funding proposals that use OERu open data and publish findings under free cultural works approved licenses.
3. Encourage open and transparent development of collaborative OERu funding proposals.

## **2015 operational considerations**

1. Establish mechanisms for coordinating the development of OERu strategic initiatives and supporting associated research projects that could attract external funding.
2. Identify strong candidate projects for external funding.

## **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	<ul style="list-style-type: none"><li>• SP4Ed prototype embedding mOOC for full-fee registered students studying in parallel with free OERu learners.</li><li>• 2014 Google Summer of Code project to develop peer evaluation prototype</li><li>• Concept idea for OERu credit-bearing course on <a href="#">how to develop a portfolio for Recognition of Prior Learning</a></li></ul>
2015 Operational target	<ul style="list-style-type: none"><li>• Progress the implementation of 2 pilot projects (RPL portfolio course and parallel mode prototype)</li><li>• Identify 1 new high-priority pilot project for implementation</li></ul>
2017 Strategic target	<ul style="list-style-type: none"><li>• 4 OERu pilots successfully completed</li></ul>

*Risk: OERu does not leverage incremental design to keep abreast with a volatile and rapidly changing higher education market.*

## **Strategic approach**

1. The OERu subscribes to a design-based research approach where pilots are conceptualised and implemented iteratively in authentic settings.
2. Project steps are informed by a series of Probe (making a change), Sense (review), Respond (act) cycles so that each iteration is small enough to fail but when aggregated help to inform overall decision-making.

## **2015 Operational considerations**

1. Progress the collaborative design and development of a credit bearing OERu course on how to develop a Recognition of Prior Learning Portfolio
2. Initiate the design and development of an OERu micro-course which can be used by two or more OERu partners as part of delivery to full-fee students studying in parallel with free OERu learners.
3. Consider and select viable candidates for two potential OERu pilot projects.