



Implementing the OERu Minimum Viable Product

(Progress report on the OERu 1st year of study prepared for the 5th international meeting of OERu partners to be hosted by the University of the Highlands and Islands, 3 – 4 October 2016, Inverness.)

August 2016

1. Implementing the OERu

The implementation of the OERu is guided by our “evergreen” [Strategic Plan 2015 – 2017](#) which is reviewed and recalibrated at the annual international meeting of OERu partners. These operational priorities are endorsed by the subsequent meeting of OERu Council of Chief Executive Officers.

The strength of the OERu network lies in the rigour of our planning and our transparent and collaborative planning processes published on WikiEducator. The OERF has published a dynamic time line summarising key milestones of the Foundation's progress since incorporation in 2009 at oeru.org/History.

These transparent practices have enabled the OERu network to make impressive progress during the current year and we are on track to achieve the 2016 key performance indicators agreed at the October 2015 meeting of the OERu Council of Chief Executive Officers. For example, work on the completion of the open online courses required for the launch of the OERu 1st year of study is progressing well. We have also successfully completed the *Marketing, communications and fund development project* resulting in considerable improvement in the OERF's marketing and communication capacity including a wide range of high quality marketing and communication resources targeting partner recruitment and some collateral for student recruitment. Planning for the 2016 OERu international meetings to be hosted at the University of the Highlands and Islands in October is on schedule and the network will focus on the planning for the launch of the OERu 1st year of study at these forthcoming meetings.

1.1 OERu free 1st year of study

Two significant decisions were agreed at the October 2015 [OERu international meeting of OERu partners](#) hosted by North-West University in South Africa:

1. Unanimous approval of the the OERu [credit transfer and credit accumulation guidelines](#). These guidelines provide the process and mechanism for learners to gain recognised qualifications through a system of international credit transfer among OER partner institutions.
2. The implementation of a free 1st year of study leading to recognised exit qualifications as Minimum Viable Product (MVP).

The network has nominated two exit credentials for our 1st year of study: The [Certificate of Higher Education](#) (Business Studies), University of the Highlands and Islands; and the Certificate of General Studies, Thompson Rivers University.

1.1.1 Defining Minimum Viable Product (MVP)

The OERu has defined MVP as an offering containing the minimum set of core features for a compelling deployable product. It is the version of the product that allows the OERu to collect the maximum amount of information about our learners, delivery model, and market at minimal

cost. Specifically, the OERu MVP first year of study will model the end-to-end process and requires:

- sufficient open online courses assembled from OER that will contribute to two exit qualifications,
- completed by a target date - 1st quarter of 2017,
- assembled as micro-courses (see below),
- developed using open standards and open file formats on a common platform (WikiEducator),
- available from one location – OERu.org,
- from which learners can participate, and on completion
- are directed to OERu institutions providing assessment,
- where they could achieve transcript credit that would be awarded and recognised towards the identified exit qualification.

1.1.2 Clarifying the OERu micro-course model

As an international network, the OERu must ensure cross-border credit transfer. However the course sizes that make up a year of study differ across international borders. The international standard for 1 year of full-time study is approximately 1200 notional learning hours. The difference in course sizes in different regions is illustrated in the table below:

Region / Country	Number of courses required for 1 year of equivalent full-time study	Notional learning hours per course	Total learning hours for 1 year of equivalent full-time study
North America	10	120	1200
Australia	8	160	1280
United Kingdom	6	200	1200
New Zealand	8	150	1200

To achieve a standard transfer “currency” the OERu has adopted a modular micro-course format. Each micro course equates to 40 notional hours of learning effort. Therefore, in North America 3 micro courses are typically required to make up a standard 3-credit course, whereas in Australia, 4 micro-courses must be completed to qualify for transcript credit for the relevant course.

In the OERu model, learners must successfully complete 30 micro-courses for a full year of study. The micro-course format also enables the implementation of optional open badges which can be mapped to formal academic credit by partners who choose to implement micro-credentials. However, learners will need to complete the full-set of associated micro-courses

before transcript credit can be recorded. The micro-course model also offers greater flexibility for learners to schedule their study and creates opportunities for different remix and reuse scenarios where OERu courses can be assembled in different ways.

International credit transfer towards qualifications is complicated further by the residency requirement, that is, the minimum number of courses that must be assessed by the conferring institution. These requirements vary considerably across the OERu institutional network. To reduce the complexity of these challenges for MVP, the OERu has selected credentials where we can guarantee an exit qualification at the respective conferring institution. Having identified the exit awards, courses selected for MVP development needed to meet two minimum criteria:

1. Be available for assessment for transcript credit at one or more OERu partners
2. Be recognised for credit transfer in at least one of the nominated exit awards.

The OERu has successfully identified the minimum number of courses required for learners to achieve the exit awards. The OERF has made significant investment this year in commissioning learning designers to assemble OERu courses for the MVP and as a result we will have sufficient product to launch a full 1st year of study. Each course will be available as an open online course through the OERu platform. Moreover, any educator in the world will be able to host their own course site for free using the WordPress content management system by using our open source snapshot script that assembles an online course site from a collection of WikiEducator pages. In this way OERu courses can be shared on a global scale demonstrating more sustainable models for higher education using open education approaches.

1.2 Summary of OERu courses for the Certificate of General Studies

(30 micro courses needed – 34 scheduled for completion by the end of the year.)

Course	Development Partner	No. of micro-courses	Progress	Completion date
Regional relations in Asia and the Pacific	USQ	4	Complete	2016Q2
Art appreciation and techniques	TRU	3	85%	2016Q4
Creating sustainable futures	OP	4	Complete	2016Q2
Introduction to critical reasoning	TESU	3	85%	2016Q4
Introduction to indigenous Australia	CSU	4	Complete	2016Q2
World history in the modern era	OERF	3	75%	2016Q3
Introduction to Psychology	KPU	3	20%	2016Q4
Introduction to research methods in Psychology	TRU	3	85%	2016Q4
Learning in a digital age	OP	4	30%	2016Q4
English composition	OERF	3	Not started	2016Q4

Notes

1. The residency requirement of 6 micro courses at has been achieved because of the two courses already completed by Thompson Rivers University.
2. Currently regulations at Thompson Rivers University do not allow for transfer credit for business courses. We are in discussion with the University to consider options for allowing credit transfer of nominated OERu business courses for the Certificate of General Studies as a strategy to provide learners with greater subject choice for the qualification.

1.3 Summary of OERu courses for the Certificate of Higher Education (Business studies)

(30 micro courses needed – 34 scheduled for completion by 2017. 70% of the required courses will be available by end of 2016.)

Course	Development Partner	No. of micro-courses	Progress	Completion date
Principles of management	OERF	3	Completed	2016Q2
Principles of marketing	OERF	3	75%	2016Q3
Microeconomics	AU	3	75%	2016Q3
Macroeconomics	AU	3	75%	2016Q3
Corporate communication	OERF	3	20%	2016Q3
Project management	OP	4	15%	2016Q4
Introduction to Business	UHI	5	15%	2016Q4
Introduction to customer centred business	UHI	5	Not started	2017Q2
Introduction to operations management	UHI	5	Not started	2017Q4

Notes

1. The University of the Highlands and Islands has a local residency requirement for assessing half of the 1st year of study locally, hence the higher number of courses nominated by the University.
2. The OERF has commissioned and funded the assembly of the remaining courses to ensure that we have a full first year of study for the Certificate in Higher Education (Business studies).

3. Assuming a successful partner recruitment campaign to generate additional revenue, the OERF could expedite the completion of the courses not started.

The OERF has also commenced work with Lunametrics to incorporate learner analytics for the OERu 1st year of study when it is launched next year.

2. Marketing, communications and fund development project

The OERF was awarded a capacity development grant from the William and Flora Hewlett Foundation to improve marketing, communications and fund development for the OERu network.

This project has filled a significant strategic gap in our marketing capacity as the OERu network prepares for the launch of the 1st year of study. The project was conducted openly and transparently in WikiEducator modelling open processes and encouraging engagement with OERu stakeholders. All outputs are openly licensed and were purposefully designed to facilitate reuse and remix by the open community.

The [creative brief](#) for the project was published on WikiEducator followed by an extensive consultation on developing the OERu elevator pitch:

“OERu is an international network of innovative higher education institutions inspired by the vision of opening access to a credible, high-quality and affordable education to learners around the world. Through OERu, learners develop knowledge and earn credits toward globally recognized qualifications at partner institutions.”

The elevator pitch was used to inform the development of all the marketing and communication (Marcom) assets to ensure consistent messaging.

2.1 Explainer videos

Early in the project, the OERu Marketing Communications and Partner Engagement working group prioritised the need to incorporate whiteboard-style explainer videos for our prospective target audiences. (Atlas claims that video promotion is over 6 times more effective than print and conventional online promotion and Forbes report that 59% of executives would rather watch a video than read text.) We have produced two videos:

1. [OERu – World-class open education](#) (Learner recruitment)
2. [OERu – Open new doors to higher education](#) (Partner recruitment)

The learner recruitment video was designed to facilitate partner branding by: incorporating the institutional logo as a channel bug; customised course screen shots to profile the partner’s OERu course contributions; and branded certificate and closing screen sequence. Otago Polytechnic was the first partner to commission the remix of a [branded OERu video](#) which will be linked from their homepage. A number of partners have expressed interest to develop their own branded versions.

2.2 Summary of project outputs

A summary of the Marcom outputs generated through this capacity development project is provided in the table below:

Originally Planned	Deliverables Completed
<p>Background Research</p> <ul style="list-style-type: none"> • Conduct interviews with current OERu partners to identify true benefits of partnership, as well as areas of opportunity • Review survey data to identify current and potential challenges • Define and communicate Value Proposition/Elevator pitch 	<ul style="list-style-type: none"> • Background research • Partner interviews • Define and communicate elevator pitch • Design/develop OERu strapline: <i>Global Sharing, Affordable Learning</i> • Ongoing communications with OERu group
<p>Updates to OERu Website</p> <ul style="list-style-type: none"> • Create and publish case studies about students and partners (budgeted for 3 case studies) • Create additional banners to promote partnership and benefits of OERu • Email capture on all pages 	<p>Case Studies</p> <ul style="list-style-type: none"> • Hewlett Foundation • LiDA Development • Executive Perspective on OERu <p>Web Content</p> <ul style="list-style-type: none"> • New hero banners for home page • Landing page - oeru.org/invite • Media kit - oeru.org/media • Case studies - oeru.org/CaseStudies • History - oeru.org/History • Email capture on all pages
<p>Create online brochures (PDF)</p> <ul style="list-style-type: none"> • Developing a downloadable brochure that provides a deeper insight into the benefits of a partnership with OERu will help build awareness, as well as provide access to important metrics regarding readership. PDF is the recommended format, which will ensure recipients that choose to print the document will maintain the original design. • The downloadable file could be used for lead generation, requiring the target audience to enter their contact information (email address) to gain access to the file, but this goes against the open nature of OERu, and thus we don't recommend it. 	<p>Business Model Canvas</p> <ul style="list-style-type: none"> • Created printable/color BMC • Created supporting brochure for BMC <p>Additional Brochure</p> <ul style="list-style-type: none"> • Another printable/downloadable brochure was created • 7 Things you should know about OERu

<p>Create Partner Package</p> <ul style="list-style-type: none"> • Media release recognizing new status as an official OERu partner • Blog post on OERu site • Additional recognition/promotion through OERu social media channels • (budgeted for 3 partner packages) 	<p>Media release created for:</p> <ul style="list-style-type: none"> • Swinburne University (New partner) • University of Highlands and Islands (launch of OERu 1st year of study) • TRU (launch of OERu 1st year of study) <p>Blog posts created for</p> <ul style="list-style-type: none"> • Swinburne University (New partner) • University of Highlands and Islands (launch of OERu 1st year of study) • TRU (launch of OERu 1st year of study) <p>Tweets/FB posts prepared for social media marketing</p>
<p>Email Drip Marketing Campaign</p> <ul style="list-style-type: none"> • Drip campaign to create engagement with current and new partners • Initial letter of introduction – compelling, but informative – not a hard sell • Follow-up letter to share benefits – how partnership with OERu will provide value to their institution. Minor CTA (visit website for more info, follow on social media, etc) • Third letter – requesting action • Fourth letter – thanking them for participating, but acknowledging that they're perhaps not ready to bring their institution into the current era (subtle – non-offensive) • Final letter – outlining that this is the final outreach, and further conversations will need to be initiated by the recipient. 	<ul style="list-style-type: none"> • Created new version of letter of invitation for prospective partners • Researched and recommended open source email platform (Mautic) • Created email drip campaign <ul style="list-style-type: none"> • Initial letter • Follow-up • Engagement survey • Recommend action • Notification of no further response • Implement corresponding campaigns in Mautic.
<p>Quarterly Newsletter</p> <ul style="list-style-type: none"> • Content to include blog posts, videos, articles, and interviews from leading open education resources around the world. Huge emphasis on creating original content. • (Budgeted for 2 newsletters) 	<ul style="list-style-type: none"> • Created new banner • Created newsletter #1 • Created newsletter #2

<p>Lead Generation</p> <ul style="list-style-type: none"> • Create/update existing social presence: • LinkedIn – none (but linked to OER Foundation) • Reddit - none • Facebook - minimal • Twitter – minimal • Wikipedia – primarily founding anchor partners (Last updated Jan 2015) • Pay per click (PPC) – Reddit, LinkedIn, Facebook – drive traffic to landing page for partners 	<ul style="list-style-type: none"> • Created consistent visual branding for Social Media • Updated info on Social media sites <ul style="list-style-type: none"> • LinkedIn • Facebook • Twitter • Created PPC campaign (ads for Facebook, Reddit, and Google)
<p>Student Recruitment</p> <ul style="list-style-type: none"> • A traditional print-based strategy, including posters, brochures, and media releases designed to engage with prospective students. 	<p>Create print resources:</p> <ul style="list-style-type: none"> • Poster template for micro-course • Created micro-badge graphics • Poster template for traditional course • Poster to promote LiDA course • Rack card • Media release (1st year of study) • Digital Presentation for OERu ambassadors • Social media content • Tweets/Facebook posts
<p>Additional</p>	<ul style="list-style-type: none"> • Marketing guidelines for OERu partners.

2.3 Implementing marketing automation software for OERu

Introducing the OERu to marketing automation approaches has by far been the most significant impact of this project.

The lead consultant sourced and introduced the OERF team to [Mautic.net](#) – an open source alternative for lead generation, contact management and email marketing. The learning curve associated with the implementation of Mautic has been steep given the complexity and sophistication of the software. Improving the knowledge of OERF staff in utilising marketing automation tools has been the most valuable professional development activity this year.

The real power of Mautic will ultimately lie in supporting OERu learners, for example: automated course announcements; distribution of learner support materials; communicating associated courses for helping learners discover opportunities for learning aligned with their interests; and lead generation for assessment services and pathways for learners to gain qualifications from OERu partner institutes.

Building our knowledge and experience of Mautic by first focusing on partner recruitment will prepare us well for designing scalable solutions for the larger learner target audience. We have successfully trialled the automation of email course announcements using Mautic during the recent prototype offering of the Creating Sustainable Futures courses developed by Otago

Polytechnic and we can confirm that these technologies will assist the OERu network in scaling the number of courses without increasing the demand for staff time at partner institutions.

Summary of OERu.org website improvements

A number of marketing improvements have also been implemented on the [OERu.org](http://oeru.org) website, including:

- New site banners which are replicated to achieve consistency across social media sites
- Media kit (<http://oeru.org/media>)
- Email lead capture on every page which links to associated Mautic automated campaigns
- A new “Join OERu page” (<http://oeru.org/invite/>) with associated Mautic campaigns.
- All the marketing collateral is hosted on the OERu site (<http://oeru.org/files>) and we’re in the process of adding links to editable versions of these files using open file formats.

3. OERF technology infrastructure

The OERF uses free and open source software for all its enterprise applications ensuring the use of open file formats and the ability for anyone to replicate our technology infrastructure. All of the original code we create to support our contributors, learners, and distribution of course materials is made available under open source software licenses, and is published through major code repositories (Github and Bitbucket) used by most open source developers globally.

WikiEducator, an instance of the open source Mediawiki platform (also used by Wikipedia), is a flagship initiative of the OERF and serves a wide international audience.

WikiEducator has 80,000 registered account holders and served over 6.7 million page views comprising 4.7 million sessions for the period of review. For the period of review, 45% of site visits were accessed using mobile devices. This is significant when considering that three years ago only 17% of site visits were from mobile devices and underscores the importance of our work in producing responsive design frameworks for the OERu course sites.

For the OERu, we have created an open source ecosystem of disaggregated services to support educators creating learning materials, partners deploying those materials as fully formed online courses direct to learners, and tools for learners to collaborate with one another and with educators.

While WikiEducator is the platform for the learning authoring of materials modelling collaborative evolution from concept to fully realised sets of micro courses, the OERu MVP technology infrastructure includes:

- email lists for each project, to facilitate a persistent discussion which serve as historical references and resources for new members of each team, all recorded as a searchable web-based archive. (OnlineGroups.net)

- a more immediate “chat” environment, ideally suited for support-related discussions (e.g. between educators and OERF staff) or more dynamic real-time conversations, including the ability to go to in-browser secure video conferencing among participants if desired. (Rocket.Chat)
- a course and project planning system to capture and track the completion of tasks, using the “kanban” method, making it easy for course development teams to track progress, annotate tasks, and assign responsibility and priorities for specific tasks. (Wekan)
- a learner-focused discussion forum, with provision for course or cohort-level discussion, and a rich “tagging” environment for categorising posts. (Discourse)
- an array of partner-branded websites, with one site per course offering. Each learner, whether in situ or remote, requires just a single account to register for any courses offered through this system, regardless of who is offering it. (WordPress multisite)
- an OERF-authored dynamic social networking system, WENotes, which scans posts from Twitter, the mailing lists, chat, forums, and designed learner and educator blogs and “harvests” content relevant (based on tags and keywords) to specific courses, automatically displaying them as a time line on the relevant course website pages.
- a platform for both learner and partner engagement including periodic newsletters to update interested people regarding upcoming events and new offerings, as well as automated rule-based lead follow-up to improve and expand responsive recruitment without substantial administrative burden. (Mautic)
- tools for recording analytics across various OERu and partner web platforms, allowing us to assess both the use of our resources and partners to assess use of their OERu efforts. (Piwik, Mautic and work on the Lunametrics learning analytics project)

We are actively developing further tools which we intend to include in our MVP including:

- a OERF developed course “resource bank” - a companion tool in which learners and educators alike can store annotated web references both for assessment and for reference and collaboration within courses. ([SemanticScuttle](#))
- a Single Sign-On (SSO) solution which would allow a learner to use their course-related user credentials to access all of our learner-related services. We will then progressively extend this system to include educator-related infrastructure as well. (wp-oauth-server through the WordPress multisite)

Many of these solutions are broadly applicable in learning environments, and with our published code and configuration/deployment instructions, we endeavour to make it easy for partners, whose representatives have trialled these tools in the collaboration process, to adopt those they found worthwhile within their own institutions at minimal cost and risk. As a distributed ecosystem without reliance on conventional Learning Management Systems we are increasing the potential for reuse and remix across different publishing and delivery environments.