PRAISE FOR THE REBUS GUIDE TO PUBLISHING OPEN TEXTBOOKS (SO FAR)

"Rebus is a godsend! I rely heavily on their amazing guides and templates; it's a thorough and thoughtful approach to creating open textbooks that both makes the process easier, and the end product better."

— Allison Brown, Digital Publishing Services Manager, SUNY Geneseo

"The Rebus guide is required reading for OER projects big and small. It helped me organize my textbook project for grant applications and anticipate potential issues on a large multi-site team. I owe the plaudits I get for organization to Rebus for creating such an accessible and practical resource!"

— Matt DeCarlo, Assistant Professor of Social Work, Radford University

"The Rebus guide is an invaluable resource that has helped me plan publishing projects within my organization. It includes document templates, links to additional resources, and great advice that save time and ensure a thoughtful approach. I'd recommend this guide for anyone looking to gain valuable insight on developing open texts."

— Alisa Lazear, Community & Content Manager, Canadian Legal Information Institute

The Rebus Guide to Publishing Open Textbooks (So Far)

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APURVA ASHOK; ZOE WAKE HYDE; AND KAITLIN SCHILLING

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You can find free copies of this book in multiple formats (web, PDF, EPUB & editable) at: https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/

CONTENTS

About Rebus Community xiii
Acknowledgements xv
Introduction 1

Part 1: Project Scoping

1.1: Project Scoping Summary 5
1.2: Project Scoping Overview 8
Considerations when getting started 8
Leadership team 10
Project definition 11
Outline 11
Selecting a license 12
Tools 13
Project expectations 14
Next steps 14
1.3: Project Summary Template 15

Part 2: Growing & Managing Teams

2.1: Growing & Managing Teams Summary 21

2.2: Growing & Managing Teams Overview 24
Why is having a team important? 24
What makes a good team? 25
What are your responsibilities to your team as a leader? 26
2.3: Building an Effective Team 28
2.4: Recruitment Guide 33
2.5: Roles & Responsibilities 40
Considerations when assigning roles & responsibilities 40
2.6: Contributor MOU Template 50
2.7: Effective Collaboration 52
Considerations for effective collaboration 52
Navigating and addressing challenges 55
Modeling being a good team member 57
Self-care 58

Part 3: Storytelling & Communications

3.1: Storytelling & Communications Summary 61
3.2: Storytelling & Communications Overview 63
Importance of storytelling 64
Guiding communications principles 64
Storytelling & communications in your OER 66
Storywork for equitable OER 68
3.3: Storytelling & Communications Template 70

Part 4: Creating & Editing Content

4.1: Creating & Editing Content Summary 75

4.2: Creating & Editing Content Overview 78
Creating Content 78
Authoring teams 79
Creation process 80
Authoring workflow 81
Remixing considerations 83
Editing Content 84
Purpose 84
Types of editing 85
Editing workflow 86
Rebus' experience 88
4.3: Considerations When Creating & Editing Content 90
4.4: Templates 94

Part 5: Feedback & Review

5.1: Feedback & Review Summary 97
5.2: Feedback & Review Overview 100
What is review and why does it matter? 100
Types of review and tools: what's right for you? 100
The review process 104
Compassionate reviewing 107
After the review 108
5.3: Review Guide Template 110
5.4: Review Statement Template 123

Part 6: Formatting & Release Preparation

6.1: Formatting & Release Preparation Summary 127

6.2: Formatting & Release Preparation Overview 130

Formatting Content 130

Cover design 131

Front and back matter 132

Print-on-demand (POD) 133

Accessibility assessment 133

Preparing for Release 134

Adoption 134

Final checks 135

Submit your OER to repositories 135

Update & involve your community 136

Telling your OER's story through promotional assets 136

Start looking ahead 137

6.3: Release Planning Template 139

6.4: [Example] Proposed Formatting Workflow 141

6.5: [Example] Formatting Accessible Tables 144

Part 7: Post-Release & Adoptions

7.1: Post-Release & Adoptions Summary 149

7.2: Post-Release & Adoptions Overview 152
OER Improvements & Maintenance 153
Timing and process 154
Editions and versions 155
Who makes these changes? 156
Your OER can live on 157
Adoptions & Measuring Impact 157
Community of practice 158
Tracking adoptions & measuring impact 158
Adoption forms 159
Measuring impact beyond savings 160

Making Open Textbooks: A Video Guide 163
Appendix: Templates 164
About the Team 165
Feedback and Suggestions 167
Accessibility Assessment 168
Licensing Information 171
Version History 172

ABOUT REBUS COMMUNITY

The Rebus Guide to Publishing Open Textbooks (So Far) was produced by the Rebus Community, an initiative of The Rebus Foundation.

Rebus Community is a non-profit organization that helps educational institutions build human capacity in OER publishing through professional development. We offer both in-depth courses and webinar series for faculty, librarians, and institutional leaders. Our programs demystify open publishing, encourage OER adoption, support faculty to author new content, and introduce students to affordable, high-quality materials. Programs are designed to connect participants to a global OER community.

We believe the most powerful tool in OER creation is an active community, and we've seen the power of bringing creators together in a shared support framework. The Rebus Community forum is a great space for discussion and networking for anyone working in open education. We also offer several free resources, including guides to making open textbooks and their accompanying video series on YouTube, as well as webinars and events. Join us and learn more at www.rebus.community.

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INTRODUCTION

Version 3.0 of this *Guide* was released July 26, 2022. For a list of revisions, visit the version history.

From the beginning, Rebus Community has always been dedicated to building a model for open publishing with **collaboration** and **inclusivity** at its core to serve the open education field's needs while highlighting the community's values. Our idea of this model has also always been that it be **replicable** and **scalable**, meaning that anyone – including you, the undoubtedly intrepid OER creator reading this guide – should be able to use it to create and adapt more and more OER without running into the limitations of traditional publishing models. From early on, we knew we had to think hard about how to actually go about achieving this vision — not only how we would develop our model and share it with the world, but also how it could then continue to grow and change over time as the community needs and values evolve.

There's no one way to meet that goal, but this guide, and how we went about creating it, is one of them. It is the result of thousands of hours of work by dozens of open textbook creators who were generous enough to allow us to join forces and learn about open textbook publishing together. We have spent many months researching, creating resources, problem solving, celebrating, commiserating, and more with the projects we've supported – all the while being responsive to their needs and learning not just from them, but also from the wider OER community.

This guide is our effort to distill that learning and experience into a comprehensively documented process for you to use, in part or in whole, keeping as true to or deviating as much from it as you choose. While it does a deep dive into the publishing process, it also includes summaries and videos for each section to give you an easier pathway in. In addition, the templates and examples throughout keep it grounded very much in the practical. This is a useful book. It's made to be used. It's also made to be used in whatever way is useful to you, whether that means reading it start to finish, out of order, in pieces, skimming quickly, or any other way you can find.

The goal of this guide is very simply to help you create quality OER, build a community around it, and in doing so, to make a positive impact in the world. Education is intrinsically tied to social justice, and the ways in which you create and disseminate knowledge shape our societies, structures, and selves. We believe that those in the classroom – both instructors and students – know best what they need to be successful in their teaching and learning. What they and those supporting them on campuses (librarians, instructional designers, etc.) don't always know is how to go about creating and publishing their content. To do so, they have typically had to invent a process, or pull together information from many sources. But, true to the open education ethos, there is no need to reinvent the wheel!

Our philosophy of creation as a collaborative act is woven throughout this guide. So is the belief that OER should be created to serve all students, with all their unique contexts, understandings of the world, needs, and goals. In this guide, we encourage you to reflect on your current pedagogical practices by keeping diversity, equity, and inclusion in mind throughout your open publishing journey, with the goal of creating valuable learning experiences that are accessible, equitable, and inclusive.

This guide offers concrete and practical steps to help you take your idea of a textbook (or other OER) and help you create this resource. It also will help you establish your OER as a robust resource being used in classrooms around the world, with a thriving community gathered around it. The steps in the guide can take place in a non-linear fashion, or be adapted to suit your project's needs as you see fit. Throughout the guide, you can see how pieces connect, and get a sense of what can happen in tandem as you delegate the work and utilize your skills in the best way. At every stage, you get to decide what works best for you. The approach is meant to be **flexible**, so whether you're a faculty member acting as lead author or editor, or a librarian or OER program manager tasked with supporting creation on your campus, we've got you covered. OER is not one and done — truly, one of the most exciting things about OER is the endless possibilities of forms it can take as another educator reuses, remixes, and iterates on what you published.

This guide is a living document, and will continue to change and improve over time. Many themes and topics of discussions with the OER community were built into this guide- so feedback is not just welcome but wanted. So, if you've read or used this guide and have some thoughts – maybe something worked well or not, maybe you came up with another approach, maybe there's something missing, or something is overly-complicated – please share them with us on the Rebus Community forum. We also encourage you to share this resource with anyone you know who is starting on their OER creation journey, or who is looking to connect and contribute to the open community.

The Rebus Community has never sought to be the gatekeepers of knowledge. We don't want to keep it for ourselves and dole it out to a select few as we see fit. Knowledge shouldn't be contained, and knowledge should never come from only one source. These principles inform the very best of what open education has to offer, and we take them very seriously. The guide is a prime example of that philosophy, and we hope it serves you well on your adventure.

PART 1: PROJECT SCOPING

Part 1 includes:

- Project Scoping Summary
- Project Scoping Overview
    - Considerations When Getting Started
    - Leadership Team
    - Project Definition
    - Outline
    - Selecting a License
    - Tools
    - Project Expectations
    - Next Steps
- Project Summary Template

1.1: PROJECT SCOPING SUMMARY

If you have decided to create an open textbook project, you might be wondering where to begin. Getting started, whether it's your first or fiftieth time, is always the hardest part! But you can begin by gathering your team around you, then start sketching out the high level details of the project, setting goals, drafting timelines, and more. This is an exciting part of the process, where you get to really think about what your project will look like, and a lot of the work you put in up front will serve you well over the coming months.

Underlying principles

Creating an open textbook is about more than just writing the content. There's a lot that goes into making a book, from planning, editing, review, formatting, marketing, and more. Part of scoping is to think about the whole publishing process, so you know what's coming. It might seem like more work than you anticipated, but this is why a good team is important, and there are lots of resources out there to support you.

Target audiences should include all readers, so keep accessibility front of mind from the start. Good accessibility practices benefit all readers, and the more that can be done during the creation process, the less remediation will be needed later. Commit to good accessibility practices from day one in concrete ways by stating it as a project goal, building it into guides, educating yourself and connecting with experts.

Reflect on the motivations and values that drive you as a person, and see how you can build them into the textbook. Highlighting them as unique aspects of your project and emphasizing their importance will also help your collaborators feel like they are working towards a larger goal. The reasons why this project is important enough for you to commit to it will almost always resonate strongly with others — so share your story.

Remember that you're not in this alone. Making books is not a solo effort by the author, so make sure to find your community and let them support you. They are there to believe in your project's purpose, set it up for success, celebrate milestones, and help pick you up when you think you're not making as much progress as you'd like.

Plan, revise, and plan again. Take the time to make a plan up front. Prepare timelines, draft book outlines, map key concepts, strategize marketing plans so you can check-in regularly to see if you're meeting targets, and if not, recalibrate! Clear project documentation also means that newcomers can get on board quickly, and you can always refer back to what you've written to keep on track.

Who's Involved?

While your team will continue to grow as your project progresses, it's the leadership team that will be most involved during this phase. The leadership can consist of an admin team to help with more day-to-day tasks, and an advisory team to guide the process at a higher-level, but can also be less formal – the important thing is that there are a core set of people committed to establishing the project. Learn how to build a leadership team in this section of our guide.

An admin team may include:

- Librarians interested in or in charge of developing OER at your institution
- Instructional designers or others from your institution's centre for teaching and learning
- Colleagues or graduate students in your department
- Collaborators on other projects from outside your institution
- Authors or editors already attached to the project

An advisory team may include some of the above, as well as:

- Senior experts or mentors in your field
- Anyone you know with experience publishing textbooks or open textbooks
- Community advisors (this is crucial is you are working on content relating to/impacting a specific community, especially marginalized communities)
- Subject librarians
- Instructors with experience teaching the course for which the resource is intended

Key Tactics

If you're working on an open textbook project, here are some things to do at the very start in order to be better prepared to manage and execute the publishing process:

- Read about the publishing process, and what really goes into making books (this Guide is a great place to start!).
- Work to articulate why your project is important to you, and share this with your team, along with clear expectations about their roles in the project. Keep this documented and read it over and share it whenever you need a reminder.
- Create a public project listing with key information like book summary, audience, reading level, licenses, target release date, etc. This public listing will be the first place you point people to in communications to learn about the project, so make it clear and keep it up to date!
- Start creating the book's outline, including any necessary context or framing up front, plus a list of chapters with descriptions, pedagogical outcomes, and the types of features or elements that will recur through the text.
- Work with your team to create a rough timeline – this can and likely will change over time, but plotting a first version will help you estimate timing and give you some initial milestones to work to.
- Ask for help when you need it. Look to your institution, colleagues, students, the Rebus Community and the academic community more broadly to help.
- Distribute the workload among your team members and look for other possible assistance. There may be specific resources, grants, or funding opportunities available to you, so keep an eye out.
- Decide on the various tools you will be using for project management, communication, writing, editing, review, and formatting.

1.2: PROJECT SCOPING OVERVIEW

Where to begin?! Getting started with your open textbook project is always the hardest part. Before you get into full-swing of things with your project, here are some critical pieces to think about.

First up, you should know about some of the (many) things that go into publishing a textbook: planning, project management, recruiting, writing, editing, peer review, formatting, accessibility review, printing, storytelling, or marketing. Some of these might happen simultaneously, and not every project will take the same approach to all of them, but remember, **there is more to creating an open textbook than just writing the content**. Producing an OER involves all of these many stages, and this is why careful planning can help you do this work in more efficient ways.

Thinking about the process of creating the book from the very start, and planning things out early will only make it easier for you and your team down the line. While it may seem overwhelming at first, work through it together, and your future selves will thank you for it!

Read on to explore the whys and hows of scoping out and starting on your open textbook project.

Considerations when getting started

This chapter will guide you through defining your project scope and expectations. Having a clear understanding of the purpose and goals of your OER is critical to a successful publishing process. Figure 1.1 outlines the publishing process — you'll see from the circular shape and multi-directional arrows that **much of the work is indeed recursive**. Some of these production stages may happen simultaneously, and not every project will take the same approach to all of them. In this guide, we'll explain the importance of each stage of this cycle so you can self-determine what pieces of this approach are going to be most valuable or pertinent to your work.

You'll notice that our process doesn't separate out things like accessibility, designing with equity, student considerations, or marketing — we consider these core practices that are embedded at every stage. Keeping these principles in mind throughout the publishing process promotes a culture of respect, support, and inclusion which shows through in our final OER. We think this approach can help you have, and can have impacts beyond improving the quality of your OER. We believe this approach is helpful to create valuable resources that center student experiences, create equitable classrooms, and genuinely support student success. With each OER you create and use, you can bring a transformational shift to education as we know it.

Fig 1.1: An overview of the Rebus publishing process.

Thinking about accessibility as you are planning, writing, editing, revising, and formatting content will ensure that everyone can access your book from the moment of publication. Good accessibility practices benefit all readers, and the more that can be done during the creation process, the less remediation will be needed later. Through this guide and your OER production process, we hope you will reframe how you think of disability and shift the idea of accessibility away from something that needs to be accommodated, and instead to a means by which you can make space for and value diverse experiences (Arley Cruthers & Samantha Walsh, Disability-Informed Open Pedagogy).

We also encourage you to reflect on what other **motivations and values** you bring to the table, and how you can build them into your open textbook. This might mean building a diverse and/or international team, developing content that reflects the experiences of your students, or pushing the boundaries of traditional teaching practices.

With all that in mind, let's acknowledge something right away: you'll likely find yourself saying at many stages of the process "this is a lot of work". Creating an OER is no minor feat, but we want you to remember that **you don't have to do it alone**. There are plenty of people who are willing to assist you, so **you shouldn't be afraid to ask for help**. Look to your institution, colleagues, students, the Rebus Community, and the academic community more broadly to help. There may also be specific resources, grants, or funding opportunities available to you, so keep an eye out! You should also be sure to step away from the project and take time off as needed – it's important to look after yourself and keep things in perspective. Remember that it's okay to put other priorities before your work on the project and deadlines.

Finally, your project, and the work that goes into making your open textbook, is worth talking about! We strongly believe that **storytelling is built into every stage of the publishing process**, and starts right now. You may want to make announcements that you're beginning a new project, that you're excited about what will happen, and that you'll keep others updated along the way. This is not only a great way to gather contributors and encourage eventual adoptions of the textbook, but also a good way to celebrate small victories and milestones along the way. Onward!

Leadership team

Forming a leadership team around your project is just as important as curating the content for your book. With the right leadership team, you can distribute responsibilities, keep the project driving forward, and ensure that it runs smoothly. There are many different approaches to forming this team, and not everyone has to sign up for a big workload. You may want to have a core leadership team that focuses on the project's day-to-day activities, as well as an advisory team to help steer the project in the right direction as needed.

Once you have recruited all the members for your leadership team, we recommend that you begin with introductions and **assigning clear roles**. For instance, you may be the team's Project Manager, and may want to assign roles such as Lead Editor, Lead Author to other members. Each role comes with its own set of **responsibilities**, so make sure to lay these out when assigning roles. As Project Manager, you may be responsible for keeping track of the project and ensuring that it is on track for publication. Other responsibilities might include communicating project updates to the team, scheduling and running meetings, and assisting with recruitment efforts.

Laying out the responsibilities upfront will avoid members from taking on more than they can commit to, and help you clearly **distribute the project workload**. Creating an open textbook is no small feat. It takes a lot of time, and can often be more work than initially anticipated, but with a competent, committed project team, where tasks are evenly distributed, you won't have to worry about too much falling on your plate or feeling overloaded.

As you move forward with your project, keep in mind **other resources** that you could tap for assistance. You could look for students, colleagues, research or teaching assistants, and other volunteers to help with certain tasks. The Rebus Community is also a great way to find people outside your own network to help with different pieces of your project.

And finally, it's important that you **find your community and support team**. Having a community of people who believe in your project's purpose, want it to succeed as much as you do, can celebrate milestones, and can pick you up when you think you're not making as much progress is key. Start with your leadership team, and build the community as you get your project off the ground. You won't regret it!

Project definition

Once you have your leadership and advisory teams together, you can start getting into the details of what your project is all about. **Defining your project** is important not only because it helps you and your team understand what you're working towards, but also as it helps provide vital information and framing about the project to those interested in participating. By being as clear and detailed as possible upfront, you can be sure that collaborators coming on to your project at any time have the same understanding, and know exactly where they can contribute.

There's no limit to the amount of information you could include on your project's public listing page, but we recommend starting off with a few sentences **explaining why this project is important**. Your project might be the first of its kind in a particular field, model a new approach to a certain course, or it might just be exactly what you need for your own teaching. Highlighting any unique aspects of your project and emphasising its importance will help your collaborators feel like they are working towards a larger goal.

You should also include a **brief summary of your project**, and of the open textbook that you are working to create. This needn't be very long – a few paragraphs should suffice!

At this stage, you'll also need to make some **high-level decisions** about your project. For instance, you'll need to decide what **license** to apply to your book, what **audience** you would like the book to target, and at what **reading level** content should be aimed. In cases where projects are receiving grants or funding from organizations, you may need to adhere to the requirements in the contract. As you finalize this information, make sure it's clearly recorded and shared with everyone on the team.

One of the final tasks is to **prepare a rough timeline** that outlines the various stages of the process. It's crucial for you and your team to have an idea of how long tasks take, and when their contributions might be due. We've realized from our work on numerous projects that timelines are never set in stone, and that no matter how hard you try, things can often take longer than planned. So try to revisit, refine, and revise the timeline periodically, and update your team of any changes.

Outline

The next step after writing out your project description is to create an outline for your book. Just as the project definition provides the **necessary information and framing** about your project, the outline will do the same for the textbook. We encourage you to prepare an outline at this stage, and before you begin recruiting authors or other contributors, because you have a clearer sense of the project's goals and the type of resource you are hoping to create.

The outline itself can be fairly simple. It should, of course, contain a **list of all the chapters** to be included in the book, along with **detailed descriptions** of each. Writing out descriptions of the chapters will help you map out the content in your book, and ensure the scope for each is clearly defined and within the scope of your project. You may choose to have individual authors develop the outlines for their chapters, but whenever this happens, making sure they are consistent will help ensure that the final text is cohesive.

It's also helpful to include **features or elements that will recur through the text**, such as case studies, learning objectives, assignments, etc. If possible, you can briefly sketch the structure of a model chapter which includes all these elements. You can also use the outline as an opportunity to **map key concepts** that will be covered in the book, so that they are not repeated in different chapters.

Lastly, you can consider the **pedagogical outcomes** of the book, and think of ways to gesture towards these in each chapter. Doing so may prompt you to rework chapter descriptions or add standard elements, but these changes will be crucial to ensuring that the resource becomes a valuable one for students.

Selecting a license

When selecting a license for your OER, we encourage you to pause and think about what you'd like your resource to support, achieve, or what impact you'd like it to have.

Creative Commons (CC) licensing conditions are the most widely used to license open materials. All Creative Commons licenses (expect the public domain dedication) work with copyright — meaning that you as the creator of an OER still need to be cited, credited, or attributed when someone uses or remixes your work. Open licenses simply grant upfront permissions on what someone can do with your OER. Read our licensing guide to learn more about the CC licensing conditions.

Review the conditions and these contextual considerations before making a decision on how to license your OER:

- Are you adapting a resource that already has a license? If so, what are the constraints you need to follow?
- Is there a protocol for knowledge you'll be sharing in the resource, especially if this knowledge belongs to communities that you are not a member of?
- What is your envisioned use for this resource? How can the conditions of a license restrict or enable

these goals?

It's important to note that very permissive open licenses may not work for all content, contexts, or creators. Selecting an open license means making a deliberate choice that values sharing, ownership, and attribution of the work that's being done by you and everyone else!

Tools

This sounds straightforward, but it's important to have the right tools for **managing your project**. Tasks, reminders, and deadlines can begin to pile up very quickly, and if you don't have your tools laid out at the start, it can be challenging to track your project's progress.

The Rebus Community forum is a great space for discussion and networking for anyone working in open education, designed to guide you through the open textbook publishing process and make it easy to find, recruit, and organize collaborators. No matter the stage of your project, the Rebus Community forum is a place to build your team, discuss your book's progress, and attract potential supporters.

The forum is a work in progress and new features are being released regularly, so keep an eye out! If you find that this forum doesn't do what you need it to, or would prefer to use another system, we've found Google Spreadsheets to be very helpful for keeping track of all the moving parts on a project.

It's also helpful to decide on **channels of communication** with your project team and leadership team. You can use the discussion option in the Rebus Community forum, Twitter, Slack, or email in any combination for day-to-day communication, and use video conferencing via Zoom, Skype, or Google Hangouts as needed. Take into account where your collaborators are located – if they are in different time zones than you are, an asynchronous mode of communication might be preferred. Other team members may also have varying access to fast or reliable internet, so video calls are not always the best option.

Lastly, you should also consider what **software** you will use for authoring, editing, formatting, and publishing your book. You could edit and revise your book in Google Docs, and use the Rebus Press (powered by Pressbooks) for formatting and publishing if you're working with us. Otherwise, you could work in other editing interfaces, such as Pages, MS Word, and with other formatting softwares, such as InDesign – but remember that these options don't always produce a range of formats, which can impact on how well a text can be accessed by students, and by others who wish to reuse & remix your content. Selecting your tools at the start lets you focus on refining content at every stage, instead having to make process decisions as you go.

Project expectations

Open textbook or OER projects can quickly grow to become quite large as volunteers and collaborators see the potential impact of the book being created. It's important that you **reiterate your project's scope** to your team – what are you hoping to achieve in the first edition? What tasks and materials have already been set aside as future work? Whenever possible, **remind your team about the project's workload and timeline**. Letting others know that there is a clear plan of action towards publication will help allay stress and anxiety. And if needed, **revisit your project's timelines** so they are attainable, instead of just aspirational.

Next steps

Once you're ready and feel like you have a good grasp on your project, you can **start spreading the word**! As mentioned earlier, marketing is something that should be built into every stage of the publishing process, and promoting your project from the start will lay the groundwork for publicizing the book, finding collaborators, and encouraging adoptions in the future.

You can also **begin recruiting** editors, authors, or other volunteers as suits your project. Remember to welcome each new member to the community, introduce them to the team, and encourage them to share the news about the project!

1.3: PROJECT SUMMARY TEMPLATE

This template may be used as you're starting to define your project. Find an editable version here.

Project Summary: [Project Title]

Lead editor/author(s): [Name]

Overview

A brief summary of your OER. Explain how the project came about and its importance. ***What do you hope this resource will achieve?***

Motivators

Identify the primary motivators that drive this project.

Course and Audience

What courses will this OER be used in? Identify both the primary student audience (academic level, discipline etc.) and any secondary audiences (instructors, researchers, professionals, other interested parties).

Significant Learning Outcomes

- Articulating the overarching learning goals will guide you in the process of locating useful resources and/or creating your own.
- If the OER is assigned to be used in a particular course, list and revise the course outcomes.
- **What do you want students to learn that will still be with them several years later?**
- Think expansively, beyond "understand and remember" kinds of learning. Use this as an opportunity to build your dream course.

Course Materials Needed

Think about the teaching environments in which your OER will be used. Identify what materials you will need in addition to a core textbook or ancillary materials. You may want to list and link to items like a syllabus, assessments, lesson plans, teaching aids, etc. List these out below.

Structure

1. If you are creating a textbook, **how will the textbook be structured?** (e.g. 3 parts to every chapter, student-facing text plus instructor handbook etc.).
2. Will you be drawing on existing OER? In what ways?
3. What (if any) accompanying elements (e.g. instructor resources, presentations, quizzes, maps, data sets) will be produced or collected? If you are creating these **ancillary materials**, how would these be structured?
4. **What voices and representations will you want to use to help convey specific information in your OER?**

Licensing

Explain what license the OER will carry and why. You may want to link to external resources where readers can go for more information on the CC BY license, such as the Creative Commons website, or the Rebus Community Licensing Policy.

Anticipated Timeline

Provide an approximate timeline for the project. This doesn't have to be comprehensive, or rigid, but an indicator of dates for major milestones (e.g. chapters submitted, editing complete, peer review complete, layout, accessibility review, initial release, classroom review, etc.).

Measures of Success

- How will you know if you've met your goal?
- What constitutes success, and how will you measure it?
- Consider indicators along the production process like number of participants, diversity of perspectives (geographic, cultural, social, etc.), feedback opportunities, number of adoptions etc.
- Also think about student success beyond traditional metrics of grades and focus on deeper learning measures. Do students feel joyful and empowered in the course?

- These don’t have to be comprehensive, but help to clarify what success means to your project, beyond just writing a text

Find an editable version of this template here.

PART 2: GROWING & MANAGING TEAMS

Part 2 includes:

- Growing & Managing Teams Summary
- Growing & Managing Teams Overview
    - Why is having a team important?
    - What makes a good team?
    - What are your responsibilities to your team as a leader?
- Building an Effective Team
- Recruitment Guide
- Roles & Responsibilities
    - Considerations when assigning roles & responsibilities
- Contributor MOU Template
- Effective Collaboration
    - Considerations for effective collaboration
    - Navigating and addressing challenges
    - Modeling being a good team member
    - Self-care

2.1: GROWING & MANAGING TEAMS SUMMARY

The idea that books are the work of a single person, the author, is a bit of a myth, really. In reality, it takes a village to create any book. Even single-author or self-published book will have editors, proofreaders, designers, and ultimately, readers who come to form a community around the book. Creating, publishing, and sharing knowledge is not a solo endeavour!

This section will cover what to keep in mind as you're building and managing a team as part of your open textbook project.

Underlying principles

Teams come in all shapes and sizes. Whether you're a team of four or forty, it's important to have people who are invested in the project, and believe in its mission and goals.

It's not just about sharing the workload. Having a diverse and representative mix of people on your project lets different perspectives and experiences shape the book, so it's not just a product of one person and actually reflects the experiences of readers.

Communication is the key to a well-functioning team. Set up clear expectations about what needs doing, and be sure to communicate clearly and frequently with your team to avoid delays and surprises.

Every team needs project champions or cheerleaders. Reminding your team about successes along the way, and having someone cheering them on at each step does wonders for team morale. Not only will this lift spirits, but may even encourage team members to do more for the project by adopting or marketing the book.

Who's Involved?

As you start to put your team together, make sure you think about the many combinations of people you can ask to be involved. Teams behind OER aren't just a homogeneous group of people with the same experience or role. And this is for the better! We've often seen OER and open textbooks projects include:

- Project leaders
- Contributors at all scales
- Students (graduate and undergraduate)
- Advisors or some form of wise counsel
- OER champions or advocates
- Institutional supporters, eg.: instructional designers, librarians, accessibility experts, etc.
- Interested observers
- Potential adopters
- Community members

Key Tactics

If you're leading a team, here are some things you should keep in mind to nurture your team, so it grows into a thriving community of practice around your OER:

- Appreciate the value of collaboration, and model being an active, engaged team member.
- Develop community guidelines and practices (e.g.: MOUs, contracts, or other agreements) to create a safe environment and clarify expectations for your team.
- Ensure clear documentation on project goals, roles and responsibilities is available to all team members and kept up to date.
- Identify and clearly articulate key roles and responsibilities needed for your OER, along with your project goals, and keep this documentation up-to-date for all team members.
- Be kind,understanding, and recognize the efforts of each contributor, big or small – everyone is juggling responsibilities and we're all only human!

Ultimately, having a team around the OER ensures that the project will be an easier and more enjoyable experience, and that the resource will be more valuable and valued – so try to make your project a social, collaborative, and overall fun experience!

Read on to explore the whys and hows of building a team for your open textbook project.

2.2: GROWING & MANAGING TEAMS OVERVIEW

Making (and reading) an OER is a collective effort, so it's important to start thinking early on about who you want to have involved in your project, what they bring to the table, and what they can give and get from being a part of the team. This section of The Rebus Guide to Publishing Open Textbooks (So Far) will help you effectively collaborate with your team, identify key roles & responsibilities needed for your OER project and how you can recruit new members to join your project, and more.

Why is having a team important?

Teams bring a number of benefits to a project, and open up the potential for you and your resource to have an even bigger impact than if it were just you chipping away at the book.

A team around your textbook ensures that you have:

- people to help share the workload
- different perspectives and experiences that feed into the creation of the book
- varying areas of subject expertise and knowledge
- the option to draw on others' time, skills, and expertise as the need arises
- built-in networking
- built-in marketing for the book
- a pool of potential adopters
- others invested in the long-term maintenance of the book
- an enjoyable, social, collaborative, and overall fun experience!

Research shows that a *diverse* team encourages innovation, creativity, thinking, and can help you create a resource with a wider reach. For instance, diverse teams can help ensure that the book's content is reflective of the world that learners inhabit, can help develop exercises or examples where all students can see themselves, and ultimately see to it that the resource does not reinforce the status quo or perpetuate stereotypes. A team that includes not just subject matter experts, but also instructors who have taught or will be teaching with the resource, can also make certain that the resource has a practical value in classrooms and to students.

What makes a good team?

Good teams don't always form naturally, but often need to be carefully cultivated and looked after! A team is a living, breathing, group of people who need communication, time, attention, and shared understanding to keep working efficiently and happily. We hope these tips will help you cultivate an engaged group of people around your project.

1. Make sure that your team consists of **people who are invested in the project, and believe in its mission and goals**. Your onboarding process for each team member should include a summary of the project's purpose and if possible, a few emphatic sentences from you about why you are involved or what drives you about the project.
2. Encourage members to be **upfront about their workload**, and what they can (and cannot) commit to. With open textbook projects, which are mainly volunteer-driven, there is often no shortage of tasks to complete. You don't want to overburden your team, cause burn-out, or any ill-feelings towards the project.
3. Make sure everyone understands the expectations of a given task when they take it on – you want to be sure that **people complete what they have agreed to work on**. A good team consists of everyone checking off their list of duties, no matter how large or small.
4. **Communication** is integral to a team's performance. Work on creating an atmosphere that encourages team members to talk to one another, share their progress on tasks, and indicate if they require more time or assistance, etc. The more interactions your team members have with each other, the less isolated they will feel, and the stronger the community around the textbook becomes.
5. Each team needs a leader, but with open textbook projects, teams **need more than formal leadership**. As opposed to someone who is just shooting off commands or assigning tasks, open textbooks require **project champions** who will motivate and update the team, and in so doing, push the project forward. When you find these people, do everything you can to keep them!
6. With a wide group, it can seem difficult to help everyone get along and complete their work, but the key is to make sure that **each person on the team feels valued**, feels like they belong, and are satisfied with their contribution to the project.
7. Good teams ought also have a **mix of people** involved, and should be **representative** of the people who will be using the content. This diversity will help shape the resource through different lenses and perspectives, making it more applicable and useful to a range of users.
8. If the content you're working on involves traditionally marginalized communities, make sure you have representatives from those communities involved from the beginning – always remember, **"nothing about us without us."**
9. No two teams will be the same, and neither should their **measures of success**. A good team will define the intended outcomes of the project together, setting realistic goals for the group and for individuals

based on the resources at hand. A team of five people might not be able to take on as much as a team of fifty, but that's okay! Celebrate each completed task and milestone, and think of it as taking your team closer to the final goal.

Now that you know what makes a good team, you can begin putting this group together. Take a look at our recruitment guide to see how to find and onboard new members to your project.

What are your responsibilities to your team as a leader?

Good teams need nurturing and there are a few things that you should do to be a better project lead. This might go without saying, but **be nice** to everyone volunteering their time and energy! While you ought to remain focused about the project and its goals, you should also constantly remember that everyone on the team is only human. The **well-being of the people** on the team is just as important as the project itself, so **be understanding** when things don't go as planned. As a manager, you need to see to the overall well-being of your group, but also not at the expense of yourself. This is a hard balance to achieve, but hopefully the tips and suggestions below will help!

Here are some other strategies you might find useful:

- The best way to be a good project manager to your team is to **be open and transparent** about the project and related tasks. Make sure to give your teammates all the information they need upfront, and be clear about what you expect them to deliver. Setting clear expectations at the start of the project, and keeping the lines of communication open throughout the process is key.
- If possible, you may want to develop **team or community guidelines** that you can share with each new member that lay out these simple expectations. In addition, as the lead you should set an example for the team, and **stick to your deadlines** for any task that you have committed to doing. It's important that you do your portion of the work, or **give enough warning** to your teammates if you can't complete it on time – and be clear that the same is expected of everyone on the team.
- Ask all contributors to **sign a Memorandum of Understanding (MOU)** at the outset of their involvement in the project, to clarify their roles and responsibilities in relation to the larger team. This document can help you clearly summarise your project and its goals, as well as the responsibilities and expectations of each collaborator. You can use our MOU template and adapt it to your project, or create your own. In the spirit of collaboration, make sure to sign the MOU yourself, so volunteers are aware that the same expectations and standards apply equally to them and you – and make sure you follow through.

- If contributors have any questions for you, either at the start of the project or later down the line, be patient with them and do your best to **answer their queries, even if the information is available to them elsewhere.** As mentioned, volunteers will likely be juggling many different tasks, projects, and responsibilities, so they might forget details related to your project or get confused with their specific task. Here too, be patient and kind with interacting with them – it will make their experience of working on the project all the better! And on a practical note, keep as many of these exchanges public as possible, so everyone benefits from the responses, make sure any questions really are answered in your documentation (updating them if need be), and maintain a running list of FAQs that you can point people to.
- Throughout the course of the project, be sure to **recognise your volunteers and their time with consistent gratitude**. Acknowledgment of their contributions and commitment goes a long way.
- Make the experience an enjoyable one! Do your best to i**nclude some informal social time** to catch up, discuss the weather and say hellos when you meet, during calls, or digitally, before getting down to business.
- **Give regular updates to all team members** about the work taking place elsewhere on the project – this helps to make them feel connected to the bigger picture and can help motivate them to complete their own contribution. Regardless of a volunteer's contribution to the project, this helps to make them feel like they are part of the team working towards a common goal.
- Keep in mind that people on your team may be from different backgrounds, and as such, might face different challenges or have different needs when completing a task. It's important that you don't force your way or method of working on your fellow volunteers, and instead **let them decide how best they want to forge ahead with a task.** Remember that just because something is different, doesn't mean that it is wrong.

Most importantly, try to be understanding and empathetic about your teammates. As a manager, you should provide contributors with a clear platform to voice their concerns, and also be clear about what decision-making processes look like in the team. Let volunteers know what your responsibility is to them and the project. Tell them how much time you plan to devote to the project, so they can see you meeting their commitments with your own.

Ultimately, having a team around the book ensures that the project will be an easier and more enjoyable experience, and that the resource will be more valuable and valued! Continue on to the rest of this section to see how best to form this team, manage and recruit collaborators, and keep everyone motivated and engaged.

2.3: BUILDING AN EFFECTIVE TEAM

Seeing an OER project through from conception to release is no easy task, especially if you are working as the solo project manager, coordinator, or lead. But, with a good leadership team, you can **share the load and responsibilities.** The right team will make all the difference – helping drive the project forward and ensuring that it runs smoothly.

Having a group of people at the core who are working together to plan, lead, and see a project through to completion also allows you to draw on a **range of perspectives and expertise.** Each individual is unique and comes to a project with their own lens, background, and skills. These powers combined can strengthen your project, make the resource more accessible, and make the collaborative experience more inclusive.

Through providing input from people with varying perspectives and skills, the leadership team can also help with **complex decisions** that arise along the way. They can act as a kind of governing body, committed to helping the resource become as valuable as possible.

This group also lets you expand your network, meaning you have a wider reach when recruiting collaborators, and promoting your resource in the long term. And, as an added bonus, it allows you to meet different people passionate about working in Open Education and improving the resources available in your field! As with any collaborative project, an open textbook is an opportunity for you to grow your community and learn more through shared work.

What does the leadership team do?

There are several different approaches you can take to leading a project, and **not everyone has to sign up for a big workload**. One approach is to have both an **admin team** that focuses on the project's day-to-day activities, and an **advisory team** to help steer the project in the right direction as needed.

The admin team can be charged with the **day-to-day managing** of contributors, tasks, deadlines and other project work, working together to keep things moving forward steadily. Typically, admins will also be contributing to the project in other major ways (as an author, editor, or filling in other gaps like formatting, arranging print on demand, etc.).

In contrast, an advisory team (a.k.a. steering committee, brains trust, etc.), can be established to **guide the process at a high level**. This team can set the 'big picture' goals for the project, or measures of success.

They can assist with decision-making, mediate conflict, and provide wise counsel as needed. This group should ideally be proactive, rather than reactive, in the face of challenges, and so will rely on the admin team to keep them up to date on what's happening. And, while they might not be involved in the day-to-day, advisors are still a great channel to promote your project and find new contributors!

While it may not be possible for every project to have both of these teams, keep in mind the roles they play as you bring together your project leads and make sure you have a mix of people with different responsibilities in a way that works for you.

Specific duties and expectations

As with any collaborative project, it's good to clearly state the duties, responsibilities, or expectations for each team member. Doing so can help to avoid confusion or conflict down the line, and keep everyone on the same page. While not exhaustive, the following lists should give an idea of what the two teams might be responsible for.

Admin team:

- Defining the project
- Preparing project-related documents such as guides, templates, calls, etc.
- Managing the project's public listing on the Rebus Community platform
- Sharing calls for various contributors
- Talking to potential volunteers and onboarding those who are selected
- Tracking content and the project's progress
- Reaching out to people and sending regular reminders
- Engaging with the team
- Conducting a developmental edit on the content
- Reading the resource before it is released
- Acting as a backstop for others on the team
- Clarifying roles and tasks for team members
- Running conference calls with authors or other volunteers

Advisory team:

- Providing input on the project's definition and direction, and the content
- Setting broad strategic objectives for the resource
- Making sure that these goals are met
- Ensuring the team includes diverse perspectives, which are also represented in the content created

- Mediating conflict
- Acting as an impartial body and advising the admin team on decisions
- Helping find and recruit volunteers
- Attending meetings or calls
- Promoting the project from conception to publication

Finally, make sure you discuss any other expectations with the whole leadership team, and spend some time considering decision-making strategies that you can employ over the course of the project. You could also sign a Memorandum of Understanding (MOU) with each member of your team to be certain that you are on the same page regarding their position in the project. We've prepared a template that you could use, or adapt.

Recruiting members for both teams

Thinking about the different roles, you can also consider who is best placed to help lead the project, and what expertise they can bring.

The admin team will likely have more of a direct impact on the content, and need to be committed to being hands-on with the project. Experience with open textbook publishing is a plus, and you'll be working closely with them, so they need to be reliable! Here are some of the kinds of people who might be involved:

1. Librarians interested in/in charge of developing OER at your institution
2. Instructional designers or others from your institution's Center for Teaching & Learning
3. Colleagues or graduate students in your department
4. Collaborators on other projects from outside your institution
5. Authors or editors already attached to the project

In addition, when it comes to the advisory team, think about:

1. Senior experts in your field or mentors
2. Anyone you know with experience publishing textbooks or open textbooks
3. Community advisors (this is crucial is you are working with a specific community or with Indigenous knowledge)
4. Subject librarians
5. Instructors with experience teaching the course for which the resource is intended

Another thing to consider when forming both teams is whether they are **diverse and representative of the**

professionals in your field. This might mean looking outside your existing network, and considering people who might not otherwise be considered for this kind of project (e.g. graduate students).

In addition, including **instructors with experience teaching the course** you are working with means you are more likely to compile a resource with practical value in the classroom. Look for members who have **expertise in the subject**, are **organized**, **committed**, and **buy-in to** the reasons for creating an open resource. It's also important to consider people's **time commitments**, as being part of the admin team can be a lot of work. If they aren't able to commit, an advisory role might be more suitable.

You might also be wondering **how many people you will need**. Unfortunately, there's no secret formula – it really depends on the project! You should aim for enough members that no one person is left doing all the work, but not so many that no one is clear on who is doing what. And no matter how many individuals you end up recruiting, it is important for them to have a clear understanding of their responsibilities.

Our recruitment guide lists the strategies you can employ to find your team, so have a look through it when you're ready to start looking for people.

Examples of leadership and advisory teams in action

As we mentioned in the introduction, this guide has been developed based on our experiences working with many different open textbook projects around the world. Given that experience, we wanted to share some examples of both leadership and advisory teams in action, so you could better understand their role and importance in the open textbook publishing process.

One of our pilot open textbook projects, *From the Ground Up: An Introduction to North American Archaeology*, set up an advisory team from very early on. The book itself sets out to offer a broad overview of the diverse groups that have called "North America" home for over 10,000 years and how lessons from the past are relevant today. The advisory team comprises a number of subject experts from various kinds of institutions. The project lead, Katie Kirakosian, explains its purpose:

> The Steering Committee was formed to help guide the larger process for creating this open textbook. This Committee will be following the progress of each component of this project and preparing for upcoming milestones (i.e. sending out sections for review, marketing the textbook, etc). Steering Committee members may be asked to offer their advice if/when issues arise that need to be discussed by an impartial group that knows the landscape of North American Archaeology quite well. The goal is for the Steering Committee to be proactive versus reactionary in this progress by focusing on addressing the complex and varied needs and potential challenges during the life of this project. **If you have a concern arise while working on this project, email Katie Kirakosian directly who can offer advice or bring**

the concern to the attention of the Steering Committee, if necessary. Please do not email the Steering Committee directly!

Another pilot project, *Introduction to Philosophy*, needed a large, dedicated admin team due to the sheer size of the resource being created. The project aimed to create a series of open introductory texts, each in a different sub-field of philosophy. To wrangle a project of this size, each individual text has its own editor, with a series editor overseeing the whole operation. As of writing, the team comprises nine people, located across North America, Europe, and Africa, with two other slots to be filled in future for the remaining sub-fields. While each editor is responsible for the content and contributors in their own portion of the series, they also collectively make decisions about editing and review processes, write or provide feedback on guides, assist with recruitment, and more.

Other projects have been successful with a smaller leadership team, consisting of just a project manager and lead author. In these cases, the subject expertise of the lead author was well-balanced with the more operational input from the project manager. Together, the duo was able to define the project, create calls, manage content, assess the project's progress, and more.

As you can see, teams come in a different shapes and sizes! And that means that with a bit of reflection on what you have and what you need, you'll be able to find the approach that best suits you.

2.4: RECRUITMENT GUIDE

There are numerous benefits to having a team around your project – to help share the workload, keep you motivated, and improve the quality and impact of the final resource. Without a team, you may not be able to complete your project, or might take a very long time to do so. Take a look at our overview of building a team for more on why teams are important. Once you've worked through scoping your project, chances are you'll see a number of different places where you could use some extra hands.

Given the need for extra hands, most teams will likely have at least some volunteers involved. Volunteers are, to put it simply, people who believe in your project and are willing to devote their time and expertise to it without much (or any) financial compensation. The fact that many volunteers will be expending time, energy, and more on your project without any payment, makes their contributions all the more valuable.

It's also important to remember that even those who are compensated in some way, or who have a mandate in their day job to support OER (so might not be officially considered volunteers) are likely to be putting in more than they are paid to do. Many of the people involved are likely to be contributing to a project because they believe in it, and it's important for managers to be aware of that and not take advantage. Project managers, and indeed the whole team, should recognise the value of the labour put into a project and find ways to make sure it is recognised and rewarded in a variety of ways, not just financial compensation.

Volunteers, whether officially designated as such or not, come with all sorts of wonderful skills that you might not have yourself – so recognize the value they bring, and most importantly, don't take them for granted!

Before recruitment

Before you begin finding people to help, we recommend taking a few important steps to prepare.

Define what you need

The first step is to think about and write out the details of what you need someone to do, which might take the form of a job description. You might be looking for chapter authors, peer reviewers, or editors, but the job description helps you clearly lay out their specific duties. Try to be **as precise as possible** – you should **list out the various tasks, expectations, and/or responsibilities** of the new contributor. In so doing, you should also get a sense of the time commitment needed on the part of the contributor, include an **estimated time**

frame for the job in the description – this is not only for you to keep track of the contributor's workload, but also so that interested volunteers have a sense of how much time they will need to devote to the project.

Once you've been through this process, we suggest you preface the details of the task or job with a brief summary of your project and the work that has been done so far, then finish with information on how to volunteer or participate, and who to contact with any questions. Here's a sample job description for a part editor on an introductory philosophy text.

Decide who you need

Once you have a sense of the various tasks that a contributor would need to complete, you can decide on any critical requirements or criteria potential contributors should fulfil. This is a way of ensuring that you find the right person (or people) for the job, and you can be as broad or specific as needed. For instance, if your project is to create an open textbook for introductory philosophy, as in our example above, you might be looking for "faculty or PhD students (ABD)", but you can also list things like "experience teaching first-year philosophy courses" as a requirement for chapter authors.

Depending on the task, however, you might find that these criteria are more of an added bonus than an absolute requirement. For instance, a copyeditor on a Hispanic Literature open textbook project would need to be fluent in Spanish, but a cover designer might not need the same level of fluency.

Once you're clear on any requirements, make sure to add these criteria to the job description so they're clear to anyone interested in volunteering.

Figure out the logistics

Recruiting new collaborators is a team effort (no pun intended), but to avoid any confusion, it's best to **figure out who is responsible for what** to make sure it all goes smoothly. The two major tasks are: sending the calls for contributors and collecting the responses. In some cases, such as during the peer review stage, it might be obvious that the review coordinator is the one in charge, but it might not always be so clear cut. Make sure you speak with your team about who will send out calls for contributors through which channels (everyone should have a hand in here! You all have your own networks to tap into) and who should field the responses and any questions (this should ideally be one or two people at most to avoid crossed wires).

Write and refine the call

The most critical piece of the recruitment process is the call inviting collaborators to join the project. The **copy requires a fine balance of information** – too much can disengage (or flat out bore) the user, while too little could leave them hesitant to participate. The key to writing a good call is to be **clear about what you are looking for** – this is where the job description prepared earlier comes in handy!

While there are many details that you could include, be judicious about what people need to know up front. Generally, this will be the information that most directly affects their ability to participate, i.e. **what you want them to do, and when you want them to do it by**. The **deadline for receiving applications** is also an important one. Make sure to include this either at the start or the end of the call, so potential contributors know the latest date to get in touch.

Ideally, the language you use should also **get the reader excited** about the project, and build up a desire for them to take part. You can **play up the community aspect** of the project, and let readers know that in participating, they would join a team of scholars working to build a valuable resource. You could also include a list of other contributors on the project, or the institutions that they are from, to motivate others to join the team. If your project has a **specific mission or unique aspects**, be sure to mention these as well.

Remember to tell the reader *why* they ought to join this project! **What's in it for them?** They might be motivated by the 'good deed' aspect, but readers will also be skimming through the call to see what other benefits they might receive out of working on your project. This could include a byline as an author/editor, other credit in the book, or money. If you have funds available, list any **financial compensation** available for the role.

We also recommend writing a few sentences **encouraging people from traditionally underrepresented groups to apply.** A nod in this direction can help encourage people to apply, and even if you already have a diverse team assembled, more input from people with different experiences can only make the project stronger.

Overall, the **structure of the call** is similar to that of the job description: introduce yourself, and the project briefly, linking to the project summary for more information. Next, mention the specific position you are looking to fill, any requirements for participation, and add a link to the longer job description. Make sure to list the deadline to submit an application and instructions on how to express interest (respond to the email, post in a public forum, join an activity on an online platform, etc.).

Once you and your team are happy with the details and the language, you can start spreading the word!

Recruiting

Now that you know who and what you need, it's time to tell the world! Here's how to get the word out and bring your new recruits on board.

Share the call widely, and crowdsource efforts

It's important to **get as many eyeballs** on your call as possible! Simple probability says that the more people who see the call, the higher the likelihood of someone responding to it. You and the leadership team should of course share the call yourselves, but also **encourage everyone else on the project** to do the same.

A good place to start when sending out the call is to **crowdsource a list of places** where it could be shared. There are a number of channels where you can share the call, including but not limited to:

- Listservs or mailing lists in your field
- Community listservs or specific mailing lists for traditionally underserved or underrepresented groups
- Your personal and professional networks
- Colleagues and/or OER champions at your institution
- Social media platforms
- Rebus Community newsletter and other mailing lists focused on open education
- Cold calls (not quite a channel, but sometimes worth a shot)

Generally speaking, subject specific mailing-lists and personal networks will help target instructors, faculty, or researchers, and might be best for tasks that require expertise in content like writing, reviewing, beta testing, or adopting. Calls sent on social media or OER in newsletters target a more general group of people, and would be a good channel for activities like formatting, proofreading, or copyediting. Cold calls can be used to target specific people for any activity, but these do require a fair bit of work to find suitable persons to contact, and may not always have the best return on time invested.

Responding to interested contributors

Now that you're getting a flood of responses from interested collaborators (or so we hope!), it's important that you, or the person assigned, **get back to them quickly!** Replying within a day or two is ideal, as it's important not just as a sign of respect to the respondent, but also to capitalise on their interest! Keep in mind that anyone who reaches out is potentially a valuable team member and advocate for the project, even if they don't end up taking on the role you've shared. Also, if people keep asking the same questions, you can take the cue to add more information to the call and/or job description.

If you receive an expression of interest from someone who **doesn't seem right for the position**, be sure to thank them for their interest in your project, and let them know that there may be other roles on the project for which they would be better suited. If they don't meet some of the criteria listed for the position, you can (if needed) lean on this to explain your decision, which is why it's good to have these things in writing in advance.

If you receive an expression of interest from someone who does seem right for the position, but **can't commit to the timeline** or time frame you have set out, again, say thanks first! Let them know that their timelines don't match what you had in mind, but **try to keep them as an option** in case you don't find anyone else. You can suggest continuing the search for the moment, but that you'll reach back if you are unable to recruit someone on your preferred timeline. If you do find an alternate, be sure to update them! And when you do, you should always offer to keep them in the loop for any future tasks and project updates.

Finally, if you don't receive any responses, **don't despair**! Go back to the drawing board and try these:

- See if anything is missing, confusing or unclear in the call or job description
- Ask some colleagues, or existing team members, if they can see anything that might need changing in your copy
- Think about whether the job can be broken into smaller components that are less of a commitment
- Think about timing – if everyone is buried in planning or marking, you might need to wait a while for people to respond
- Revisit your outreach plan, research some other options, and keep sending!

Sometimes it's just a question of keeping at it, making small adjustments, and sending again until you find the right mix.

And now, if you've been keeping track of the combinations, you'll know there's only one left... the magic formula of someone who has responded to your call, is interested in the project, and happy to work within the timeframe outlined. Hooray! Keep reading to see how to onboard this new team member onto your project!

Onboarding a new recruit

First things first, reply to the contributor **confirming that you would like to welcome them aboard the project**! As with all the other responses, don't forget to thank them for their interest and for volunteering their time. Gratitude and enthusiasm go a long way when you're asking for people's time and energy.

Next, **explain the process and send them all the information** you have about the task they will be completing, and let them know that **questions are welcome**. For instance, if you're recruiting a new author for your project, you should explain the writing and editorial process, share the author guide, point to a model chapter, and confirm deadlines for receiving a first draft. Before they begin working on their task in earnest, you should also share any **MOUs, contracts, or agreements** with the contributor to sign (e.g. our example contributor MOU). Let the new recruit(s) know what **tools or channels of communication** you use, so they know how to contact you or other members on the team. At this point, you could also **share any tracking sheets or other resources** that you are using for managing tasks or the project.

At this stage, it's often a good idea to **set up a call** to go over all of this information, rather than relying solely on email. This is a chance to go through the details and answer any outstanding questions they might have about the project or their role specifically.

In the spirit of collaboration, you should also **introduce the new contributor to the rest of your team**, which can also be done on a call, especially if you're bringing on several people at the same time. Connecting team members with each other, not just the admin. team, is critical to building a community of people around your OER and project!

After recruitment

Now that your team is coming together, it's time to get to work! Your next job is to make sure your new team has everything they need to be successful. Read on for a few tips.

Keep contributors involved

While the hard work of the recruitment portion is over, now is the critical time to ensure that team members are **involved and engaged** as they go about their assigned tasks. While there's always a chance that contributors might drop out of the project for various reasons, you want to make sure that they aren't motivated to do so as a result of how the project is being managed or due to a lack of communication with the larger team.

Clearly communicating with each member on your team is key, so make sure you share information that they need to know and are upfront about anything, such as changes in schedule, additional work, delays, etc. Over the course of the project, stay in touch with contributors and **check-in regularly on their tasks**. You should also **send them frequent updates** on the progress being made overall. It's also helpful to **ask for their feedback** on various aspects of the project: their experience could give them added insight or provide a critical perspective that improves how a task is managed or carried out.

For more ideas, take a look at our our **effective collaboration guide.**

Other things to keep in mind

While we've laid out a start-to-finish process here, recruitment is **likely to be ongoing** on your project as you reach and discover various activities where you need more hands on deck. The first time will always be the most work, but from then on, for additional calls, you can reuse a lot of your copy, adjust in response to feedback, reach out through the same channels, leverage your growing team, and your target audience will already know who you are and what you're doing! Besides, it only gets better and easier with practice.

It's also good to know that sometimes you'll end up with **more people** volunteering than anticipated. Take a moment to rethink how many people are needed for the job and whether more people could be beneficial. For example, if you were counting on one author per chapter and you have more interested, they might be interested in collaborating. You can always adjust! No matter what, though, the most important thing is to **keep everyone who reaches out involved** in some way or the other. Even if they're not working on the project directly, anyone interested enough in what you're doing is an asset.

Other times, despite your best efforts, you'll get **fewer people** expressing interest than desired. This is okay – it happens to us all. In these cases, it's a question of quality over quantity, and you can work to make sure you get the most out of those you have. This means making the experience a positive one for them, and being flexible in terms of timelines and workloads to keep things manageable.

Finally, remember that any contributor to the project is a **volunteer** (even if they are financially compensated). They are choosing to give their time and expertise on your project, so do whatever you can to **make it worth their while**, and **recognize their contributions however you can.**

2.5: ROLES & RESPONSIBILITIES

Teams come in many combinations, but all begin with…you! Regardless of whether you are the project leader or volunteer on a small task, your contribution and participation in the project is invaluable.

During our time supporting different kinds of OER projects, we've seen teams take on a number of forms. The list below is our attempt at categorising these roles. It should give you an idea of the types of work required to publish an OER and who may be responsible for completing these tasks.

Keep in mind that the roles and responsibilities outlined may not necessarily always be assigned to one person, and that crossover can happen. It's also not likely that every project will have (or need) teams large enough to account for all these roles, so use this list as a guide to decide what is most applicable to your project's needs. Please also note that this list is not comprehensive – it's very likely that this will grow as we hear from you or other teams! So if you see any positions missing from here, please let us know in the Rebus Community Forum. Keep reading to get a better sense of the kinds of positions you can have on your team, how responsibilities can be distributed, and how these might apply to your own project. Use our Roles and Responsibilities template to guide your identification of gaps, establishing of roles, and assigning of tasks within your team.

Considerations when assigning roles & responsibilities

With a solid project plan, good intentions, clearly articulated responsibilities, and a set of helpful strategies you can form collaborative alliances which will hopefully support your OER projects as needed. Before we introduce some key roles and associated responsibilities, there a few things to consider:

- How will you delineate workload and ensure expectations are clearly communicated?
- What are some initial strategies you would like to use to help build productive working relationships between the members of your team?
- How can you make the roles and expectations for (new) team members clear?
- What methods will you use to communicate effectively?
- How will you address setbacks in the process?
- What methods will you use to keep your team engaged throughout the project?
- Are there any accessibility needs for your team members to effectively collaborate?
- This stage is a good point to reflect back to your project goals and target audience:

  - Will your audience feel seen and respected through the content?
  - Are there current barriers to accessing the content that needs to be addressed?

All team members carry a shared responsibility to:

- Being nice, compassionate, and a good team player
- Promoting the project widely wherever possible
- Supporting fellow team members in their work
- Meeting their commitments, so that it does not fall upon someone else to complete

These basic standards apply to everyone, and everyone in a team is responsible for committing to them, and holding their fellow teammates accountable.

Beyond this, each of the roles we've detailed below offers up something unique and critical to the creation of the open textbook (or OER). Note that the following list is alphabetical, not in any hierarchical order (because you're all important!).

Author(s)

Authors are generally subject matter experts who have deep knowledge of the field and are responsible for writing or creating the content in your OER. Duties, such as creating chapter proposals, writing chapter outlines, ensuring that the chapter fits within the larger text, offering insight into the student perspective based on teaching experience, etc.. They might also have other duties, including:

- Coordinating with editors and project manager
- Reading through and following the author guide, chapter template etc
- Writing with best practices around accessibility and inclusive design in mind
- Preparing a sensible chapter structure with intentional pedagogical elements to support student success, working in tandem with instructional designers or lead editors
- Creating model chapters
- Writing content (generally more than other authors, often most of the book)
- Attending author calls and answering questions from other authors
- Making chapter glossaries, bibliographies, or other materials
- Researching, creating, or remixing non-textual pieces, such as videos, images, etc.
- Including relevant media in each chapter and checking the web accessibility of these materials, licensing permissions
- Creating ancillary materials, or templates others can follow

- Coordinating with the lead editor and project manager

Contributor(s)

Contributors on a project will come in many different shapes, and be asked to complete many varying tasks. This is a bit of a catch-all term for the kinds of jobs that aren't captured in the other roles, but make no mistake – all contributions are valuable! Broadly, their responsibilities include:

- Performing their assigned tasks in line with expectations
- Asking questions if the task and expectations are unclear
- Communicating with other contributors, their assigned coordinator, project manager, and the rest of the team.

Designer

A project may be fortunate enough to have a dedicated designer, and there's no shortage of things they can bring to the table. These include:

- Designing the book cover (and/or resource landing page)
- Creating images, graphics, illustrations, or videos to be included in the OER
- Checking permissions for any media elements used
- Sharing media in final formats and editable files to enable easier remixing
- Designing with accessibility in mind
- Coordinating with the project manager, lead editor, and lead author
- Creating promotional materials (such as email signatures, infographics, visuals for social media, etc.)

Researcher

A project may have a general researcher at hand or a dedicated one for copyright and permissions (for images, media, extensively quoted texts, remixed texts, etc.). Regardless of the type of researcher you have on your team, their responsibilities broadly include:

- Getting clear instructions on what the project needs and locating them (this could be images, videos, public domain texts, examples, etc.)
- Checking permissions and copyright, and obtaining permissions where necessary (note: we discourage relying too heavily on one-off permissions, so as to avoid complications for downstream users adapting your text)

- Creating a clear and accurate list of permissions, licenses, and attributions in the final text
- Coordinating with the project manager

Advisor

An advisor is someone not directly involved in producing the OER, but who is involved at a high level and offers advice or input as needed. Their responsibilities might include:

- Providing input on the project's definition and direction, and shaping content at a high level
- Setting broad strategic objectives for the resource
- Making sure that these goals are met
- Ensuring the team includes diverse perspectives, which are also represented in the content created
- Mediating conflict if/as it arises
- Acting as an impartial body and advising the admin team on decisions
- Helping find and recruit volunteers
- Attending meetings or calls with the project managers, leads, or broader team
- Promoting the project from conception to publication
- Coordinating with the project manager

Champion

This is an unofficial role, but an important one! Champions are the project's biggest cheerleader, both for the internal team and for the external public. They can help with:

- Keeping the team motivated
- Promoting the project
- Providing quotes, snippets, and updates about the project for marketing/promotional materials
- Acting as an audience test-case and asking for clarification on anything that isn't clear
- Helping polish any communications about the project
- Acting as the public face of project, along with the project manager
- Providing input on the project broadly, similar to an advisor
- Helping recruit collaborators to the project and sharing any calls within their network
- Helping find adopters for the final resource
- Being enthusiastic about the project and the team! It goes a long way to making the experience enjoyable for everyone

Coordinator(s)

Similar to the contributor role, there may be different kinds of tasks that emerge that don't fit under any of the headings in this list, but someone still needs to be responsible for them. Enter the coordinator! The coordinator may support the organization and implementation of processes like peer review, accessibility review, classroom review, author calls, etc.

Some projects will benefit from having a review coordinator overseeing and organizing the peer review process. All projects should ideally have an accessibility coordinator overseeing whether the resource meets best practices for accessibility. Note that this position can be taken by any other member on the team, such as a lead editor or project manager, and they don't necessarily need a lot of expertise themselves – just a willingness to facilitate the accessibility work that needs to be done throughout the creation process.

The coordinator may be tasked with:

- Coordinating and communicating with the project manager, lead editor, and lead author to build best practices into working documents, chapter templates, and ultimately, the final content
- Liaising and coordinating with contributors, editors, and reviewers
- Clarifying expectations regarding contributions and producing supporting documentation to define tasks at hand
- Ensuring any tasks are completed on the agreed timeline
- Providing contributors with access to documents such as review guide, tools, and other preparatory documents such as tracking sheets, calls for reviewers, etc.
- Answering (or finding answers to) questions about accessibility from authors and others on the team as they arise
- Finding and sharing resources on creating accessible content with the team
- Making sure review processes are successfully completed in the discussed timeframe
- Preparing an accessibility and review statement for the final text, surfacing the work done and current standards met or yet unmet

Editor(s)

Editing plays a large role in OER work – it enhances readability, overall quality and relevance of content. We've broken editorial roles and responsibilities into two categories: **substantial editing** and **copy editing.**

Substantive Editors

This editor is a subject matter expert primarily responsible for an initial review of the OER for content accuracy. They help set the vision for the resource, and coordinate with the project manager to outline process and workflows related to content creation. The major duties assigned to substantial editors include:

- Crafting the OER's outline and structure, and soliciting input on both
- Helping shape processes around content (including creating guides and templates)
- Keeping the team focused on broader goals and priorities including diversity, equity, inclusion, accessibility, etc.
- Coordinating with the project manager and other editors
- Liaising with authors and other editors on the team, conducting check-ins, and sending reminders with them
- Editing content within their section and providing input on other sections in the text
- Looking through the text with an expert eye and viewing the resource as a whole throughout the creation process (focusing less on grammar and punctuation and more on cohesion, structure, and working with the content available)
- Providing input on the book's outline, model chapter, chapter templates with an eye to overarching order of content and avoiding duplication of definitions, themes, etc.
- Helping recruit authors for other sections
- Coordinating review on their section (optional)
- Being a cheerleader to authors and other editors
- Stepping-in when needed, to make decisions about content, or to resolve conflict
- Looking at existing resources for comparison
- Making sure that each chapter follows the same structure for easier reading and learning
- Ensuring the text fits together cohesively as whole
- Seeing that text serves its purpose (for a particular course, to fill a void in a field, etc.)
- Identifying areas where content is unclear for authors to revise

Copy Editors and Proofreaders

The copy editor serves a few different purposes on a project, including reading the text from a layman's perspective and making sure the content is clear, concise, and makes sense (as such, the copy editor or proofreader doesn't need to be a subject expert). The copy editor's duties include:

- Reading through the text correcting errors with grammar, punctuation, or sentence structure
- Following and implementing the appropriate style guide for the project

- Ensuring that citations are accurate and consistent
- Checking permissions on media or other non-textual elements

Your project may benefit from having a proofreader to conduct a final read-through of your resource. Proofreaders will check spelling, grammar, and punctuation to fix and find small errors or typos.

Instructional Designer

Instructional designers are instrumental towards ensuring that your resource is an effective learning tool. They review the learning design of the OER and think deeply about the learning experience being created. The instructional designer's tasks are varied, including:

- Working with lead editor or lead author on chapter template and preparatory documents (such as the project summary, outline, model chapter, etc.)
- Confirming learning objectives for resource with the project manager, lead author, and lead editor
- Ensure that these learning objectives are served by the content
- Supporting authors, editors, formatters during content creation and responding to questions as they arise
- Making sure text fits needs of learners in the target course(s)

Project Manager

If you've read any of our other resources, you'll see the words project manager cropping up over and over. As the name suggests, this person is responsible for managing the project – that is, running the process of creating a resource from the beginning, all the way to release (in the traditional publishing world, the managing editor would be a good equivalent for this role). It's a big job, but can be shared, and is critical to a project's success. Duties include:

- Keeping track of everything on the project to ensure that the resource is on its way to completion
- Keeping everyone on track with their tasks, including sharing supporting documents, answering questions and sending reminders
- Managing project-related documents and tools
- Managing the public listing on the Rebus Community forum
- Coordinating team calls
- Coordinating recruitment and calls for contributors
- Managing team communication and keeping the whole team up-to-date as things progress

- Creating and managing timelines and schedules
- Identifying gaps or problems in the process, and ensuring these get resolved
- Being the first point of contact for the project
- Creating a welcoming, supportive environment for all members of the team

Ultimately, the project manager is what we like to refer to as the all-seeing eye on the project, who knows what is happening, when it's happening and who's doing it. This kind of coordination is so important to keep the project on track and make sure that everyone has what they need to be contributing. Project managers are of course not alone in handling these, and others in the team have a big part to play, too. Overall, those running a project are responsible for making sure everyone involved (including themselves) is supported throughout the process and recognised for their time and commitment.

Reviewer(s)

A reviewer provides critical input and suggestion on the resource, either as a whole or at a chapter or section-level. They offer both positive and constructive feedback to help you determine whether your OER is set up to fulfill the goals you outlined in your project summary. Our Review and Feedback section delineates the three different types of reviews we recommend all OER projects conduct: accessibility review, classroom review, and peer review. Below are the reviewing duties that each type of review includes:

Accessibility Reviewer

The accessibility reviewer provides critical feedback on whether the resource, either as a whole or at a chapter or section-level, meets accessibility standards. The reviewer's duties include:

- Conducting an accessibility review on final file formats
- Making recommendations for further improvements
- Preparing, or contributing to, an accessibility statement
- Coordinating with the lead author, lead editor, and project manager

Classroom Reviewer

A classroom reviewer is either an instructor or a student using a resource in their classroom, typically before the 'official' release of a text, and providing critical feedback, either on the text as a whole or at a chapter or section-level. The classroom reviewers's duties include:

- Piloting the OER in a classroom setting

- Reading the classroom review guide thoroughly and making sure they understand it
- Providing feedback in line with rubric or other guidelines (contained in a classroom review guide)
- Providing feedback in agreed format and within set timeframes
- Communicating with the review coordinator or project manager
- Communicating with authors/editors
- Promoting the book, if they are satisfied with the quality of the resource and see value in it
- (Hopefully!) Adopting the book, if as an instructor they would like to use the book for future courses

Peer Reviewer

The peer reviewer is a subject expert who provides critical feedback on the resource, either as a whole or in part. The peer reviewer's duties include:

- Reading review guide thoroughly and making sure they understand it
- Providing feedback in line with review rubric & project specific questions (contained in the review guide)
- Providing feedback in agreed format and within set timeframes
- Communicating with the review coordinator
- Communicating with authors/editors (if not part of an anonymous review)
- Promoting the book, if they are satisfied with the quality of the resource and see value in it
- Adopting the book, if they would like to do so

Technical Lead

Since OER are digital-first resources, having someone on your team to support the software/technology where your resource will be hosted is critical. The technical lead's work on an open textbook project will vary greatly depending on your choice of book formatting software (note: we strongly encourage using tools that provide both a web version and offline formats, including editable formats). This role's tasks broadly include:

- Reviewing potential tools that could be used by team
- Supporting the team with selected tools (set up, training, troubleshooting, etc.)
- Coordinating with the lead author, lead editor, and project manager
- Collecting "finished" content (generally finished means reviewed, edited and proofread)
- Formatting content in OER publishing platforms such as Pressbooks
- Standardizing formatting across chapters (headings, text boxes, learning outcomes, images, tables, etc.)
- Conducting a simple pass over content for accessibility, both when formatting content and also in the resource's final file formats

- Entering OER metadata
- Exporting the OER in various file formats and conducting a visual check

2.6: CONTRIBUTOR MOU TEMPLATE

This template may be used as you're expanding your team and bringing new contributors onto your project. Find an editable version here.

Memorandum of Understanding [Project Title]

[*Project Name*] is a collaborative project, aimed at creating a quality open textbook/open resource for [*audience*]. [*Optional: add a few more sentences about the project and its mission].*

This memorandum of understanding (MOU) lays out the contributor expectations, licensing information, and other conditions of participation. All members of the team are asked to read through and agree to the terms. Any questions or concerns can be addressed to the project manager: [*Project Manager name + contact details*].

1. Role expectations

In this section, write out any expectations for specific kinds of contributors, e.g. authors, reviewers, lead editors, etc.

2. Licensing

All content (writing, images, charts, videos, etc.) created for inclusion in this textbook, as well as ancillary materials (slide decks, assignments, in-class exercises etc. **with the exception of question banks**), are to be licensed under a Creative Commons Attribution 4.0 International License (CC BY 4.0). In accordance, all authors and other creators retain the copyright to their contributions, and by signing below, grant a CC-BY 4.0 license to all content created for this project.

3. Edits, updates, and revisions

All team members understand and accept that the content they produce in the context of this project may be edited, updated, reviewed, and otherwise altered over the course of the publishing process. Authors/ creators will have the opportunity to address significant recommended changes or additions following peer review and/or developmental editing, and retain the right to remove their name from the published version at any time.

4. Team participation

All participants are expected to be engaged, respectful team members. This includes:

- Participating in project discussions, decision making processes, team calls/webinars, and other activities as requested
- Ensuring you meet agreed all upon deadlines, or offer as much notice as possible if you require an extension. If, for any reason, you need to pull out of the project, this should also be indicated to the admin team promptly
- Participating in promotional activities and actively leveraging your own network wherever possible to attract contributors and adopters
- Treating all members of the team with respect, in words and actions
- Engaging with and furthering the project goals

5. Recognition for contributors

This section should state what recognition is offered to contributors, e.g.: "All contributors will be named in the acknowledgements section of the final publication unless they request to be removed. This attribution will include their name and institutional affiliation, and link to a profile or other professional site of their choosing."

6. Termination

The project admin team reserves the right to terminate participation in the project at any time if a contributor is:

- Not fulfilling their agreed upon obligations in a timely manner
- Failing to treat other members of the team with respect
- Otherwise disrupting or negatively impacting the success of the project and team

If a team member is asked to leave the project, any submitted work may be retained and completed/expanded by another contributor in accordance with the conditions of the CC-BY 4.0 license. In this instance, the original creator will still be credited in the final text unless they request to have their name removed.

7. Contributor agreement

I, __________________, agree to the terms of participation stated above.

Signed: ____ Date: ___________________

2.7: EFFECTIVE COLLABORATION

Creating OER is no small feat, and usually involves concerted efforts of many individuals who have a shared vision and goal. Collaboration is at the heart of open work and has allowed the Open Education community to flourish in numerous ways. In the OER projects that Rebus has supported, engagement and collaboration have been key factors in determining the project's advancement or success. Most projects saw some initial interest, buzz, and activity during the first few weeks. However, we noticed that this can die down fairly quickly, and in some cases, where a project has stretched out for too long, we've lost a few contributors along the way. It falls on the project leads to make a conscious effort to keep the team engaged.

Our most successful projects have had an active community of participants – authors, editors, proofreaders, copy editors, reviewers, formatters, leads, other volunteers – who conversed with each other often with updates about their tasks or the project more generally. These projects found a way to ensure participants knew the work they were doing was valuable and part of a larger effort. They also enabled contributors to connect with a larger community of practice in their subject. We found that public-facing projects with a lot of activity acted as social proof for current and potential collaborators: encouraging new people to get involved with the project, and fuelling those already on board to complete the tasks that they had signed up to do.

While engagement helped drive projects forward, for some participants, it was the connections they made with others, and the conversations/discussions they had that they valued more than the final product. Contact between authors, editors, advisors, etc. create a sense of community, even mentorship, among participants. Ultimately, teams are made up of people, and if you focus on the humanity at the core of our teams, this will lead to deeper engagement across your group and more fulfillment in your work. The project managers for the Media Innovation and Entrepreneurship open textbook formed a community of practice and held fortnightly calls with those adopting or teaching with the book. One of their authors notes:

> "Many thanks…for the gift to join you in such a fascinating intellectual and collaborative journey for making the Open Textbook on Media Innovation & Entrepreneurship a dynamic learning, writing, and mentoring experiment. Along with the open textbook and the upcoming instructors' manual, I think you are also helping to create a very dynamic network and community of practice."
>
> —Betty Tsakarestou, author and assistant professor at Panteion University

Considerations for effective collaboration

To help you on your OER journey, we've put together suggestions for effective collaboration so that the team around your OER project remains engaged and committed to seeing the resource all the way through to publication. Apply these tips to ensure the experience is an enjoyable and memorable one for everyone! Remember that there is no clear cut formula or strategy that works for everyone — so take some time as you read to think, experiment, and rely on your team and collective to share some ideas to find what works best for you and your team!

Introduce your team to one another

This sounds very straightforward, but make sure to introduce members of the team to one another, regardless of whether their roles intersect or have too much in common. It's not uncommon to be juggling several lines of communication between yourself as the team lead and many participants, but creating connections across the project is just as important for keeping people engaged. If you're located in the same city, you could try to arrange an in-person meet. However, most projects tend to involve participants from all around the world – so a simple email or video call to introduce the team to one another will go a long way!

If you're not the project lead, but an editor of a particular part or section of the book, you could send a similar email to the authors in your part. The email should welcome individuals to the team, and could even include links to shared resources such as the project's timeline.

Doing so can remind team members that they are part of something bigger!

Communicate and make plans with your team

If you're the project lead, it's especially important to keep in mind that members of your team may not have the same working or communication style. These kinds of things vary across people and cultures, and if you have a global team, you can't expect everyone to switch to your default. Instead, you should discuss preferences and expectations at the start of the project, and invite members to help plan the project timeline and tasks with you. This may help to avoid conflict or disengagement down the line, and help you better gauge when an issue might be arising.

You should also discuss communication preferences with team members early on – is email okay, or are calls better? What kind of response time is expected? Respect these preferences, and as project lead, ask your team to do the same. Sharing this information up front, to whatever extent possible, will help your team understand one another, leading towards smoother interactions and fewer frustrations.

Share models and examples

Make sure everyone has model chapters/outlines/abstracts or whatever else they're being asked to submit. This can ease the cognitive load of getting started, and help ensure consistency in what's submitted. Where possible, it's also good to select this model content from what has already been submitted or created by a project lead and share it with the others – this also adds the little nudge that others are further ahead, which can help get people moving!

In addition to modelling expectations through documents, we also encourage you to do so in your behaviours and engagement with the team. Participate in team conversations fully, communicate clearly, and treat your fellow team members with respect (this is especially critical if you are a project manager or other lead on the team). You set the stage for your fellow teammates, so model what you'd like to see on your team!

Encourage sharing drafts/posting questions in a shared and central communication space

Wherever possible, we ask contributors to share their drafts or ask any questions that they have on a public-facing channel, such as the Rebus Community forum or in Google Docs shared with other authors. If you find the same questions or concerns are coming up from multiple people, consider putting together an FAQ to share with other contributors. You can give contributors editing privileges, and encourage them to add to the list, so the burden of updating the list doesn't fall solely on you. Also consider whether any of these questions could be addressed in your author/editor/contributor guide or project summary and add to them as needed. This helps other members of the team keep track of various tasks, reduces the work of having to answer the same questions many times over, gives people examples to work from, and acts as a subtle reminder to those who may be behind on their deadlines.

Keep in regular communication with your team

Communication is the key to a successful project – remember that teams are made up of people!

You may want to hold a call with your contributors, or an office hours-style drop in session. Encouraging attendance at these can also help develop the community feeling, which helps keep people invested and responsible to each other to fulfill their commitments. These calls may be structured around each chapter, connecting authors and instructors giving feedback for example, or each phase of the project ("Two weeks until submission deadline! Help!") or be an open space for feedback and questions as needed.

If general reminder emails aren't getting much of a response, try individual emails or one-on-one calls with the team leads. If a particular contributor has dropped off the radar, or you're not sure they're seeing the emails you're sending to the whole team, check in with them personally to see how they're getting on. A short note can do the trick, and it may just be that they're having a busy couple of weeks, but the response rate is generally higher with this approach!

Dissuade the drop-outs: instead, encourage participation in less time-consuming tasks…

If at any point it looks like someone might be backing out, suggest that they could instead take on a different role, perhaps acting as a reviewer instead of an author, or help to promote the book down the line. And always ask if they want to stay up to date as things progress! You can contact them again when you're looking for other kinds of contributions or releasing the book. Sharing updates or notifications when the book is available is a good way to acknowledge their interest in the project, even if they haven't been able to commit to it entirely. Continue reading to learn about navigating and addressing any challenges that may crop up in the production process.

…but remember that not everyone will stay involved, and that's okay!

Contributors always have the option to say no and withdraw if they're not able to participate in a project. If they're interested enough to have signed up in the first place, it's worth trying to keep them in the loop, but they might not always want that. It can be disappointing, but if someone does have to bow out completely, remember that we all have competing priorities, and you never know what may be happening on their end. Be respectful of that, and wish them well. There will be plenty more people out there with the time to give to your project to whom you can shift your focus.

Navigating and addressing challenges

No project is perfect, and things are sometimes bound to go differently than anticipated. If this happens, don't worry – it's normal. Things aren't always super smooth on every project. Small things are bound to crop up. As team members, you need to be responsive and able to adapt to situations. Remember, good teams require nurturing, attention, and problem-solving!

When these tough situations do arise, here are some strategies you might look to:

- As project manager, you are responsible for the team overall, and should stand-up against anyone disobeying the team's ground rules. If a problem emerges with a volunteer, try to set up some time to meet them and **talk through the issue face-to-face**, instead of over text or email. Your first goal should be to attain clarity over the situation, and not to make a decision or pass judgment. If a volunteer is acting in a crass or rude manner to you or anyone else on the project, it's within your rights to ask them to leave the project. You can do so politely, but stand your ground and protect your fellow collaborators. Again, look for backup from others on your team if you need it.
- Depending on the nature of the issue, it might help to go back to your preparatory documents, such as the project summary, outline, MOU, etc. Consider these documents as evidence of your project work, and sift through them for clarity and reassurance. They also provide confirmation if there is disagreement on something that was set out early on.
- If an issue related to content crops up, for instance if an author wants to back out of the project during the editing/review phase, or if an author doesn't want to make important changes requested by a reviewer or editor, look back to your MOU and confirm the license on content submitted. More often than not, if the content was licensed CC BY, it can be salvaged in some way to be useful for the project if you decide that's best. However, depending on the situation, it might not be good form to include contested content even if you have the legal right to do so. Use your judgement, and defer to the content creator.
- It's good to acknowledge that in some situations, you might be the person who messed up. In this case, be up front about where things went wrong, and take responsibility for your actions. Then, do what you can to look for solutions and to fix the error. Don't be afraid to ask for help, from your team and from the community at large!
- Lastly, look to the community not only for help in situations, but also for advice and counsel. Talk to other project managers, find out their experiences, learn from their successes and failures, and share your own stories. Remember that even if you're the only manager on your project, you're not alone in the community!

Fig 2.1: A table of common challenges on an OER project and suggestions on how to address them.

Challenge	Suggestion
Not showing up to meetings	Check in with them – is something technical or otherwise preventing them from attending?
Boundary setting (hesitating to pick up tasks)	• Check in with them • If needed, you can assign tasks

Challenge	Suggestion
Trouble prioritizing work	Rely on your documents & spreadsheets
Deliverables and timing	• Send reminders • Other team members can encourage accountability • Plan B – cushion room • Inform of contingencies
Confusion with tools	• Point them to info sheet or documentation • Set up a call to troubleshoot • Connect them with tech support
Unclear expectations of the role or assigned work	• Schedule time to go through role/tasks with them, offer clarifications • Describe your role (be transparent, open) so they know what to expect

Modeling being a good team member

Being intentional and genuine in your role as project manager will set an example for your team and establish a relationship of trust with them. It's also good for you to model the engagement you want to see – in meetings and other spaces. If you are helping create a resource that will be accessible, inclusive, and culturally relevant, it's important that these values show up in your practice with your team – so that they can embody this into what they are creating! A few simple suggestions for ways to start this:

- Learn how to pronounce team members' names
- Start with a territorial acknowledgment
- Turn on captioning services during meetings
- Take into account communication preferences
- Accommodate team accessibility needs
- Assume the best in people, as OER projects are in production for a long period and you never know the full context of a team member's life or challenges outside the project

We also encourage you to reflect on other ways in which you can demonstrate your commitment to equity with your team. These are a start, and we hope you can see the value in structuring and leading an equitable publishing process rooted in community and care!

Self-care

No matter your role in the project, be sure to take care of yourself! OER projects should never come at the cost of you or anyone else on your team. We wanted to end this section with a short reminder to make sure you're managing your own time and well-being carefully too. Saying this explicitly at the get-go of your project may help you practice more self-care throughout! Be mindful of Finally, your language and communication also counts as you support other team members to take care of themselves or grant them the grace they need if they have to pause or step away from the project for a period of time.

Managing a team is hard work, and you might get used to putting yourself in the backseat and keeping the project or volunteers at the forefront. While the project and other volunteers are important, you are too!

Be nice to yourself along the way, and remember that you are also volunteering your energy on the project. Whatever role you may occupy within your team, be it paid or volunteer, respect your own physical and mental boundaries. Take breaks when you need them and understand that communication is essential – not to share delicate details, but to let others know when challenges interfere with your project work.

PART 3: STORYTELLING & COMMUNICATIONS

Part 3 includes:

- Storytelling & Communications Summary
- Storytelling & Communications Overview
    - Importance of storytelling
    - Guiding communications principles
    - Storytelling & communications in your OER
    - Storywork for equitable OER
- Storytelling & Communications Template

3.1: STORYTELLING & COMMUNICATIONS SUMMARY

Well before content is written, even before a project officially 'starts', the story of your OER has begun. How you discuss and describe your work – internally and externally – is important as it informs the decisions you make in your OER. In what follows, we share the **whys** of storytelling and the guiding communications principles of open publishing.

Underlying principles

Storytelling starts at day one, or better yet, day zero. We think the story of an OER begins right from the initial idea -including the reasons for creating it, the subject it covers, your team approach, and people who make up that team. Get in the mindset of telling that story early and often.

Every open resource project is different: so is the story. Our suggestions are a guideline, not a standard. Formulate your own suggestions, based on what happens in your project, and share them with the larger community in the forum!

Collaboration in storytelling and communications is as important as it is in content creation. The more voices and perspectives that are brought in, the greater the diversity, which also leads to greater potential for adoption, use, and re-use.

Connection-making is at the heart of communications. Create and tell a story about your project, connect with those who listen, and respond to their feedback.

Who's Involved?

Storytelling and communications can be done by anyone on the team, but not everyone thinks of themselves as a "marketing person." That is why it's best to provide a clear outline of the promotional plan, along with the resources your team members will need to communicate with a consistent message. Some of the roles are:

- Project leaders: who create the plan and decide on the strategies to deploy
- Communications lead: who assembles the promotional material, writes a project summary, composes tweets and other blurbs
- Contributors: who can provide (or solicit) reviewer blurbs, endorsements, and recommendations for communications channels

Key Tactics

Word of mouth and grassroots efforts are easily the most effective tactics for communicating the story of your OER. The team working on your resource is one community, but you and everyone else in it has ties to many other communities and can help get the word out! To that end:

- Reflect on the content of your OER (approach, vision for the discipline, knowledge, research, text, media, contributors, students, pedagogy)
- Acknowledge and validate different types of knowledge, expertise, and ways of seeing and being in the world to connect with relevant, current discourse
- Use storytelling to describe your project (purpose, vision, people)
- Identify avenues, opportunities, and stages to market your OER at every phase of the production process
- Showcase the team members behind the work – make it personal!
- Share aspects of inclusivity, accessibility, and diversity in your concept, content, and design

Like all the processes in publishing openly, storytelling and communications may happen in iteratively, and/or in unexpected ways. Build trust and deepen your understanding of motivators within the team by making everyone a part of it, and **nurture their involvement** as ambassadors for the OER. If you all think about storytelling as a meaningful tool to help you **communicate the people, purpose, and vision of your work**, this will allow it to find its market – those readers, adopters, and adapters who need it.

3.2: STORYTELLING & COMMUNICATIONS OVERVIEW

This chapter is an integral part of Rebus' collaborative open publishing approach, and also a key juncture for you and your teams to think about creating inclusive and equitable OER. It is designed to help you think through the process of getting your resource in front of the people who want it, whether for adoption or adaptation, reading or research. It is about using the tools and strategies of storytelling and communications to reach those users, but also about the ways in which publicity, promotion, messaging, and outreach tend to differ when the "product" is an OER. Like everything related to publishing OER, these processes often happen on variable schedules, and collaboration is always key to make them successful. In many ways, the storytelling and communications of Rebus-supported projects start right at the conception of the work, running through to release as well as far beyond! Thinking deeply about the story you want to tell as content creators and team support members, may sound like a lot of effort, but we know from experience with past cohorts how well those efforts play out in the longer term. We strongly believe that you should do what you can with what you have throughout the course of the project.

In what follows, we take you through what you need to know when telling your project's story and helping it find its audiences. Read through the sections below, and consider our perspectives as suggestions that you can adapt to suit your own unique needs. Building storytelling and communications into different stages in the publishing process is incredibly useful because you're going about creating your OER with a bit more thought – deliberately and carefully looking at ways to really make sure the end resource is as useful as it can be. So as you start scoping out your project, and at every other phase along the way, keep storytelling and communications in mind. If they run in parallel to the writing, editing, and production phases of creating your resource, everything should go more smoothly when it comes to the big release. Note, there is an element of marketing involved in publishing new content and sharing it with the world, and we'll talk more about this type of communication and promotion later on in the guide, as you 'release and market' your OER.

Remember that this part of the *Guide*, like the others, is a summary of what we have learned in working with you. What makes your OER project unique, however, also makes it distinctive when it comes to marketing. That means that queries will arise and clarifications will be needed, and we eagerly welcome them! Post your responses to this material in the Rebus Community forum, including questions and concerns that have come up for you. This document will continue to evolve, based on our experience managing OER projects and your feedback.

Special thanks to Elizabeth Mays, (former) marketing manager for Rebus; former director of sales and

marketing for Pressbooks and adjunct faculty at Arizona State University; and author and editor of two open textbooks (*Media Innovation and Entrepreneurship* and *A Guide to Making Open Textbooks With Students*) for contributing to this overview!

Importance of storytelling

Before diving into tips and suggestions, we want to explain our philosophy, approach, and the importance of storytelling. Late Ojibwe (Wabaseemoong First Nation) author, Richard Wagamese, explains how narrative shapes our world:

> "All that we are is story. From the moment we are born to the time we continue on our spirit journey, we are involved in the creation of the story of our time here. It is what we arrive with. It is all we leave behind. We are not the things we accumulate. We are not the things we deem important. We are story. All of us. What comes to matter then is the creation of the best possible story we can while we're here; you, me, us, together. When we can do that and we take the time to share those stories with each other, we get bigger inside, we see each other, we recognize our kinship – we change the world, one story at a time."

As you're seeing here, storytelling comes into play as an important aspect of creating or adapting OER. Our approach to storytelling is to **start communicating right at the beginning of the project**, always with the goal of reaching potential adopters. Starting this early means you have a head start once your resource is released, so marketing should be as much a part of the creation process as project scoping and building your team. If you limit your marketing and communications efforts to the time immediately surrounding the release and launch, you may not be as successful in gathering the widest group of readers and adopters around your OER.

Storytelling is a meaningful tool to help you communicate the people, purpose, and vision of your work. We subscribe to the idea that **stories are a series of connections**. In most cases, these connections are between people and projects, where Rebus' target audiences are collaborators and communities. Storytelling can enable your team to communicate more effectively the motivations and the drivers for doing this work to one another, and this can translate into the OER being created.

Guiding communications principles

Our goal with OER projects has always been to create a valuable resource for others to use, and to build a vibrant community around it. Over time, we have landed on a set of principles that are at the core of our overall approach, shared below.

For us, **storytelling & communications starts at day one, or better yet, day zero.** We see communications as a way of **creating and telling a story** about your project and the resource you (and others) are working to build. The story includes not only the reasons for creating the resource, but also the people who you hope will read, adopt, and adapt it. That means thinking about how your team is formed, who those people are, and what they bring to the project. Simultaneously, as you scope out the chapters and sections and subsections, bring in the story of what the book will include – and what it won't (and why). **Making your work, and your story, public** is part of the philosophy that underlies open – transparency is a best practice. Keep the communications flowing. Document your decisions and share them with the team, so that they become not just part of the story, but the storytellers themselves. **Get the word out early and often**, about what you're doing and why, as well as who is helping you do it. It can be through word of mouth, social media, association listservs, a blog site, or other channels (we'll dive in to this in more detail later).

Describing the story of your project helps inform the narrative of your OER and prioritize your work. Every stage of the OER publishing process can be leveraged to help the book reach its potential adopters, and there are ways to ensure that **communication is smoothly built into what you do.** For instance, collaborative authorship creates opportunities for buy-in and allows for a native network of ambassadors for the book to form. Project updates (through the channels noted above) keep the creation process on the radar of your colleagues and community, including those who aren't directly involved or interested (yet!) The classroom and peer-review phases not only provide invaluable feedback on the book's content, they also help establish groups of future users and readers around the book. Think of these people as **a community of interest and practice** that naturally forms (and belongs) around the book. In fact, an underlying goal for every stage of OER development should be community building and engagement. As long as you are **open about your processes** and communicate them directly, you can always **consider storytelling and communications as part of any phase of publishing.**

In our experience so far, providing "value" to a community of potential users or collaborators is one way to help make a book meaningful and visible to them. For instance, one easy way to create value is to turn parts of the OER's story into usable, engaging, and even teachable chunks. You could do this by **providing content updates** as your team members write and edit their chapters. You can also **share success stories** of things that go well in the process, which not only communicates how open publishing works, but also gives others the incentive to try it out themselves.

When sharing your stories, try to **showcase the team members** behind the work. People like to hear about the personal aspects of publishing, not just the facts and figures. Putting a human face or voice to the project helps make it more compelling, and more relatable for those who aren't involved. Besides, the people who are mentioned will naturally help promote those stories themselves! One way to showcase individual voices is by soliciting and sharing quotes from the team. Ask people both from within and outside the project leadership to talk about their experiences. Beyond the insights you gather on what works (or doesn't) about a given chapter or section, it keeps the process open and adds energy to the community around the book. At the end of the day, the project is made up of you and the team involved, so don't hide behind the scenes!

Another approach to telling the story of your project is to share how your handling or presentation of a particular subject or topic **makes your resource unique.** This might be in the tone of the text, the pedagogical approach, what areas you choose to cover (or not cover!), etc. Another great way in which your text might be unique is that it demonstrates **greater inclusivity** and a wider variety of perspectives and participation, both in the content itself and the teams creating the content. One of the most important principles of publishing openly is that it creates opportunities for more inclusive approaches to content creation, so if you commit to and enact these principles in your project, be clear about the choices you're making and why you're making them. Keep up the messaging about your work as related to accessibility, diversity, and equity, from the project scoping phase through content creation, peer review, and release.

As your project rolls along and you reach different milestones, keep asking yourself whether you've remembered to spread the word lately. With communicating the story of your OER, it's important to **maintain momentum as you are building interest.** While your major goal is to complete your book, resource, or ancillary material, the people around you might be focused on other things. So even as you work to build up a community around the project, they need to **keep being engaged with new ideas, updates, and stories. Be honest and visible**, upfront about your decisions, and attentive to the comments and suggestions you receive in response.

Finally, storytelling and communications are **just as much about listening as they are about broadcasting.** Make sure to give your community **accessible pathways to get back to you** and stay on top of those communications channels. Respond quickly and enthusiastically, and it will reinforce that you are listening and care about what they have to say. If you note any eagerness that seems to go beyond standard interest, you might have a potential team member on your hands! Give them individualized attention and the chance to learn more about your project or participate in it. Especially once there is more than the initial team talking about the project, make sure that there are places to **engage people in conversation** and then give them opportunities to do more than just talk (see our engagement guide for more ideas). **Provide avenues to participate** and, as always, be inviting and welcoming!

Storytelling & communications in your OER

When you begin thinking about communications within this framework of storytelling, there's no limit to the types of tactics you can employ. Below is a short list of ways to promote your project, all along the road to release. Some of these are likely familiar, and some might be new, but either way, think about how they can be undertaken within a philosophy of openness and collaboration. Remember to keep providing value, so that these processes always offer a way for someone to get involved and do more. If people have something they can use (e.g.: investigate further, teach about, tweet), it will resonate with them more deeply, and inspire them to become part of the process.

- blog posts (with clear links to more content that is useful to your audience)
- milestone announcements (providing information on what someone can do next, like contribute, review, or adopt)
- social media (either from your accounts or a dedicated project account, sharing updates and other relevant content)
- discoverability (so readers, adopters, and adapters can get their hands on the OER when they want it), meaning:
  - maintaining a public listing for project
  - submitting completed content to repositories
  - ensuring metadata is comprehensive and accurate
- listserv discussions (so you can become an engaged participant in a community, naturally directing people to your resource)
- email signatures (which can keep the project front of mind as you interact with people)
- community calls (to share updates, gather feedback, and reinforce community building)
- conferences (as opportunities to present, be challenged, make connections, and reconsider what you think you "know" about your project and how to make it better in a future release)
- promotional materials (that not only reinforce the value that your resource brings, but do so in quick and friendly formats), including:
  - slide decks
  - blurbs or review quotes
  - pamphlets
- print copies of the book, for potential adopters (to put a physical presence on their desk – front of view, front of mind!)
- project mailing list (for more frequent and detailed updates, and from which you also allow people to opt-out!)

For us, storytelling and communications are mainly ways to connect communities and collaborators with your book. At Rebus, what drives our work is the idea that we're building books to build communities, and building communities to build books. We strongly believe in the power of groups of people to come together around a particular project, and doing so in ways that help everybody benefit.

It's with this goal in mind that we've outlined the principles and strategies above, and we want to remind you to keep tapping into your biggest resource as you go about marketing your book – you and your team's network of contacts! Reach out to these people, whether they are in your professional or personal circles, and remember to listen to their insights about your book.

Positive recommendations about the book from people in the community around it are the most valuable pieces of communications you can 'create.' Word of mouth is immensely powerful in the OER space, so be sure to leverage any endorsements about your book – even traditional publishers will tell you that there's no paid tactic that has the same impact as someone vouching for the quality of your resource. This type of handselling can only happen if you engage with the community right from the very beginning of your project, so that they are as invested in the resource as you are, even if they were not directly involved in the production. Collaborate and create, and you'll see the community grow along the way. For us, that's what open publishing is all about!

Storywork for equitable OER

Storytelling also plays a key role in the creation of your OER. It is important to think about what you want to convey in your resource, and be intentional about this work because of the OER's power to transform education. Open Education provides us with opportunities to implement social justice in unique ways, as you create OER to better support students. We are certain that your work can and will address the status quo/structural issues standing in the way of *accessibility and equity for all*.

In discussing how OER creation can be transformative, we wanted to offer a few specific ways you all can commit to making an equitable OER. These are some simple, but concrete action items that you could incorporate into your practises immediately.

First, we suggest that you don't just turn toward a makeshift solution at the end, but start out with the right priorities that guide you in thinking beyond diversity just as race, but also as worldviews, knowledges, economic privilege, class, gender, sexuality, body size and shape, language, nationalities, abilities, age, employment statues, etc. Make sure your project timelines allow adequate room to make revisions to content with these lenses. Returning back to the Learning Objectives you articulated in project scoping can help you think about the context in which the OER will be used and reimagine the possibilities of the discipline in which the OER will be used.

You can also critically re-evaluate the materials that you are adapting and analyse whether they **include key figures** or **new scholarship**, and help you build your OER in ways that tell the depths of the stories you wish to convey. Telling the full story of your disciplines is a simple but very important way to make your OER more equitable. You could include the full narrative of the context around a key figure, especially if they were perpetuating oppressive systems. Don't isolate figures or shy away from noting the broader story around them.

An example of this is American psychologist Abraham Maslow, most famous for Maslow's hierarchy of needs.

While his theory is taught in a variety of disciplines, context behind it is often excluded. Maslow spent a few weeks at Siksika (Blackfoot Reserve) in Southern Alberta, Canada. Ryan Heavy Head and Narcisse Blood discuss the Blackfoot worldview and its influence on Maslow in their research: *How First Nations Helped Develop a Keystone of Modern Psychology.* Adding context like this throughout your pedagogy not only gives credit to the original source of knowledge, but also provides both you and your learners opportunity to expand your frame of reference.

Lastly, it's also important to be mindful of who gets to communicate and who does not. Remember, we are not trying to gatekeep knowledge. It's important to allow individuals to speak their own stories, so if it is application, you can bring in more people to contribute to your OER. Think of historically excluded voices, industry experts (whose knowledge is often not validated in academia), student voices, and more. You have the opportunity to grant a lot of agency in the OER you are building!

We hope this chapter has shown the importance of taking the time to reflect on your intentions and desired impact of your resource. Thinking deeply about your OER's story and communications plan may sound like a lot of effort, but we know from experience how well those efforts play out in the long term. Building storytelling and communications into your processes is incredibly useful because **you're going about creating your OER with a bit more thought, deliberation, and care as you look at ways to really make sure the end resource is as useful as it can be!**

3.3: STORYTELLING & COMMUNICATIONS TEMPLATE

This template may be used as you're starting to define your project. Find an editable version here.

Storytelling & Communications Template: [Project Title]

Project Members: [Names]

Part 1: Situate yourself within the Project

Use the space below to collect team bios brief bios that speak to any of the following:

1. *personal drivers*
2. *individual skills and expertise*

You can use this information to discuss ways to leverage these skills over the course of the project. This can also become the basis of an "About the Contributors" section in your OER.

Part 2: Storytelling in your OER

Use the space below to take notes of your discussion with the team about the approach(es) to storytelling you want to take with your project. Discuss any of the questions below:

1. *Is there anything particularly unique about your OER? This could be in terms of content covered, pedagogical approach, team composition, or something else!*
2. *What principles, norms, values, and worldviews inform the selection of knowledge in your OER?*
3. *What voices and perspectives will you include?*
4. *How will these stories be told?*
5. *Who are these stories for?*
6. *How will you make sure these stories are heard?*
7. *What will take priority? Why?*

8. *Are there any gaps? Can you look at your networks in your department, institution, local communities, or regions to fill the gaps?*
9. *Can you cast a wider net to welcome more collaborators on board?*

Part 3: Document Marketing Avenues

Use the space below to collect ideas for channels, events, or spaces where you want to share project communications and news over the coming months. You can refer to this list when sharing external communications to solicit help or to announce major milestones.

The textbox offers some ideas for inspiration:

- **Project Homepage** to share progress, updates, and calls for participation (CFP) publicly
- **Email**
    - Email signatures (keep the project front of mind with all email interactions)
    - Existing OER listservs to communication your work: CCCOER, LibOER Digest
    - Discipline specific listservs
- **Blog posts**
    - Personal blog
    - Institution's marketing site
- **Community Calls** to recruit authors, editors, others on the team
- **Conferences** where you can present on specific aspects in your project
- **Social Media**
        - Personal accounts from team members
        - Dedicated project account

Listservs:

Use the Mailing List template to keep track of listservs where you can spread the word.

Conferences/events our team can attend:

Other spaces to publicize the project:

PART 4: CREATING & EDITING CONTENT

Part 4 includes:

- Creating & Editing Content Summary
- Creating & Editing Content Overview
    - Creating Content
    - Editing Content
- Considerations When Creating & Editing Content
- Templates
    - Author Guide (with Style Sheet) Template
    - Content Tracking Template
    - Image Tracking Template
    - OER Structure Template

4.1: CREATING & EDITING CONTENT SUMMARY

Congratulations! You've made it to the meat of the project – creating and editing content. Content in your OER should be consistent with the assessments your team designs, to prepare and support students through the assessment process, regardless of the type or format. This is also an important time to pay attention to considerations such as accessibility, inclusion, tone, reading level, and other structural elements, which together will improve the overall quality of your content.

Whether you're starting a new OER or adapting an existing resource, this summary outlines the different processes of creating and editing content that help make your resource into a whole, cohesive resource that fulfills its intended learning objectives.

Underlying principles

Always keep the audience front of mind. Authors should have a clear understanding of the resource's eventual readers, why it is being created, what needs it fills, and how to keep the content culturally relevant, and accessible to make the resource work better for its readers. Ensure that your authors and editors keep accessibility, reading levels, and format in mind, so that everybody reading the OER can find value in it.

Get support from others. Create pathways for authors to work with and get input from instructional designers, potential adopters, and students, so the finished book is effective and valuable.

Model good practices. Use your author guide and model chapter to show authors how to incorporate accessibility, structure content in modules (for potential adapters), track glossary terms, properly tag key concepts, and enter citations.

Remember that creation can be iterative. Content can be expanded on, revised, and improved over time: the first release doesn't need to include everything. Start with the core concepts, and then add case studies, media, quizzes, assignments, question banks, and slide decks. Editing and revisions will always expand to fill the time allotted to it. At a certain point, you need to stop and be satisfied with your content, rather than trying to make everything 'perfect.'

Who's Involved?

Content creation is all about writing (and editing) for a student audience. We believe that collaborative approach to creating and editing content is key —it means multiple perspectives are embedded throughout the resource, which is ultimately better for readers.

Authoring teams should have multiple people collaborating, such as:

- Subject matter experts (including collaborators from outside your institution!)
- Instructional designers
- Curriculum developers
- Students
- Community members, senior experts, or industry professionals

When it comes to editing, it can take place at many points during the resource's production, with different kinds of editors involved at each stage:

- Substantive editors are ideally subject-matter experts, and do a lot of work related to resolving questions and issues, and addressing areas of improvement (as identified by the developmental editor)
- Copyeditors work at the granular level, closely reading and editing for sentence structure, grammar, syntax, vocabulary, voice, and punctuation. They may also assist with permissions, citations, layout, and design details during the book's formatting

Key Tactics

While creating and editing content is a major part of the authoring process – it's not the only part!

Putting in planning and decision-making time up front is one of the most important things to do. The careful combination and documentation of this process also plays an important role. Transparent documentation and good project management helps your teams understand expectations, keep consistency throughout the resource, and creates a positive experience for everyone involved! .

- Critically reflect on the alignment of your outline, chapter structure, and assessment plan with your project summary (learning objectives, goals, measures of success) to support student learning
- Envision how your OER is part of your classroom toolkit to guide students to success (and what success means to you as educators)
- Act on input from your team members with specific expertise in curriculum development and instructional design to finalise your OER structure, pedagogical devices (sequence of themes, topics covered, activities, prompts, non-textual elements), and assessment plan
- Build a sense of teamwork by connecting your editors with authors, instructional designers, and other collaborators, while encouraging open dialogue among them
- Decide what content that needs to be produced, adapted, remixed, or researched (text, images, videos, interactive elements, case studies, etc.)
- Discuss and delegate ways to split content creation and editing work throughout the team (consider: activities, prompts, sections, non-textual elements, subject-matter edits, copy edits)
- Ensure authors and editors are aware of their roles, deadlines, and project management tools by adapting an author guide and style sheet to track the progress of your OER as it is being written, produced, and edited

Collaborators should get out of the project as much as they put in, so do what you can to reward them, recognize their efforts, and make their experience a good one! This will leave you with a happy and vibrant community around your resource, which will also be reflected in the final product.

4.2: CREATING & EDITING CONTENT OVERVIEW

Creating Content

Whether you're starting a new textbook or adapting an existing resource, content creation is one of the biggest parts of your project, as this is where you put together the bulk of the resource. This section will walk you through the content creation phase, including things to keep in mind while authoring the book, creating ancillary materials (slide decks, question banks, assignments, sidebars, workbooks, etc.), adapting a book, and how you can set up your project to make it an enjoyable and rewarding experience for both the content authors and support team members.

Fig 4.1: An overview of the Rebus publishing process.

In Project Scoping, we explored the whys and hows of scoping out and starting on your open textbook project, including articulating why your project is important to you and your primary goals for the resource. Next, you read about Growing and Managing Teams – from why they're important to various roles & responsibilities, and how to effectively collaborate with teammates.

One of the underlying principles of this part of the publishing process is **keeping the audience front of mind**. Authoring teams should have a clear understanding of the book's audience, why it's being created, what needs it fills, and how to keep the content culturally relevant and accessible. Having spent time thinking about the significant learning outcomes for your OER in the earlier stages will make it easier now to draft an initial outline. It will also help you consider specific elements in your materials such as learning and assessment activities that will support your students in unique and innovative ways.

No single writing approach works for all projects. Instead, it will depend on the content creation team that you have in place and the type of resource you are trying to produce. Read through the sections below, and consider the suggestions as you decide what content that needs to be produced, adapted, remixed, or researched (text, images, videos, interactive elements, case studies, etc.). See our section on considerations when creating & editing content for more details and considerations.

Authoring teams

Before we dive into the nitty-gritty of creating content, let's first take a look at the people behind the work. We believe that a collaborative dynamic means multiple perspectives are embedded in a text, which is ultimately better for readers. Authoring teams should have multiple people collaborating, such as subject matter experts, instructional designers, curriculum developers, etc.. In our experience, an 'ideal' project team isn't homogenous — it doesn't solely consist of subject-matter experts or a group of librarians. Rather, we think that by having people from different roles such as librarians, teachers, students, accessibility practitioners, technologists, etc., the social and informational diversity of your project increases.

A team can develop a clear sense of shared ownership over the project, without the same level of work needed if you were to go it alone, but it takes some effort to keep everyone on the same page. This shared ownership will look different for different teams. For example, if you are the only author on a text, do keep in mind that you will need to rely on peer and classroom review for feedback and different perspectives or expertise, as it's your main chance to get other eyes on the content. In these cases, be sure to give good guidelines to your reviewers so you can get the specific kinds of feedback you need, along with anything else they see fit to highlight.

Collaboration supports you in connecting your OER with intentional pedagogy, so as you have discussions and make decisions with your team, we encourage you to pause and reflect on the difference that you are making in the lives of your students — with the content, with the ways you teach it, and via the teaching and learning experience more broadly. This is where you can be innovative and make your OER stand out as a unique learning tool. Refer back to the roles and responsibilities section to use as a guide to decide what will work best for your team's needs. No two projects will take the same approach or will comprise the same individuals, and as such, the process of creating content will always be very different.

Creation process

Intentional alignment to outcomes

As you begin preparing and planning your content creation, it is important to remember that your audience is students – you're creating (or remixing) this OER to support their learning, growth, and development! So start with an intentional alignment to outcomes. We suggest thinking back to the learning outcomes you articulated during project scoping and intentionally align them with the content of your OER. The process of content creation extends beyond creating the content – it also includes looking at techniques to make meaningful learning experiences for students. A core factor in that process is ensuring that the content and assessments your team uses or designs integrate well with the content you're developing.

Alignment with your overarching goals is equally important when you create the means to measure student growth and progress. That's where the concept of authentic assessment comes in. As it turns out, your OER can include innovative and authentic assessments that provide students with ample opportunities to rehearse, practice, consult resources, and get feedback. An authentic assessment is one that

- is realistic.
- requires judgment and innovation.
- asks the student to "do" the subject.
- replicates or simulates the contexts in which adults are "tested" in the workplace or in civic or personal life.
- assesses the student's ability to efficiently and effectively use a repertoire of knowledge and skills to negotiate a complex task.
- allows appropriate opportunities to rehearse, practice, consult resources, and get feedback on and refine performances and products.[1]

Content creation and assessment are not separate, distinct items to develop. Rather, they inform each other and should be well-integrated to best support educators and students. Have a discussion with your team about how content and assessment can be scaffolded, and then create a plan that works for you. While assessment

1. INDIANA UNIVERSITY BLOOMINGTON. 2019. "Authentic Assessment." Center for Innovative Teaching and Learning. 2019. https://citl.indiana.edu/teaching-resources/assessing-student-learning/authentic-assessment/index.html.

may be a task farther down the road, it's important to be mindful and intentional about your approach even at the start of content creation. To help guide these conversations, we've compiled a few questions to consider. As you you make decisions about content:

- What are the core pieces that you want your students to remember?
- Based on your expertise, what content will serve your students best in the future?
- How can the resource begin to model the critical thinking required for the course assessments?

As you make decisions about assessments:

- How does it enable students to practice the key skills and learn the central content of the unit or course?
- Are there checkpoints for students to make mistakes and recover?
- Does it offer some longer term, transferable skills that students can takeaway?

There is a unique opportunity here to create an integrated, meaningful learning experience for your students while collaborating with other passionate educators. Have a discussion in your team about how content and assessment can be scaffolded, and then create a plan that works for you. While assessment may be a task farther down the road, it's important to be mindful and intentional about your approach even at the start of content creation.

Authoring workflow

Writing good content is easier with good documentation. Transparent documentation and good project management will help your teams move through this stage smoothly. Approaching writing with the right foundation will make not only the writing process easier, but also editing and reviewing down the line. So whatever the makeup of your authoring team, putting in the time to plan your content and make some key decisions up front is the single-most important thing you can do.

As you make these decisions, we encourage you to keep flexibility in mind. All the members of your team who teach may have unique pedagogical styles, and we don't want the structure you offer to smother or stagnate that. Rather, you want to provide flexible guide rails that ensure that students have the best possible learning experience. We recognize that accomplishing that while integrating elements of authentic assessment is no easy feat!

That being said, that's where the power of OER really comes to the surface – you're currently working on the first iteration of your resource. Over time, your resource can grow to become more expansive and comprehensive. So, even as you make these decisions about what to include and how best to do so, know that these are not limiting decisions. In the long run, you are setting up your resource, your team, and the end users of your OER for a great learning experience.

One of the first decisions to make is how your OER will be structured. Elements of textbook structure can support student learning in a meaningful way. By ensuring consistency in how the content is delivered and presented in the text, students can focus on absorbing and applying the information more efficiently. We've created an OER Structure Template to support your teams in planning the structure of your resource. Creating or reviewing an outline with your team can also help to **identify potential areas of overlap** between chapters, or complementary sections, allowing authors to write with an eye to the larger text as they go, which will help reduce the need for substantial editing down the road.

With the outline in hand, you can also **prepare an author guide**. This is another central tool to ensure shared understanding and consistency, and can include a **style guide, chapter template, model chapter**, as well as information about **writing tools, licensing, accessibility, media, non-textual elements, author expectations, submission information**, and **contact details** for the lead author or project manager.

Check out our author guide template for some guidance if you need it – it includes all these elements which you can adapt to fit your project. We've also collected a few examples of author guides used in some of our open textbook projects so you can see the different approaches people have taken: *Introduction to Philosophy*, *History of Science and Technology*, and *Introduction to North American Archaeology*. Overall, the author guide is an important part of making sure the content created is coherent and consistent, even if it's written by a range of people, and to ensure that all these authors have the information they need to do their best work!

As the project manager or content coordinator, you should also put together a **simple tracking sheet** to keep an eye on the status of each piece of content. Having this information collected in one document will save you the time and mental frustration of looking through emails, chats, or other conversations with authors for an update. We've prepared a content tracking template and an image tracking template that you can copy and adapt for your project as needed.

Checking permissions on images, excerpts, and other media in your book is a team effort, and these spreadsheets will make the process much easier. The project manager or section leads can identify open repositories to source these elements, while authors can do an initial check when including external content in their contributions. When it comes to confirming permissions, the editor assigned to a given section can more easily conduct a final check. This type of work is sometimes best done when going through the book line by line, so if your team does not have a member dedicated to rights and permissions, then the copyeditor can take this on, in line with their fact checking duties. Finally, make sure you **share these documents with the authors**, and use this opportunity to **conduct an author call** and **introduce various members of the team** with one another. If your team is spread across different time zones, you could instead share the information on a public discussion forum, email, or using whatever agreed upon methods of communication suit your project. **Relay information** about **deadlines, expectations, and process** with the authors, address any questions that come up, and incorporate any other information authors identify as being useful to them. Then, it's time to let them write!

It's good to give authors the space they need to make content, but at the same time, it can be a solitary process and it's good to make sure that they don't feel isolated from the rest of the team and any other progress being made. **Ongoing collaboration and communication** between authors and the team will help, and it can also provide some gentle nudging to help keep people on track. It's also good to be able to course-correct as you go, rather than only catching issues or confusion later in the process. If possible, **conduct regular check-ins and author calls**, and if authors contact you with any questions over the course of this period, **start building a list of FAQs** to share with the team.

Lastly, once you're **collecting content** that has been drafted or is ready for the next stage, thank the author for their time and **provide clear details regarding the next steps** in the process so they know what happens next. If the author's involvement will be needed down the line (e.g. to implement revisions after editing and peer review), let them know now so this work doesn't come as a surprise later. Now's also your chance to make sure you can keep the author engaged going forward, by providing project updates or more (see our engagement guide for ideas). Authors can become great champions and even adopters for your project in future.

Remixing considerations

If you are remixing resources, the process of writing for a student audience might look a bit different. Rather than starting from your own writing style or tone, you'll be building off of someone else's. You may not be designing the pedagogical devices and chapter structure from scratch. That being said, you can still use these recommendations to guide the revisions you make to your resource. As you do so, consider:

- What could be better, in terms of organization, tone, style, sentence-level clarity, or integrated pedagogical devices?
- In what areas should special attention be paid to inclusivity and cultural relevance? To technical accessibility?
- This is also a prime opportunity to begin localizing content. What examples can you bring in to make the content relevant for your students? How do the challenges or concepts you are covering surface in this particular region?

With all of this in mind, you should be mindful to concentrate your team's energy on the aspects that are most important. Timeblock this work especially if your team is planning on drafting additional content, so you are spending the majority of your time on the most critical pieces.

Editing Content

Creating content without editing is fairly meaningless — as editing is about connecting different portions of the book, refining and polishing the drafts at hand, applying consistency to each section, and helping to ensure the formation of a cohesive resource that meets learning objectives. **Editing can play a role in every project — regardless of whether your project is a large collaboratively authored one in need of editing for consistency, or an remixed adaptation project built on an existing resource.** In what follows, consider our guidelines as you are creating a new open textbook, adapting an existing book, or remixing multiple resources – editing is critical to each of these projects, but might surface in different ways.

Special thanks to Elizabeth Mays for her contributions to this overview – Liz is the former marketing manager for Rebus and former director of sales and marketing for Pressbooks, as well as adjunct faculty member at Arizona State University, and author and editor of two open textbooks (*Media Innovation and Entrepreneurship* and *A Guide to Making Open Textbooks with Students*)!

Purpose

Why does editing matter? While content creation brings the raw materials together, editing gives the resource structure and appeal which can significantly impact how useful it is for learners. This is the ideal opportunity to ensure that larger themes and connections are integrated throughout. We've highlighted a few key benefits on the slide. In addition, it serves as another great opportunity to check for equitable practices and inclusive course materials — acting as a form of review.

It's also important to know that editing is really an umbrella term for a lot of different processes. It can be useful to think of editing in terms of scale, with different editors performing different tasks at the beginning, middle, and end of the project. Editing starts with the big picture, like the subject of the OER and how it is treated, as well as the broader discourse of which the resource will be a part. It then narrows in on mid-range aspects, such as how the chapters are ordered and structured, and what themes will be included or left out. Usually (though not always), the editing that takes place later on gets down to more granular details, including fact-checking and spelling and punctuation. Remembering to keep the different scales of editing in mind throughout the project is good if you're aiming at creating a well-rounded resource. Through this approach, editing ensures that the content fits the purpose, and fulfils the learning objectives that you set out for the resource during project scoping.

Editing is also a valuable way to have many different pairs of eyes on the content throughout various stages of creation, from conception and first drafts through formatting, proofreading, and the final versions before release. Along the way, editors will make everything from substantial to incremental revisions, improving the overall quality, readability, and relevancy. In this manner, editing also functions as a kind of review, where people who are not necessarily subject-matter experts read through and adjust the content. Editing as review is an important aspect of this process, and a useful source of critique, feedback, and suggestions that will ultimately improve the resource.

Types of editing

As mentioned at the start of this section, editing can take place during all phases of the project, as early as project scoping, and as late as final formatting. While there are additional ways to parse out the editing process, we find that what is most useful for OER projects like yours to consider is editing in these two major buckets:

1. structural and substantive revisions to content, and
2. copy editing and proofreading.

Substantive editing

In the first major bucket, we find substantive, content-level editing. This is really editing of the content, conducted by someone with subject-matter expertise. This stage of editing has a heavier lift associated with it, as it may include reorganizing sections, rewriting sentences, and making various other recommendations to the authors. A good way to structure this type of edit is to use your regular meetings or have a scheduled routine for your faculty authors to share drafts with one another. Use this time to ask questions such as: Do drafts fit the model chapter you have all outlined? Is there a critical gap in the discipline that someone notices? Can specific edits be made to improve cultural relevance? You can get your faculty members to switch drafts with one another to check for these pieces. Your role as lead will be to facilitate this exchange and process of resolving questions and problems. Because these changes are more extensive and collaborative, they typically take place wherever the authors are composing, for example MS Word or Google Docs. This type of editing is all about making sure the OER is set up to meet learning objectives, and in so doing, that students are set up to succeed.

Copy editing & proofreading

In the second general bucket, we find more granular revisions made to ensure consistency and polish across the resource: copy editing and proofreading. This involves a very close reading of the text to catch needed corrections to sentence structure, grammar, syntax issues, vocabulary, and punctuation. Editors at this stage may also attend to some level of stylistic concerns to help the book have a consistent tone and voice — this can again be done internally in the team with 'final' drafts or maybe even rely on other support like graduate students interested in being part of the project. Since this edit happens at a later stage when content may be placed in Pressbooks, it may also involve checking permissions on images, media, quotes, excerpts, and other elements, as well as layout consistency and formatting.

Both of these editing stages can benefit from the perspectives of the subject-matter experts on your teams. That being said, you all as librarian leads can bring a lot of insight to this process as well! As librarians, you may be more versed in what common questions or challenges students bring when encountering these subject areas early on in their academic careers. You may be able to identify areas that need increased clarity or readability for students. And, importantly, you're also in a position to push for the team to make changes that center equity concerns we've been talking about throughout the year. As we move on to talk a bit more about the logistics of editing workflows, we hope that we can keep in front of mind the ways in which you are uniquely positioned to support insightful revisions.

Editing workflow

Similar to content creation, successful editing processes require creating and maintaining a clear workflow or process for the team to follow. We've compiled an example workflow below with some suggestions to guide you through the editing process. There is no "one size fits all approach" to editing workflows, so feel free to adapt these suggestions to best meet the needs of your team.

1. Authors send chapters to editors
2. Editor(s) review(s) chapter, leaving comments
3. Authors make changes and then submit for copy editing.
4. Copyeditors review parts.
5. Final round of proofreading, with special attention to formatting and accessibility.

As you can see, we recommend beginning by assigning editors to chapters. It makes the most sense to assign content authors to edit chapters that they are not themselves authoring. Editors can leave comments in Google Docs or whatever authoring tool your team is using. Take advantage of the suggestions mode or track changes options in these tools rather than making too many copies of a chapter, as it can easily get out of hand to manage!

One of the first pieces of editing advice we have to share is this: **time-box this work** – particularly the more substantial editing pieces. **Revisions can become a never ending cycle.** Be intentional with your time and energy by avoiding too many phases of passing content back and forth between team members. The order of editing processes usually follows the outline above—from bigger scale to smaller—and as usual, we find that the more you do upfront, the better. However, you may find that all chapters follow their own timeline to a certain extent, and from week to week may be at different stages of editing. Factors like the timing of what has already been written, what resources you have available, and what holdups arise will all affect the editing process.

The order of editing processes usually follows the outline above—from bigger scale to smaller—and as usual, we find that the more you do upfront, the better. However, you may find that all chapters follow their own timeline to a certain extent, and from week to week may be at different stages of editing. Factors like the timing of what has already been written, what resources you have available, and what holdups arise will all affect the editing process.

We also recommend the timeless strategy of underpromise and overdeliver on deadlines. This builds in some cushion for when deadlines get pushed back. This will help prevent the entire project from going off track if there are delays in small portions.

Once this initial substantial feedback has been provided, the original chapter authors will be given time to respond to the editing comments and suggestions. Then, it may be helpful for the revised chapter to go to another member on the team who has yet to see this section. Be sure to foreground exactly what type of feedback you are looking for at this stage, as it can be tempting for folks to give a bit too much for the context. It's okay to be directive here and provide a list (perhaps in the author guide) of exactly what should be checked. A second look may not be possible for all teams, so remember to adapt this workflow to suit your individual project timelines.

For the copy editing and proofreading portion of this work, we suggest that you rely on the stylesheet in your author guide that your team developed earlier on in the process. It can be best to save this portion of the work once the content has been formatted in your chosen publishing tool, to catch the most minor details at once. And as we said earlier, editing will always expand to fill the time you allot for it. Don't dwell on making everything perfect on the first go. Remember that OER are living documents with opportunities for improvement in future versions.

Finally, regardless of which of these editing phases you are in, you can work through this process in chunks. Rather than waiting for the entire collection of chapters, you can parse out a set of chapters to go through the substantial editing round, and once that's completed, move them onto copy editing and proofreading. Essentially, this amounts to staggering the work, enabling the team to continue to make progress as other project pieces are still in development. As you see, all these considerations are really meant to help you move things forward — to refine the resource, improve it, while keeping you on track with your timelines.

Hiring editors

Whether you rely on volunteers from your team or pay professional editors during this phase, the process allows you to incorporate external and/or non-expert feedback, making the book more accessible for all kinds of readers.

If you're looking to hire professional editors, you may want to turn to editorial associations such as the Editorial Freelancers Association (EFA) and the American Copy Editors Society (if you are based in the US or Canada), or freelancing sites such as Upwork. Note that costs will vary according to the type of work being done, the editor's experience level, and other factors, such as subject matter or technical expertise required. Be prepared for a range of hourly rates, anywhere from $25 to $125 (or more). The EFA has a helpful list of rates for freelancers, so we encourage you to take a look at them while carefully considering your project's editorial needs.

This is also an opportunity to collaborate with others at your institution and build capacity for future open projects. For example, are there any institutional grants available to hire editors? Are there ways to include students throughout the editorial process? It's also good to ask around in your professional networks, and perhaps ask for referrals for editors who might have worked on similar projects in your field.

For those looking for the least expensive path, we recommend that the project leads do a first round of subject matter and copy editing. After that, they can hand the book off to a developmental editor to look at as a whole, and finally to a versatile copyeditor who is familiar with your style guide. Although these editorial guidelines are generally true for most OER, remember that every project differs.

Rebus' experience

Over time, we keep being reminded that OER projects are never the same – they each have different goals, and as such, different needs. Below, we share a few examples of how editing has played out differently in some of the open textbooks that we've supported, so you can see how variable these processes can be.

Perhaps one of the biggest lessons learned to date is around timing and editing. We supported one project in which the project leads decided to keep things moving on a rolling basis, rather than waiting for all the content to be ready before moving it into the editing phase. In this case, a draft editorial workflow was prepared, and as chapter drafts came in from authors (often at different times), the team moved them to the subject matter editor right away, and from there on to peer review. On this project, it was decided that the content editor would also think about structure and take on a more developmental editing role, and that copyediting and proofreading would take place post peer review.

On other projects, we learned about the importance of a developmental edit. The Media Innovation and Entrepreneurship open textbook benefitted from the fact that one of the book's lead editors was both a subject- matter expert and experienced editor. A majority of this editor's time on the project was spent conducting a developmental edit of chapters in the book, ensuring the coherency in voice across the book, leading to a more cohesive and valuable resource for students and instructors. With open textbook projects that have multiple authors, this type of edit is extremely useful to check for consistency in structure, tone, voice, and language across the book.

Across multiple projects, we have run into some common questions that seem to recur:

- Should the author, editor, or both make changes to content?
- What is the clearest way to demonstrate workflow?
- How can timelines be effectively communicated and reinforced?
- How do we share common tools for editing, formatting, and revisions?

Giving your team some clarity over ownership, practices, and deadlines during the editing phase will make the process smoother. Trust us, we've had to learn this lesson the hard way!

As the project manager or lead of the editorial team, you are the ultimate decision makers for your open textbook. If you can't get the content into a state with which you are comfortable, you are not obliged to include it in the release. When something does go wrong (and it almost always will), there are some effective techniques for handling difficult situations with care and equanimity:

- Talk face-to-face with those involved, and if you can't be in the same room, at least try to be on-screen with each other.
- Consult frequently with your leadership team, soliciting and listening to their feedback.
- Make sure that the owner of the editing process is the messenger of news (good or bad)
- If you're the editorial process owner, feel confident when asking for changes to a chapter, and feel free to point to signed MOUs if you need to confirm your rights to use the content.

4.3: CONSIDERATIONS WHEN CREATING & EDITING CONTENT

As we've said before, creating high-quality educational resources entails more than just writing accurate content. Creating and editing quality educational resources requires other skills and considerations that should be given some thought up front, to ensure that your content can be read with a critical eye, while also serving the broader needs of open and inclusive education. The following is not an exhaustive list, but should help prompt you as you're entering and navigating the creation and editing phase.

Audience & reading level

The most important thing to keep in mind when creating content are the **learners and instructors** who will be using the book. Authors should have a clear sense of **who the resource is for, why it is being created, what need it fills in the field, and how best to keep it culturally relevant.** These details should be kept front of mind throughout the entire creation process to help shape and strengthen the text – for instance, through learning outcomes clearly presented at the start of each chapter or section, or examples in the book that ensure that all students will see themselves reflected or represented in the text.

We also recommend that editors keep in mind the reading level of the book's audience, as well as the learning objectives that it is supposed to meet. There are a number of online tools that perform readability checks on content, such as *Hemingway Editor*, but we also recommend speaking to instructional designers and librarians at your institution for standards and resources best suited to your context.

The **instructional design team** can help you find the best ways to deliver content to students. This perspective should be included from early on to avoid the need for retroactive changes, and so that the end result is an effective and valuable teaching resource. With this information, authors and editors can understand how reading levels affect their context, and help the content fit the best standards for target readers.

Accessibility & inclusive design

In a similar vein, it's important that you think of all learners when creating and editing your content, which means making sure it is released as an accessible resource that doesn't require much, if any, remediation to meet the needs of the students using it. We believe very strongly in building **accessibility** into content from day one, not only in terms of **technical accessibility**, but also **language** and **inclusive design**[1]**.** It's also worth remembering that designing for the margins is, well, just good design! It's remarkable how many best practices for accessibility make the text better for everybody reading it (e.g. clear hierarchy & structure, captions on videos, etc.), as well as the obvious benefit of supporting students with recognised disabilities.

Editing is about making the text work better for its readers—this means everybody reading it, including not only students with recognized disabilities, but all those with varying learning or language abilities. Make sure all editors understand that they have a role in this, and provide them with the guidance resources they need if they are not already aware of the specific issues at stake.

Again, try to reach out to accessibility and inclusive design teams or instructional designers (as mentioned in the previous section) on your campus for support if you can, so that you can incorporate good design practices into your book that benefit all students. Here are a few of the kinds of things you can do to improve your resource's accessibility in the writing phase:

1. Use heading styles in your documents to create a consistent hierarchy
2. Consider reading levels of the audience and adjust your tone accordingly
3. State the full-forms of acronyms during their first use in each chapter
4. Include alt. text for functional images
5. Use appropriate and clear link text (don't link words like "here", "there," etc.)
6. Prepare clear tables with appropriate header information, captions, and more

For more information and guidance on creating an accessible open resource, we highly recommend the *BCcampus Open Education Accessibility Toolkit*. We've also included a short list of basic considerations in our author guide template.

Think ahead

With a bit of foresight, there are a few tasks you can simplify by laying the groundwork while you write. For example, identifying and tracking where glossary or index terms appear as you write can be much easier than trying to locate them all at the end! Other examples of this kind of forethought we've seen include keeping track of the citations/references in each chapter for a bibliography, tagging key concepts using HTML classes

1. **Note:** According to the Inclusive Design Research Centre (IDRC) at The Ontario College of Art and Design University, inclusive design is "design that considers the full range of human diversity with respect to ability, language, culture, gender, age and other forms of human difference." Like the IDRC, we use the term inclusive design as opposed to universal design deliberately – see the section titled "Why not use the term Universal Design?" on the IDRC's website for more.

to make it easy to format them consistently with CSS, or keeping a spreadsheet to track images and other media to simplify licensing checks. Knowing what appears where in your book is always useful, and the more you can do along the way, the easier life will be in the long run!

Build for adaptability

Shifting focus slightly to the **instructors** who will be using the resource, wherever possible, we encourage you to create content that is easily **adaptable and modular**. One of the major goals of any educational resource is to encourage wide use, and a major advantage of openly licensed resources is that they can also be adapted and localised by those users. Take some time to consider the changes that other instructors may want to make as they set out to use your resource in their courses, and do what you can to make it easy for changes to take place. One way to do this is to **keep context specific examples in blocks** that can be swapped out for localised content (e.g. discussion of national policies, course, or institution specific information, etc.). Another way is to **be clear about licenses and attributions** of different elements in the resource (images, excerpts, videos, etc.) so that future users will not need to spend added time looking these up. This is especially important in the case of anything that has been included with a one-time permission or relying on fair use, and including a back matter section with this kind of information is one way to make it clear to future adapters.

Formatting & review

During the course of their work, authors and editors may serve as de facto formatters and/or reviewers. Content corrections, such as to headings, images, or captions can assist with the OER's formatting. As well, formal or casual feedback from editors (including proofreaders) can be taken as a non-peer, "generalist" review, which provides a student-like perspective, or someone else who is reading the book for the first time. Editors also provide benefit by thinking about the text as a whole, providing invaluable feedback in a way that a reviewer of a single chapter might not be able to.

Creation can be iterative

We also encourage taking the approach that **creation can be iterative**, meaning that content can be expanded on, revised, and improved over time. The first release doesn't need to contain everything you want to include in the long run, so you could, for example, release the core theory sections of each chapter, then expand over time with case studies, media elements, quizzes, in-class assignments, or other ancillaries. Alternatively, if your text has clearly defined sections, you could work on these one at a time, releasing them as you go. This helps to give a sense of progress (both to yourself and others), and can be a great way to encourage others to get involved – seeing the text coming together is often the best way for people to understand the project and see how they can contribute. And, with OER, releasing content is in some ways just the beginning! Other versions can emerge through the work of others that may then feed back into the original.

Model good practices (we're all human, and that means authors & editors too!)

Lastly, it's also good for you to think deeply about the expectations you have for your OER projects as it can help everybody involved be on the same page and contribute accordingly. A clearly defined author guide will help your authors create content with accessibility, equity, and open pedagogy in mind. You can use the author guide to surface particular points about your audience, share best practices for writing with accessibility in mind, and use the model chapter as an example of the tone, format, and structure a chapter should take. Doing so will make it clearer for authors how they can do their part, which also helps to reduce the amount of work needed in the editorial or formatting phases.

This, in turn, will also streamline the work of your editors as it hopefully reduces the time they need to remediate accessibility or equity issues after the fact. By telling them when something works well, it reinforces the models you want to see throughout the draft. Be nice in your comments and suggestions, and start with the positive aspects of what has been written—you want to be sure that the 'good' is preserved during the process of revising the less-good. Highlight both the positive and the issues in each draft, because it eventually creates a dialogue with your authors, while supporting the positive environment that will allow everyone to work on improving the OER.

4.4: TEMPLATES

As you've seen, there are many factors to be aware of during the creating & editing content phase. To prevent this process from becoming overwhelming, we've put together the following templates. Feel free to copy or adapt these for your projects as needed.

Author Guide (with Style Sheet) Template

This template may be used to support your teams as you are welcoming new authors on your project. Find an editable version here.

Content Tracking Template

This template may be helpful as you're tracking the progress of each piece of content. Find an editable version here.

Image Tracking Template

This template may be used as you are tracking images in your resource. Find an editable version here.

OER Structure Template

This template is meant to support your teams while planning the structure of your resource. Find an editable version here.

PART 5: FEEDBACK & REVIEW

Part 5 includes:

- Feedback & Review Summary
- Feedback & Review Overview
    - What is review and why does it matter?
    - Types of review & tools
    - The review process
    - Compassionate reviewing
    - After the review
- Review Guide Template
- Review Statement Template

5.1: FEEDBACK & REVIEW SUMMARY

There are many ways to get feedback and input on your OER – either from peers (however you choose to define this), those tasked to focus on the accessibility of the materials, and/ or the people (students and teachers) who work with the OER in classroom settings. Getting a seal of approval or recommendation from an external reviewer can help make your OER stronger, and more appealing to adopters. Feedback and review also provides you and your teams with another valuable opportunity to be intentional and ensure that your review process is equitable.

Underlying principles

Decide early on what you need from this process. Determine your goals and expectations before you bring on reviewers, so they can focus on giving you exactly what will be most useful.

Manage revisions with an open mind to strengthen your OER. Think back to your SLOs — whose subject matter perspectives are needed to help determine whether the OER is built to help students achieve these outcomes?

Review allows experts to share their knowledge. Beyond the credibility that they provide, peer reviewers' critical feedback and suggestions tend to improve the resource for its intended audience.

Model good behaviour. Set an example with how you communicate with reviewers, so that they communicate equally respectfully with authors. Provide pointers on how to review with compassion – highlight both areas that need improvement as well as those that have been executed well.The latter helps offer a model that revisions can work towards.

Who's Involved?

As we noted in creating & editing content, we believe a collaborative approach is key – and this phase is no different. There's a surprising number of people from your team who can take part in the peer review phase:

- Review coordinator: prepare the review guide, write calls for reviewers, manage recruitment, track progress, and relay information among reviewers and the authoring and editing team
- Reviewers: subject-matter experts who provide critical input and suggestions to improve the resource. (We recommend at least two reviewers per book or per chapter, if you are conducting a chapter- based review)
- Authors: incorporate reviewers' feedback, communicate with editors and reviewers (directly or through the review coordinator)
- Editors: coordinate with the authors and reviewers (or review coordinator) about revisions to the book, implement these revisions in some cases
- Project manager: communicate with the review coordinator (or act as one), share calls for reviewers and project updates

Key Tactics

Review generally takes place once all the content has been written and edited, but it can also happen on a rolling basis if you are conducting a chapter-based review. In both cases, it's important to do some prep work so that the process runs smoothly from start to finish:

- Determine which of the review processes (peer review, classroom review, accessibility review) to include in your project timeline
- Establish peer review and accessibility review workflows for your OER, so everyone involved understands the process
- Create a review guide to share with your team with a simplified version of your project summary, links to the book or content, general reviewer guidelines, project-specific questions you want addressed, deadlines, tools, reviewer etiquette, compensation (if any), and ways in which reviewers will be credited.
- Create a call for reviewers that includes project details, intended audience level, criteria for reviewers, and instructions for indicating interest. The call should also encourage members of underrepresented groups or those in diverse cultural, geographic, or social contexts to

participate.
- Communicate the rigor, quality, and value of your resource through a peer review statement and accessibility assessment
- Credit the work that reviewers have done in your team communications, and if possible, send reviewers a thank you card, personal email, or print copy of the book.

Reviewers are often involved because they believe in the value of the project, and we hope these suggestions will help you make it an enjoyable experience for them, while also receiving the feedback you need for your resource.

5.2: FEEDBACK & REVIEW OVERVIEW

This section of *The Rebus Guide to Publishing Open Textbooks (So Far)* will help you coordinate and implement review processes on your OER, including advice on deciding which of the review processes to include in your project, the tools to use, creating a review guide, and how you can manage revisions with an open mind to strengthen your OER.

What is review and why does it matter?

The ultimate purpose of review is to ensure that your OER is well-structured and ready to be used in the classroom. Review can help you get critical input and suggestions for change that will make your OER even stronger. The way we see it, review happens at many different stages. It can happen as feedback during the project scoping phase, or growing & managing teams, as you're thinking about the voices that are represented throughout. We believe this approach is helpful to create valuable resources that center student experiences, create equitable classrooms, and genuinely support student success.

It's also a chance to dispel the notion that "if it's free, then it can't be good," because as we know — the OER you are creating are certainly high-quality learning resources. Review signals to prospective adopters that the work has passed through rigorous quality control, and that its content is suitable for use in the classroom. Not only does it give a public indicator of usefulness to potential adopters, but from experience we know that external reviewers in the field will very often end up adopting the text they've reviewed themselves, so it's great 'advertising.'

Finally, this stage also provides you and your teams with another valuable opportunity to be intentional and ensure that your review process is equitable. There are many ways to get feedback and input on your OER – either from peers, those tasked to focus on the accessibility of the materials, and/ or the people who work with the OER in classroom settings. **At heart, review is about bringing more hands on deck to invest in and help improve your resource.**

Types of review and tools: what's right for you?

There are many ways to get feedback and input on your OER – either from peers, those tasked to focus on the accessibility of the materials, and/ or the people who work with the OER in classroom settings. Consider what you would like to get out of the review process – are there particular **expectations** or **goals**? For instance, you may want peer reviewers to ensure that the OER's content and tone are consistent for an undergraduate audience at the first-year level. Or you may want to improve teaching and learning with the resource by gathering feedback from teachers and students using the OER in the classroom. Or you may want to allow for accountability on accessibility standards by reviewing the resource in all formats with an accessibility lens. Setting these goals will make it easier to prepare a guide for reviewers, recruit the right experts, and ensure that you get something useful out of this process.

Before you begin looking for reviewers, it's important to decide what kind of review you would like to conduct on your project. We think all kinds of reviews are valuable and therefore 'prestigious,' so when deciding which is right for you, look back on the goals that you have set with your team earlier. In what follows, we want to provide you with a quick overview of three different types of reviews you can choose to conduct:

Peer review

A peer review is a critical read of your resource from another subject matter expert, useful to identify gaps and inconsistencies in your resource. 'Peers' can offer constructive feedback and solutions to improve the quality of educational content. We want to emphasize that the term 'peer' does not solely mean academics – consider what types of feedback you need and who can speak to the quality of your content besides another instructor — would an industry expert or community member be able to provide valuable input? In academic and educational publishing, there are many terms that are used for different types of peer review. At Rebus, we like to keep things simple, so for us, the biggest choice is **whether your review will be anonymous or not**.

In an anonymous peer review process, authors and reviewers' identities will be unknown to one another and, potentially, editors. Conversely, if you don't want to keep the process anonymous, these identities will be known, which might allow authors, editors, and reviewers to be in communication if need be. When deciding which is right for you, look back on the goals that you had set with your team earlier – if your priority is to follow a largely formal/traditional process for the perceived "prestige" value (we think all kinds of review are equally valuable and prestigious, but the reality is that opinions and perceptions differ), you might want to keep things anonymous. Or, if you want to be able to engage collaboratively with and publicly credit volunteers, you may want to know who they are from the start. What's important is that you have experts looking through the book, and identifying areas for improvement.

If the purpose of review is truly to make this resource better and more accessible for all students, then we need to be looking beyond just reviewing the content and really contextualizing the resource for our students to improve the quality of the OER and the learning experience. To do this, we encourage you to **reflect, recognize, and minimise biases** in peer review. Think back to your Student Learning Outcomes — whose subject matter perspectives are needed to help determine whether the OER is built to help students achieve these outcomes? Below are some discussion questions for you and your team to consider while creating review processes and workflows:

- How will your team attempt to manage the effects of bias in the review process?
- How will your team work to invite a more diverse range of reviews and value a broad range of perspectives?
- Are there non-traditional subject matter experts you'd like to work with? (students, community members, industry experts, etc.)
- Are there project specific questions you would like to ask during the review process?

Accessibility review

Accessibility is about ensuring that what you are making, whether it's a website, drawing, video, textbook, etc. can be used and understood by all people, regardless of location, language, context, tools, disability, or more. Accessibility can be broken into two criteria: **content** and **technical**.

Content accessibility prompts us to think of questions like:

- Is the content created with the audience in mind?
- Is the content well-structured so that the learning objectives can be met?
- What's the reading level of the content?
- Is it written in an understandable tone or vocabulary?
- Are things like images, tables, etc. used effectively, and only when necessary?

Technical accessibility, on the other hand, is a more specific way to think about this through the lens of web accessibility. According to the Web Content Accessibility Guidelines (WCAG): "Web accessibility means that websites, tools, and technologies are designed and developed so that people with disabilities can use them… [It] also benefits people without disabilities."

A bulk of the accessibility work can take place during the content creation stage. So you need to build best practices into your workflow. Otherwise, remediation will prove to be very time-consuming, expensive, and inefficient. It's important to recognize that we don't have to know the best method or approach for addressing a particular concern in all situations. Instead, lean on those you are collaborating with to find solutions.

The **accessibility review** involves a thorough run through the different output formats of your OER looking specifically at the web accessibility in each format. A specific set of accessibility criteria can guide the people in your team who are tasked with this form of review to ensure that your resource meets the desired accessibility standards. We believe it to be a vital part of the publishing process and creating inclusive OER.

You should conduct a **set of final checks** on the books to see what accessibility standards are met and to identify areas for improvement, corresponding to the BCcampus Accessibility Checklist. Remember, the goal is to make as accessible an OER as you can, knowing that there is **always opportunity for improvement** down the road.

Classroom review

The classroom review, or piloting your resource in the classroom setting is something you won't be doing for a while, but it is important to plan for it in advance as it will be the true test of your OER with its intended audience! Classroom review involves collecting feedback from both the instructor(s) who will be using the materials to teach and the students who will be learning with them.

This form of review is particularly powerful because it invites feedback from the students which ultimately will help your team to determine necessary improvements for future iterations.

Students can also help you pay attention to non-'academic' measures on the book to see the impact that your OER could have — for instance, are students finding the content more intellectually stimulating thanks to the OER? Are they persevering more in the course? Is this work or class participation joyful? Do they have more agency as learners, as individuals in a classroom?

As for the feedback you can get from instructors using the book, it might provide you with a slightly different perspective than you will get from your peer reviewers. Because instructors are knee-deep into the teaching with your resources, they could suggest changes to the flow, or suggest how particular concepts could be aided better through different examples or further explanations. Instructors might also give you ideas for what other types of supplementary materials would be most useful. As you can see, this is just as important as peer review in many ways!

Finally, once you've decided on what type of review(s) you will be conducting, you should discuss at **what stage** you would like to share the content with reviewers – before it has been edited, or after. This choice might be affected by the resources you have access to as a project, as well as what you are asking reviewers to focus on during the review. Do note, though, that other project tasks could be taking place while review is ongoing (such as accessibility checks, glossary development, permissions, etc.), so there's no need to bring you project to a halt for this stage.

The review process

Similar to Creating & Editing Content, putting in planning and decision-making time up front is one of the most important things to do. Transparent documentation and good project management helps your teams understand expectations, keep consistency throughout the resource, and creates a positive experience for everyone involved!

Assign a review coordinator

If you're reading this guide, chances are you've decided that you want your OER to go through a review. But how do you actually go about organizing this process? The first step should be to decide who will oversee the review process. It may be that you're happy to coordinate the process, but if you need help, or you don't want to have contact with your reviewers, we recommend recruiting a **review coordinator**. Whoever acts as the coordinator, they will be responsible for preparing the review guide, managing recruitment, tracking reviewers' progress, and relaying information between the reviewers and the authors, editors, and/or project managers as needed.

Once you have a coordinator there are a few things that you and your team should discuss.

Create a review guide

Once all the major decisions regarding the review process have been made, you can turn your attention to preparing guidelines for reviewers. This may be something the review coordinator takes on, or might be a **team effort**, with input from the project managers and editors.

If you like, you could start with our review guide template, and **fill in information about your project**. Make sure to include details about the **audience, guiding questions** specific to the project (these should tie into the goals discussed earlier), **deadlines** (multiple, if review is taking place on a rolling basis), **tools** and how to provide feedback, and **compensation** (if any) or other ways that reviewers will be credited or recognized in the project and final text.

To better structure your review process and support reviewers, work with your team to identify **expectations and central guiding questions** in your review guide. This will direct their focus to specific criteria, and use their time judiciously in their review. There can be many different lenses/criteria to keep in mind when reviewing the resource, many of which are in our review guide. We suggest coming up with 3-5 central questions to keep things manageable. These questions could be about the DEI additions to the book, the interactive elements created, or a careful review of how materials work to help students meet the Student

Learning Outcomes (SLOs). Include these types of questions in your review guide, or let them inform the focus or guiding questions you add in your review guide (eg. for a healthcare OER you could ask: Does the content reflect, value, validate, or reference non-western medicinal practices?). Crafting these questions will help your reviewers prioritise revisions in these key areas. The review guide is also a good place to offer some guidelines around compassionate reviewing — remember, the purpose of review is not critique for the sake of but rather to offer positive and constructive feedback to improve the resource!

This sample review guide follows the structure outlined above, and can be adapted — this example review guide incorporates project specific guiding questions with the core components of review. Both example guides are licensed CC BY, and you can refer to or adapt each as suits your project's needs.

Recruiting reviewers

Finding reviewers can be a challenging task, but far from impossible. We have a separate chapter dedicated solely to recruitment efforts, which you are welcome to read through, but here are some takeaways specific to finding peer reviewers.

The key to successful recruitment is having a **clear and concise call.** Your call should be short, informative, and direct interested candidates to the right place. You should aim to include the following details: a **brief description** of the project, with a link to the public listing page; the **intended audience**; **criteria for reviewers** based on what you'd like to get out of the review process; and **clear directions to volunteer**. Here's a sample call posted on a public forum, and an example of various kinds of copy used for emailing potential volunteers.

You can also include a few lines encouraging members of **underrepresented and/or historically excluded groups** within the community and people working in **different contexts** to your own to apply (e.g. different regions/countries, different kinds of institutions etc.) – having a wide range of perspectives assessing your content will help to ensure that it meets the needs of all students in the long run!

Before sending out the calls, you should also be **prepared to track responses** from potential reviewers. Use the team's preferred tools, such as Google Sheets, to collect a list of interested candidates, confirmed reviewers, contact information, deadlines, and status. Doing so will make it easier for you to oversee the process, and not have to sift through emails or chats for an update. We're prepared a review tracking template that you could copy and adapt for your project.

Once the call and the tracking sheet are created, you're **ready to send out** your call! A great place to start is **mailing lists or listservs** that are specific to your field or discipline. You can also share the call with the Rebus Community, on **social media**, and in your **personal networks** (and encourage others on the **team** to do the same). A good option is to have each team member write up a list of all the people they think are qualified and who might be interested, and send them each an email asking them to act as a reviewer. The personal touch goes a long way! It may take a week or two for you to start receiving responses, so be patient, but if you find that you haven't had the response you hoped for, you could also send out cold calls. This involves some good old fashioned internet sleuthing to find faculty you think might be suitable for the role. Sending out **cold calls** is time consuming, and can have low response rates, but if you pick your candidates wisely (making sure their expertise aligns with the project), you might be surprised at how willing people are to be involved.

Lastly, many open textbook projects don't have much in the way of funding, and often none at all, so financial **compensation** for reviewers won't always be possible. While we do encourage you to look for sources of funding for your reviews, we fully understand that this simply may not be possible in all cases. Reviewers may ask about compensation outright, as it is fairly common to be paid for review of other scholarly works, so make sure you have an answer for them. If no funds are available, you could let them know of any other recognition you could provide them, and to reiterate the importance and potential impact of your project. Money isn't the only motivator, so share a bit more about the project and see whether this inspires them to participate. For example, it's a nice gesture to **send a physical copy of the book to the reviewer** as thanks, if you're printing copies of the book, and have the capacity to do so. Alternatively, a thank you card or personal email can do the trick – or an offer to return the favour and review their future open resource.

Managing the review process

Of course, the 'review' stage doesn't end after the review has been submitted, and you've shared your thanks with the reviewers for their work. The obvious next step is to figure out how to incorporate the feedback! This is most often done by the authors themselves, with the editors or project managers coordinating, but sometimes the editors may take on the changes themselves. There are also inevitably decisions around which suggestions to take, and which to defer or leave aside. We outline what the peer review process can look like below (note: this might look slightly different on your project, or for a classroom or accessibility review).

As responses start filtering in, you can update your tracking spreadsheet and assess whether the respondents are right for the role. Make sure to **respond to reviewers** who have been selected, and offer a note to the ones who haven't! You can **confirm details** with selected reviewers, sharing a copy of the **review guide** and setting a **clear deadline for completion** of the review (we recommend allowing at least 4-6 weeks if you're asking them to look at a book-length resource).

During this exchange, you should also (of course) **share the content** with the reviewers, or get this to them as soon as possible. Ideally, you'd like to send content to reviewers immediately after they express their interest in the task, so as to avoid any waiting around.

Once all the details are confirmed and content has been sent, you can let the reviewers start the process and largely leave them be. However, we do recommend a **series of check-ins** leading up to the agreed upon deadline to make sure that the reviewer is all set, that they don't have any questions, and to make sure they are still committed to completing the task. You can check-in as many (or few) times as you like. We recommend doing so:

- 2-3 weeks after you confirm the details with them
- A week before the deadline
- One (business) day after the deadline if they haven't submitted
- Then as often as needed to get a response from them before it is clear they are no longer participating in the project

The next step is to **collect the reviews** as they roll in, and **pass them along** to authors or editors. Be sure to **send thanks to the reviewers** for their time and feedback. You should encourage them to adopt the book when it is available for classroom use, and let them know you'll share updates about the project with them as things progress.

Depending on the nature of your project and the type of review process you have selected, you can also ask reviewers if they would like to communicate with authors or editors as changes are being implemented. We also suggest you **send ongoing updates about the project to reviewers**, especially when the OER is released. More often than not, they're excited to hear about the progress, and (very importantly!) they could be **potential adopters** once the book is out. Share the announcement of the resource's release with them, and encourage them to spread the word in their institutions and networks – as reviewers, they're in the perfect position to vouch for the text.

And finally, it's also good to ask reviewers to share their feedback about the process overall, so you can keep it in mind for the rest of the project!

Compassionate reviewing

Another important piece of OER review is to ensure that you are not soliciting reviews that are unduly harsh and that you manage revisions with compassion! Reviewers should keep in mind that they are providing feedback on something that has taken your teammates a lot of time. Highlight both the areas that need improvement as well as those that have been executed well — the latter helps offer a model that revisions can work towards. Have an explicit section in your review guide that highlights that reviewing isn't just about critique – it's a collaborative dialogue.

At the same time, remember that reviewers are people too! They might have their own reasons for not participating, stepping down from the project, or requesting delays. While you have a timeline that you'd like to follow, try to be understanding as the inevitable obstacles or delays come up. Look out for the people involved in your project, and if anyone does have to drop out of the job they signed up for, think about how else you might be able to keep them engaged.

When it comes to revisions, be sure to keep an open mind and use your student learning outcomes and primer questions in the review guide to help your team make these suggestions to strengthen your OER. Screen the comments and identify any low priority suggestions, harsh phrasing, etc. & address these challenges before it goes back to the author. This is just one of many feedback opportunities your team will have. There will be time to revisit this work in the future based on feedback from adopters, students, & their own experience of using these resources in the classroom. Remember: OER are living documents, so your resource will likely grow and evolve as it is used.

Conversely, be sure to thank reviewers for their service! Reviewers are often involved because they believe in the value of the project, especially if they're volunteers, and as the one in charge, you can make sure they enjoy the experience and feel appreciated!

After the review

Once your OER has gone through a robust review and revision process, what happens next?

Earlier in this guide, we mentioned that how you discuss and describe your work – internally and externally – is important as it informs the decisions you make in your OER. Storytelling is a meaningful tool to help you communicate the people, purpose, and vision of your work through every stage of the OER publishing process. In fact, an underlying goal for every stage of OER development should be community building and engagement – there's nothing better than the words of others to vouch for your resource because individual testimonials indicate a genuine stamp/seal of approval.

We recommend that once all the reviewers have shared their feedback and changes have been made to the content, it's good to include a **Review Statement** in the book back matter. By creating a review statement and accessibility statement and adding it to your book's front or back matter, you send potential adopters or readers a few clear signals:

- That the OER is high-quality and meets comparable standards as other textbooks/learning materials
- That it has been built with care and attention to student learning, especially if you name your reviewers in this statement
- That feedback and iteration is built into your approach – the OER can be improved over time

This is also a great chance to list reviewers (if agreed that they'll be credited) and publicly recognize their work on the project. Here's a review statement template that you can work with, and you can take a look at an example statement from another open textbook. Keeping compassion in mind, remember that real people have put in the work behind the project, and it's vital to highlight and uplift that!

We believe the most powerful tool in OER is an active community, so down the road, you can think of this broader reviewer community as one to stay connected to to offer updates and news about the OER. **And whether you work with just an internal team of reviewers or also coordinate with external reviewers, show them your thanks in whatever ways you can.** It's important to recognize the labour behind the resource and make the review processes transparent. This is especially valuable if you are looking for avenues to reward and recognize the work of contributors.

Let's end with a quick reminder: revising OER is iterative, feedback can help this process take place, and feedback comes from people — so plan and treat those involved with this process with care. That will show through in your final OER and the connections you build around it!

5.3: REVIEW GUIDE TEMPLATE

This template may be used as you're conducing peer review on your project in Google Docs or Hypothes.is. Find an editable version here. This template was adapted from a similar work created by Billy Meinke-Lau at the University of Hawaii, and includes a rubric developed by BCcampus Open Education. Our thanks to Billy and the team at BCcampus Open Education.

Rebus Community Review Guide

Welcome to the guide for Rebus open textbook reviewers. This guide is meant to help you give great, useful feedback on the open textbooks we are helping to develop. You are welcome to print this Google doc, make a copy for yourself, or share with others.

Please read through sections below, and use this as a reference as you complete your review. If you have any questions, email the project lead.

Before We Begin

As we strive to work openly, all contributions made to this textbook will be licensed under a CC BY 4.0 International License. Your name will be mentioned in the published version of the book as reviewer.

No OER can serve all learners, so it is important to be aware of the context the book is meant to live in. Take a moment to read through the project summary to familiarise yourself with the book's purpose and audience before beginning your review.

About This OER

Include a quick summary and description of your project and book here. You should also link to project info page, so interested readers can learn more.

Audience

Insert a few sentences about the OER's intended audience here. For example: "This OER is meant for use in first-year introductory courses. The audience will primarily consist of undergraduates pursuing the major, however can *also include some mixed-major undergraduates." You can include as much detail as you think is necessary, such as technical requirements, reading levels, etc.*

Core Components

If there were one single question your review should seek to answer, it should probably be:

"To what extent is the book successful in meeting the needs of its primary market?"

— tonybates.ca

When reviewing drafts, also consider the following. (*Note: the second item of each criterion asks the review to rate it on a scale of 1 to 5 (1 = very poor and 5 = excellent)*):

1. **Comprehensiveness:** The text covers all areas and ideas of the subject appropriately and provides an effective index and/or glossary. How do you rate the book's overall comprehensiveness?
2. **Content Accuracy:** Content is accurate, error-free and unbiased. Overall, how do you rate the accuracy of the content?
3. **Relevance Longevity:** Content is up-to-date, but not in a way that will quickly make the text obsolete within a short period of time. The text is written and/or arranged in such a way that necessary updates will be relatively easy and straightforward to implement. Overall, how do you rate the relevance/longevity of the resource?
4. **Clarity:** The text is written in lucid, accessible prose, and provides adequate context for any jargon/technical terminology used. Overall, how do you rate the clarity of the book?
5. **Consistency:** The text is internally consistent in terms of terminology and framework. How do you rate the overall consistency of the resource?
6. **Modularity:** The text is easily and readily divisible into smaller reading sections that can be assigned at different points within the course (i.e., enormous blocks of text without subheadings should be avoided). The text should not be overly self-referential, and should be easily reorganized, and realigned with various subunits of a course without presenting much disruption to the reader. Overall, how do you rate the modularity of the text?
7. **Organization Structure Flow:** The topics in the text are presented in a logical, clear fashion. Overall, how do you rate the organization/structure/flow of the text?
8. **Interface:** The text is free of significant interface issues, including navigation problems, distortion of images/charts, and any other display features that may distract or confuse the reader. Overall, how do you rate the textbook's interface?
9. **Grammatical Errors:** The text contains no grammatical errors. How do you rate the grammar and spelling of the text?

10. **Diversity and Inclusion:** The text reflects diversity and inclusion regarding culture, gender, ethnicity, national origin, age, disability, sexual orientation, education, religion. It does not include insensitive or offensive language in these areas. Overall, how do you rate the diversity and inclusion of the text?

Feedback

Project Specific Questions

This is where you can add guiding questions for reviewers that are specific to your project. This helps to draw their attention to any areas you think need particular consideration, and helps ensure the feedback you receive is valuable.

For example, if the focus is on DEI improvements, you could ask questions like:

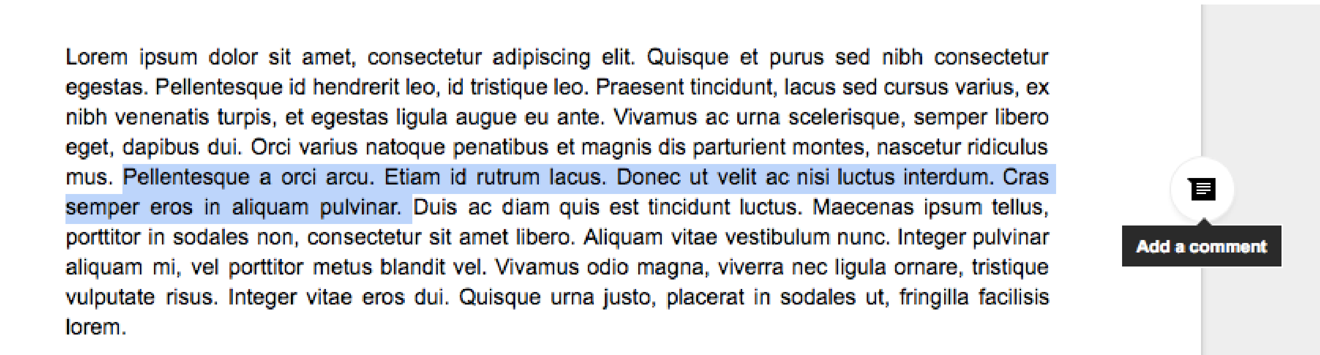
1. Are Black, Indigenous, and People of Colour scholars, researchers, and contributors represented?
2. Is content (both text and non-textual elements) diverse? Does it value differences and welcome diverse perspectives?
3. Is there any evidence of unconscious bias within the resource? Look for words that carry unintended negative weight or form generalisations or stereotypes. You can also review the APA Bias-Free Language Guidelines for more recommendations.
4. Have intersecting identities been considered in the resource? As Black poet, writer, and activist Audre Lorde (1982) said: "We do not live single-issue lives."
5. Many of you are already familiar with the term intersectionality. This is a term coined by Kimberlé Williams Crenshaw. **Intersectionality** asks us to recognize the complex ways in which multiple forms of discrimination (such as racism, sexism, ableism and classism) overlap, highlighting "the multiple avenues through which racial and gender oppression [are] experienced." (Kimberlé Williams Crenshaw, 2015) Be sure to list some of the intentional strategies you have employed so reviewers can assess if this is done well.
6. Are gender/sex/sexual orientation, racial, cultural, religious, age, disability, class, language and geographical diversities reflected in this resource?

Leaving Feedback (Google Doc)

Please leave feedback in the Google doc using either the Comments tool or by providing feedback with the Suggestions tool.

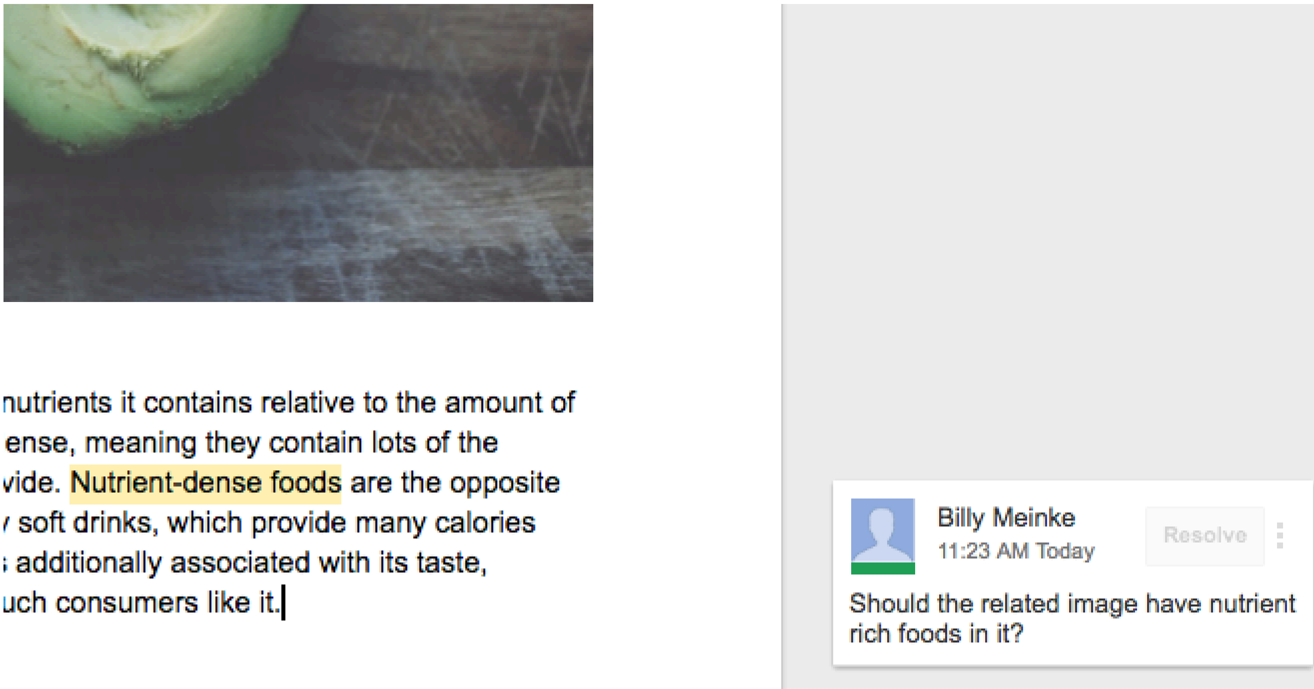
Commenting

Leave a comment in the document by selecting a portion of text, and clicking on the comment icon.



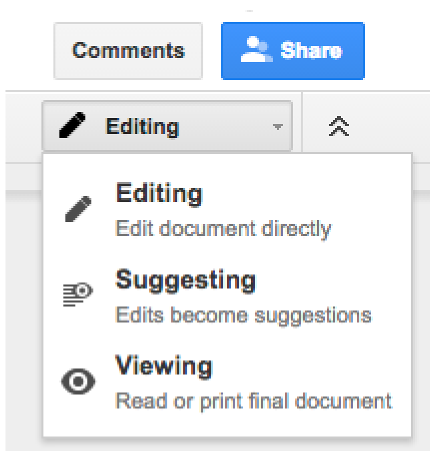
Alternatively, you can select the text, and choose **Insert** > **Comment** on the menu at the top of the page, or use the keyboard shortcut for your computer. You can select individual words or whole sentences, leaving feedback on specific parts of the document.

Once you enter your comment, be sure to click on “Comment” to save it. Once it is saved, it will appear next to the selected text. You can edit or delete a comment by clicking on the ellipsis in the top right corner of the comment.

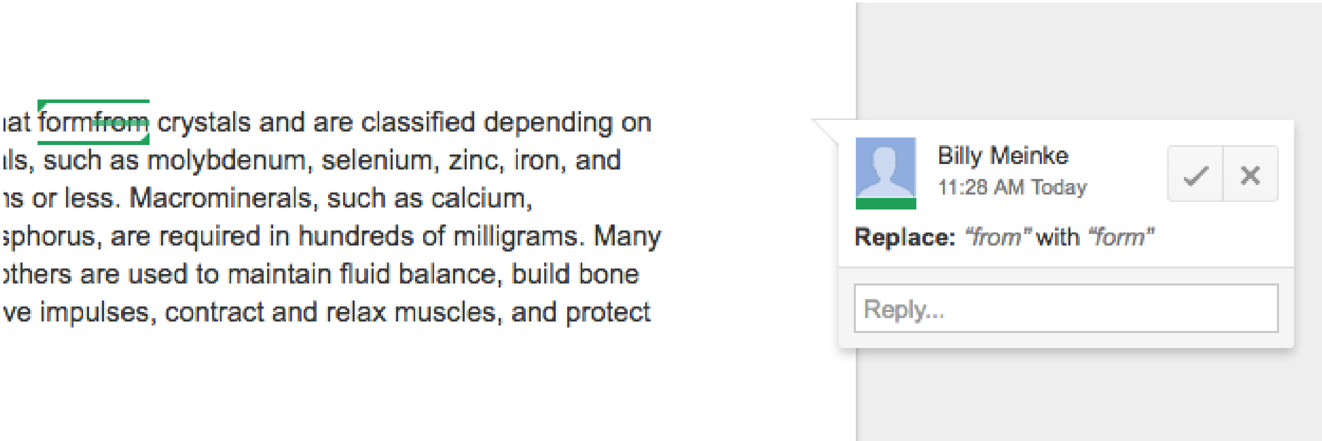


Suggesting

You can also leave proposed edits in the document by switching to Suggesting mode in the upper right-hand part of the document.



Similar to track changes features of other word processing programs, the authors will see your proposed change and selectively roll or edit them in.



When in doubt, begin by leaving comments. Use the Suggesting mode as it is useful to you.

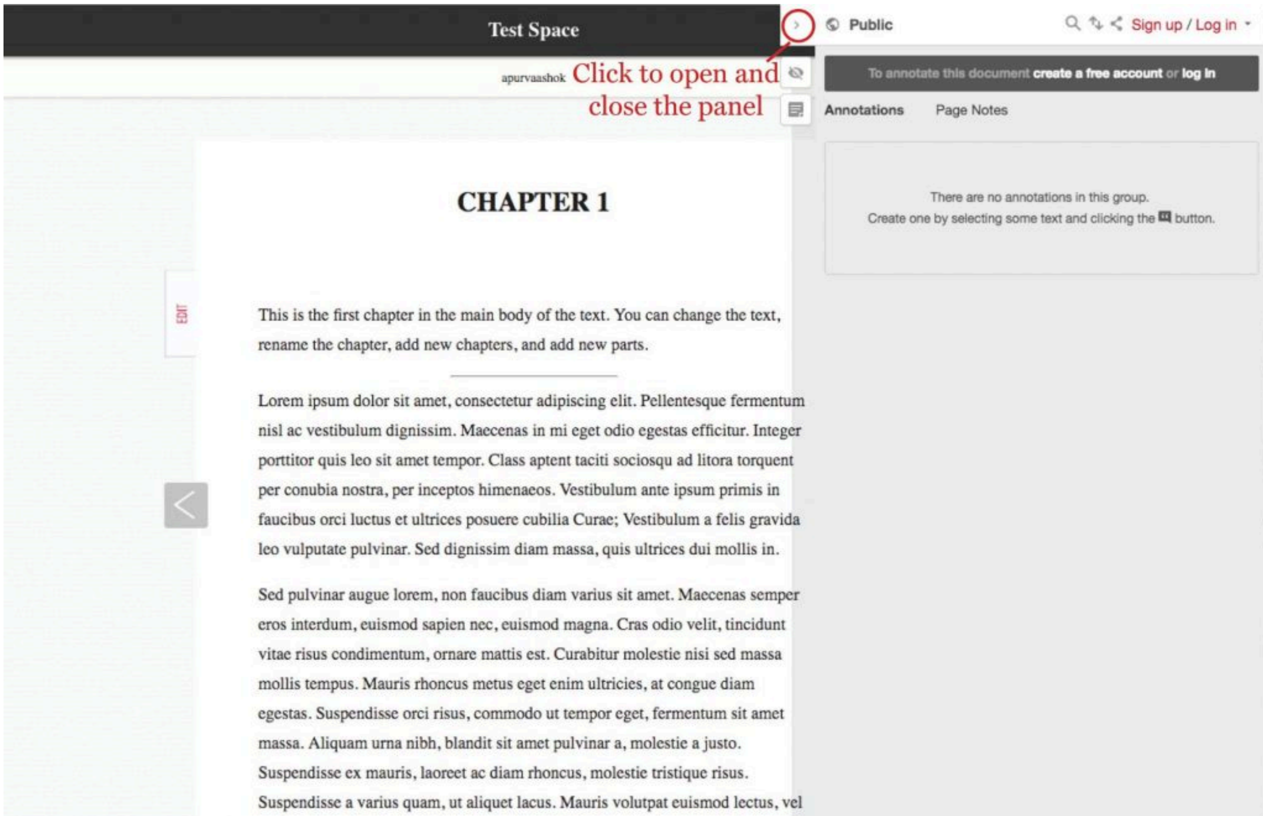
Leaving Feedback (Hypothes.is)

Please leave comments on the web version of the text using Hypothes.is, and/or provide a short memo summarising your feedback. This memo can be submitted to the project lead or review coordinator. Please also notify the lead and coordinator when you have finished making your comments in Hypothesis, if you choose to do so.

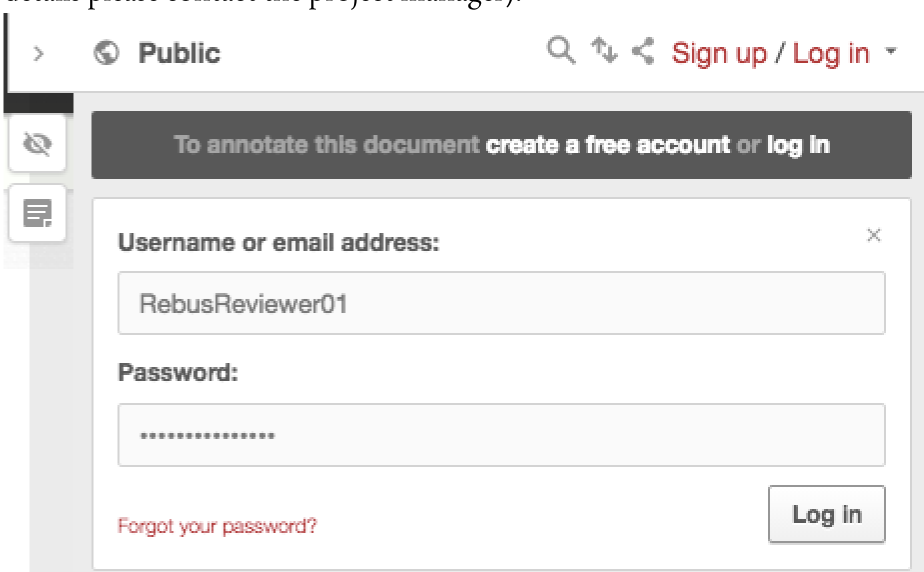
How to Use Hypothes.is

In-line Comments

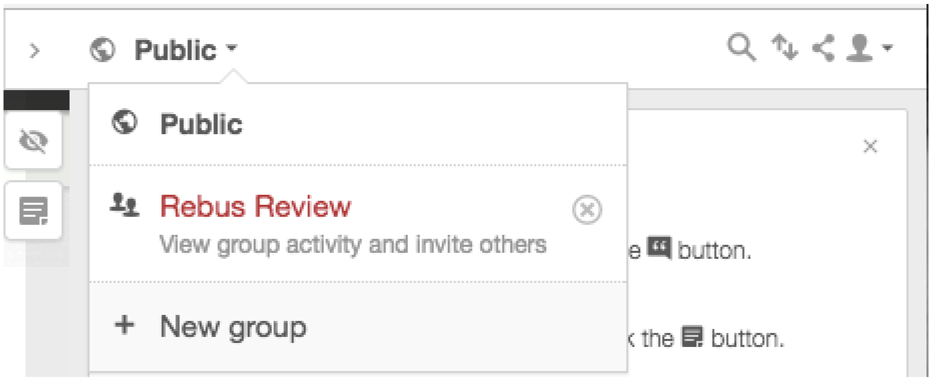
1. Open the chapter you are reviewing in your browser.
2. Open the Hypothesis panel by clicking on the left arrow in the sidebar.



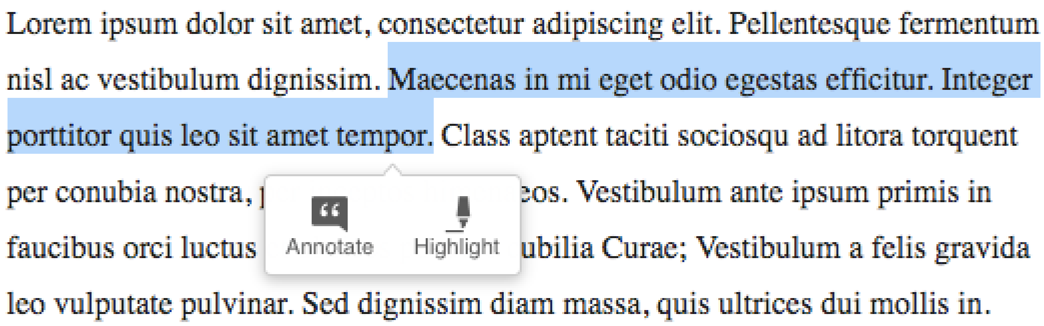
3. Log in using the username and password provided by Rebus (if you have not been provided with these details please contact the project manager).



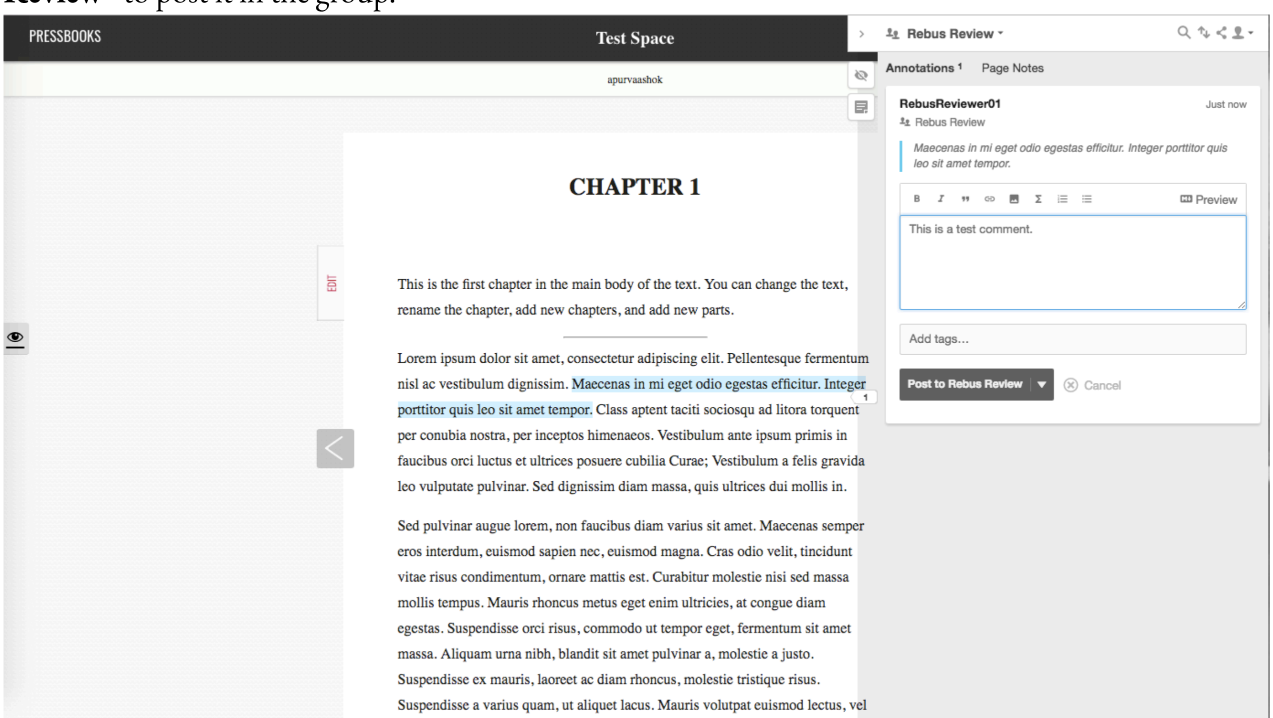
4. By default, Hypothesis annotations are made to the Public group. For the purposes of peer review, a group called Rebus Review has been created. To make annotations to this group, click on the dropdown menu next to **Public**, and select **Rebus Review**. All of your annotations will now be made in this group, and will remain private.



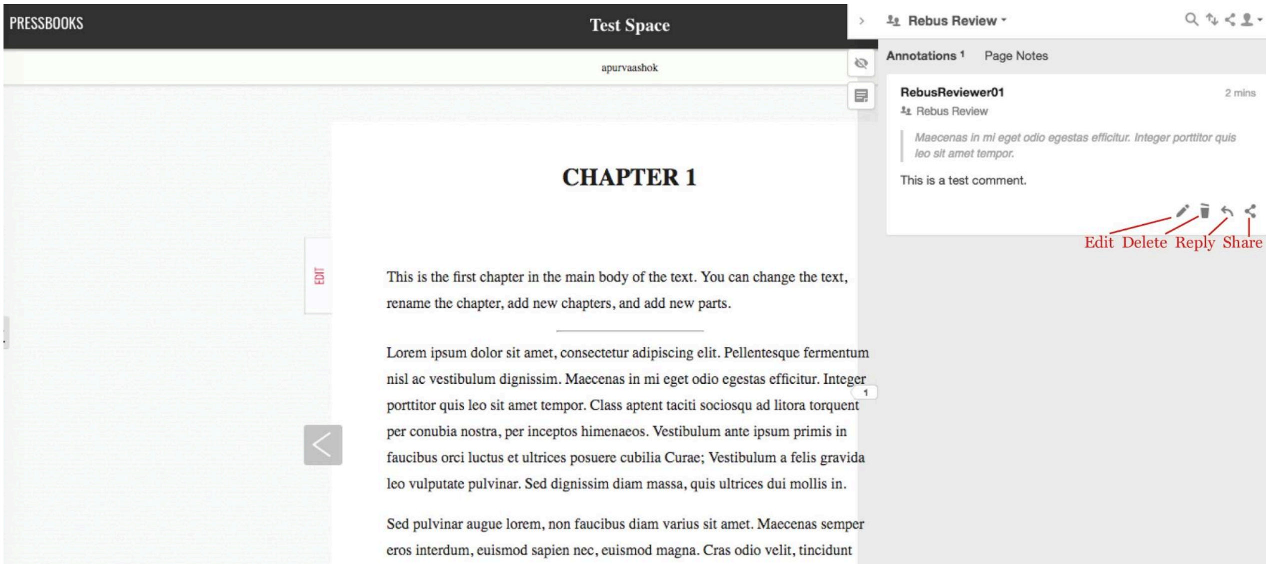
5. Select the text you would like to comment on or highlight.



6. Click on Annotate to add a comment. You can type in your comment and click on **"Post to Rebus Review"** to post it in the group.

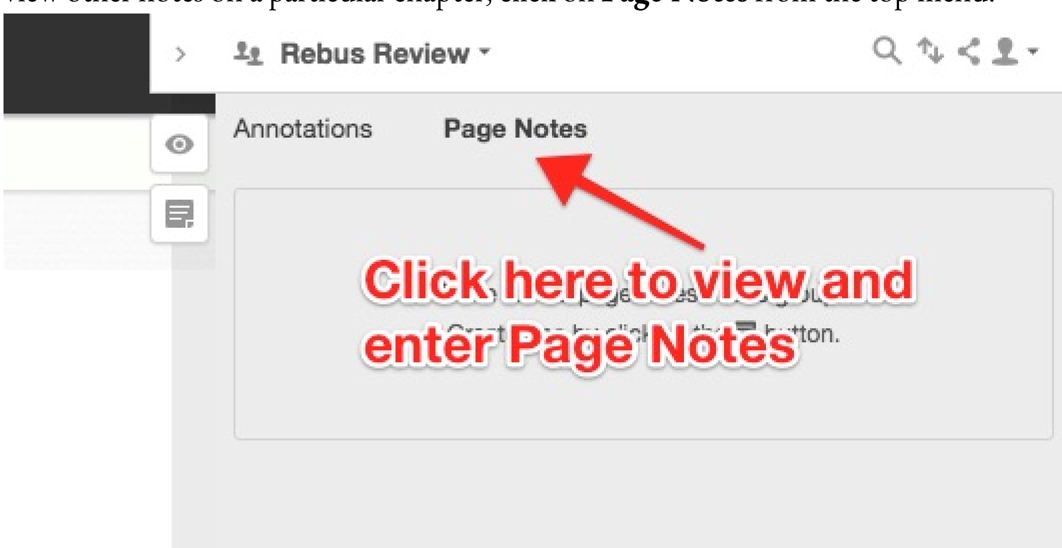


7. You can edit, delete, reply to or share your comment once it has been posted by using the buttons on the bottom-right of the comment box.

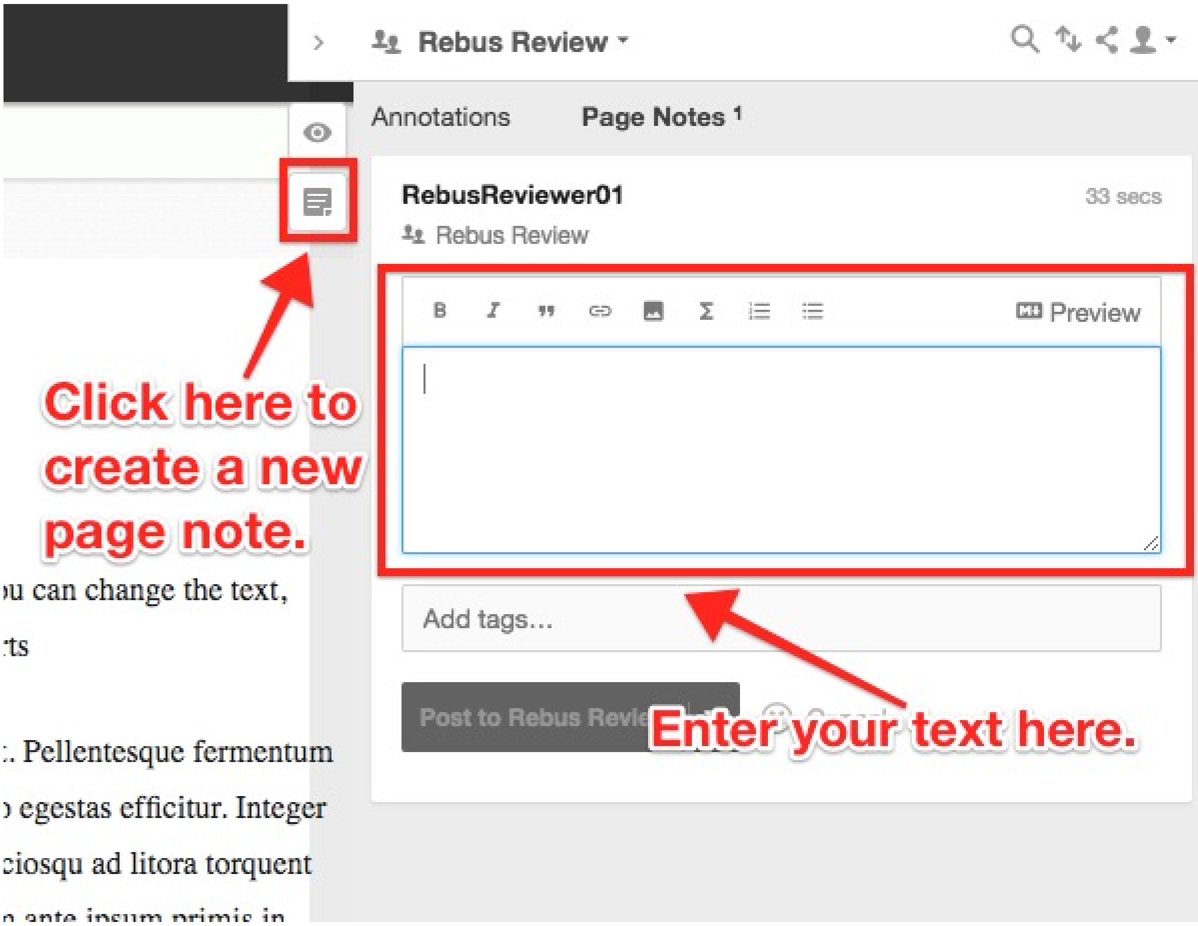


Page Notes

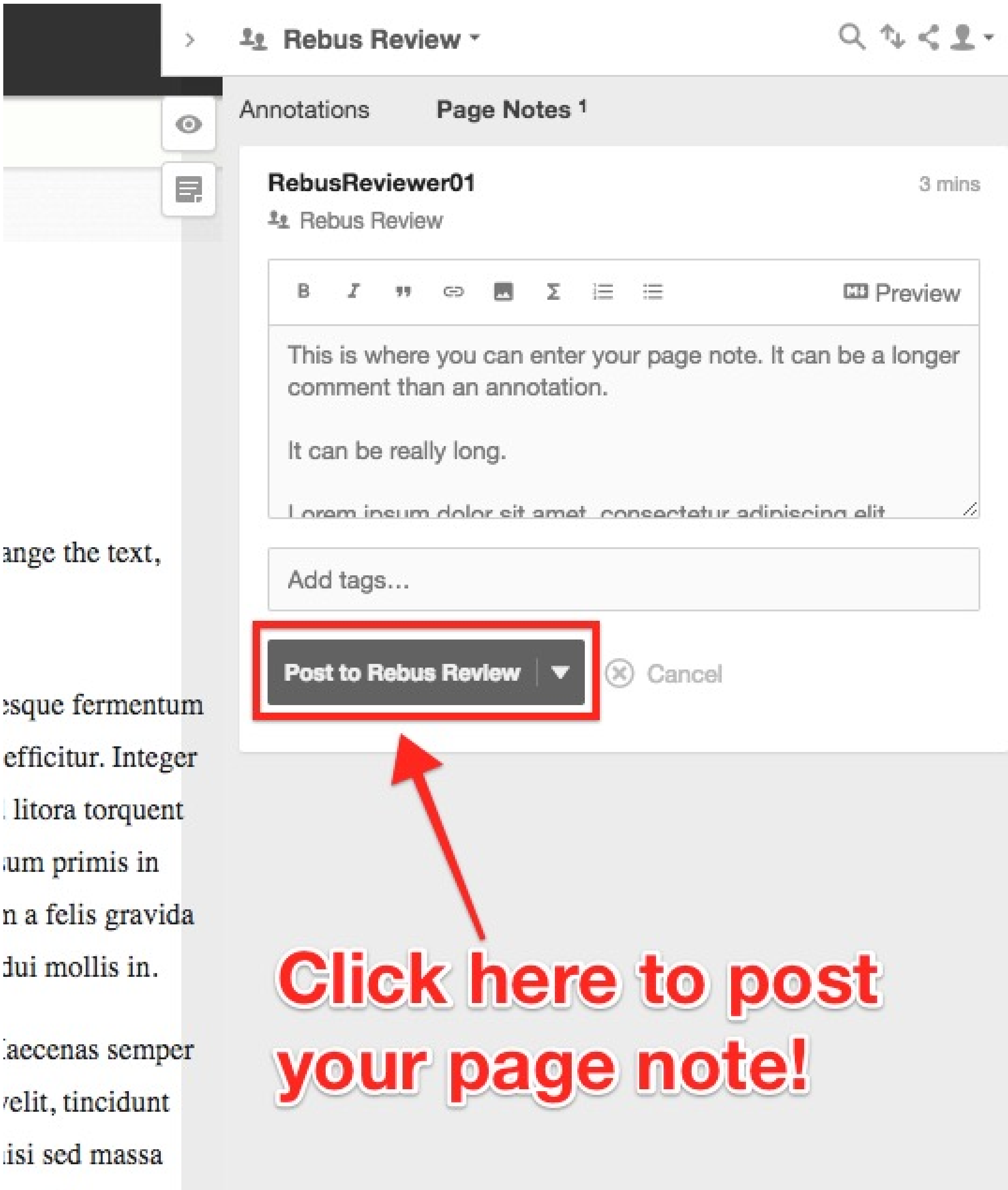
1. Log in to Hypothesis account using the account and password provided by Rebus, as described above, and switch to the Rebus Review group.
2. By default, Hypothesis is set to display and enter annotations. To enter a longer memo-style note, or view other notes on a particular chapter, click on **Page Notes** from the top menu.



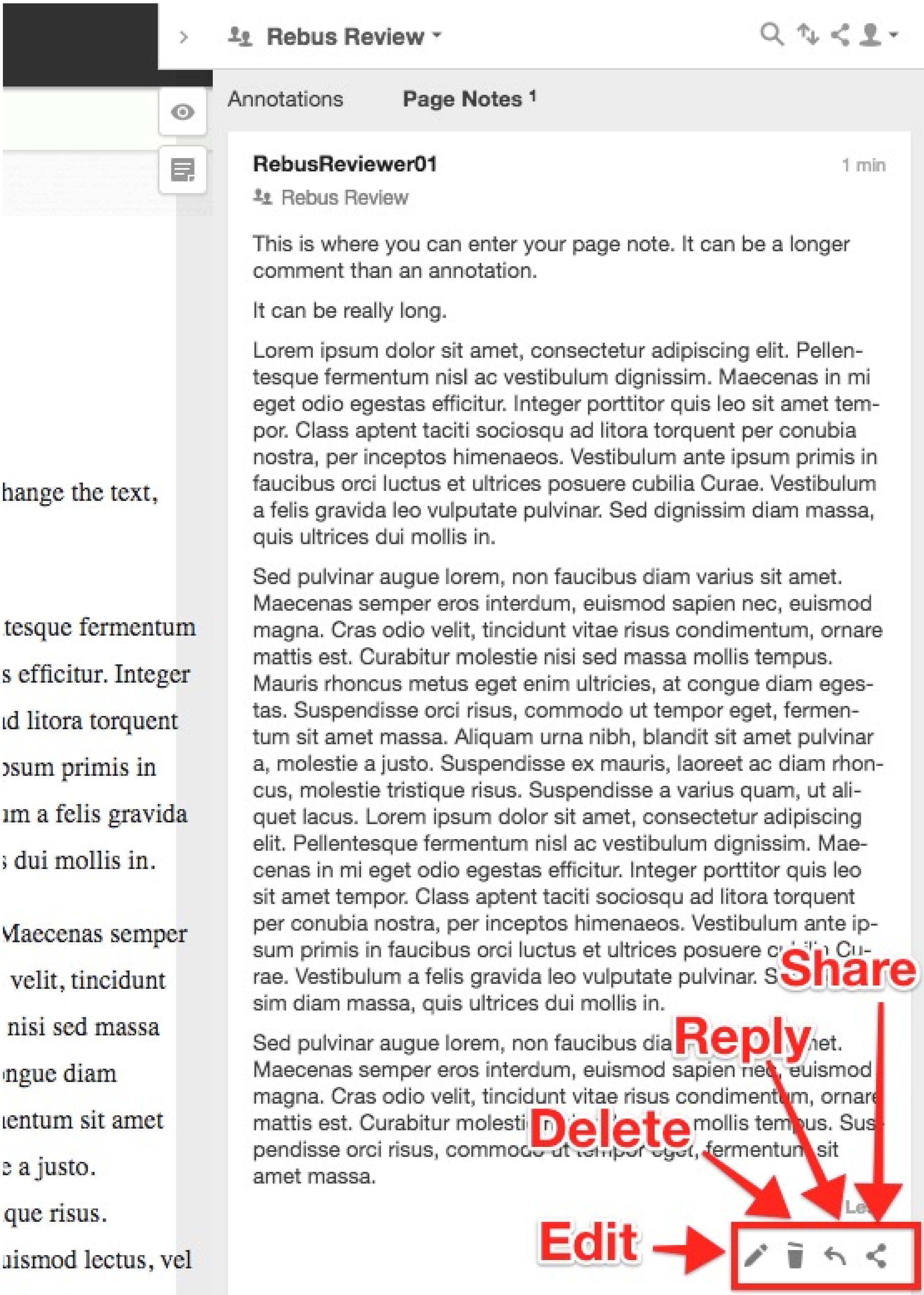
3. Click on the page icon to write your own note. You will see a comment box pop-up, where you can type in your lengthier comments.



4. Once you have finished typing, click on **Post to Rebus Review** to post your note to the group.



5. You can edit, delete, reply to, or share page notes similar to annotations!


Rebus Review
Annotations
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RebusReviewer01
1 min
Rebus Review
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It can be really long.
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Compassionate Reviewing

Here you can add a few sentences about reviewer etiquette. The following is a short example, but could be expanded on, particularly if authors will see reviewer comments – you may want to mention this specifically.

When leaving feedback, please be conscious of your language and tone and remember that the content you are critiquing is the product of many hours of concerted labour. Keep your criticism constructive, and avoid using derogatory phrases, or making personal remarks about the author. As a courtesy to the author or editor, avoid using abbreviations or short forms of words when providing feedback. Doing so ensures that your feedback remains clear and easy to understand for everyone.

If you run into any issues during this process, please contact the project lead.

Deadline

Specify the deadline for completion of review here.

Compensation

If financial compensation is available for reviewers upon completion of the review, you can mention so here.

Recognition for Reviewers

If you plan to credit reviewers in a review statement, or elsewhere in the book, make a note of it here.

References

Review rubric. Open Textbook Library. (n.d.). https://open.umn.edu/opentextbooks/reviews/rubric

Bates, T. (2015, June 25). Guidelines for reviewing an open textbook. https://www.tonybates.ca/2015/06/24/guidelines-for-reviewing-an-open-textbook/

5.4: REVIEW STATEMENT TEMPLATE

This template may be used as you've concluded peer review on your project. Find an editable version here.

[*Book Title*] was produced with support from the Rebus Community, a non-profit organisation building a new, collaborative model for publishing open textbooks. Critical to the success of this approach is including mechanisms to ensure that open textbooks produced with the Community are high quality, and meet the needs of all students who will one day use them. Rebus books undergo both peer review from faculty subject matter experts and beta testing in classrooms, where student and instructor feedback is collected.

This book has been peer reviewed by [*insert number*] subject experts from [*insert number*] higher education institutions. [*Each chapter/The full-text/etc.*] received a [*single-blind/double-blind/open*] review from [*one/two/etc.*] reviewer, based on their area of expertise. The reviewers were largely [*academics/professionals/institutional staff*] with required specialist knowledge in [*specify concepts, topics, or fields in your discipline*].

Reviews were structured around considerations of the intended audience of the book, and examined the comprehensiveness, accuracy, and relevance of content. Reviews were also focused on relevance longevity, clarity, consistency, organization structure flow, grammatical errors, and cultural relevance. See the review guide [*please link to the appropriate review guide used for your project*] for more details. Changes suggested by the reviewers covered mainly [*specify areas here*] and were incorporated by [*describe how changes were made*].

[*List names of author(s), project manager(s), review coordinator(s)*] and the team at Rebus would like to thank the review team for the time, care and commitment they contributed to the project. We recognise that peer reviewing is a generous act of service on their part. This book would not be the robust, valuable resource that it is were it not for their feedback and input.

Reviewers included:

- [*list reviewers and affiliated institutions, if review was not anonymous*]

PART 6: FORMATTING & RELEASE PREPARATION

Part 6 includes:

- Formatting & Release Preparation Summary
- Formatting & Release Preparation Overview
    - Formatting content
    - Preparing for release
- Release Planning Template
- [Example] Proposed Formatting Workflow
- [Example] Formatting Accessible Tables

6.1: FORMATTING & RELEASE PREPARATION SUMMARY

The "Big Release" is one of the most gratifying phases of the OER creation process. – it's one where your project really begins to take shape as a whole, usable resource and team members see their hard work culminating as you get ready to release your OER!

To make the most of it, a coordinated effort allows the word to get out and the resource to get into people's hands. However large your audience, it's important to take your time with these final steps, to make sure the book is in the best possible shape for release.

Underlying principles

Estimate targets, but stay flexible. Plan to have your OER released one to three months before the academic term in which you'd like to use it. Set a date during the scoping or content creation phase, but remember to revisit and adjust your timeline if and when things change.

Revisit your initial goals and measures of success. Make sure that the resource meets the objectives you set out early on, in terms of both content and formats.

Preparation and planning makes everything easier. Working to build a community of potential adopters and meet accessibility standards at every stage of the process means you will not be rushing to do so during the final weeks before release.

Have fun along the way. Release isn't all checklists and spreadsheets—it also includes elements like designing an attractive cover, writing stories about your experience making the book, and highlighting the impact the book can have, all with a great group of collaborators!

Who's Involved?

Almost everyone on the team will have a part to play leading up to the OER's release. Note that teams come in all shapes and sizes, so the following roles may not always be so distinct:

- Project manager: keeps everything on schedule, coordinates with the team, conducts final checks on the resource, creates adoption forms and tracking sheets, notifies the community about the release
- Technical lead: converts content into accessible formats for readers (minimum: web, editable, and offline formats), does content layout and styling, adds front and back matter
- Accessibility reviewer: reviews the formatted resource to ensure that formats meet accessibility standards, meets with instructional designers to make sure the book meets all learners' needs (including those with recognized disabilities)
- Proofreader: conducts final check after formatting, to catch any small errors
- Designer: creates an engaging ebook and print cover (which may also be openly licensed), makes other marketing collateral as needed (e.g., pamphlets, slide decks, videos)
- Marketing team: updates the OER description, prepares a release announcement, collects blurbs about the book to feature on the cover or in communications, creates promotion plan
- Other team members: helps with final checks, submits the OER to repositories, sets up print on demand, and spreads the word

Key Tactics

Once content is finalized, you can start working on some of these processes:

- Plan your formatting workflow with your team, based on assigned roles, institutional capacity, and external resources/ collaborators available.
- Determine the output formats for your OER and appropriate considerations (i.e. metadata, cover design, front and back matter, etc.) in learning design to ensure equal access to the content for your audience.
- Prepare all members in your team to fulfill their responsibilities regarding formatting and release duties (i.e. manage time, learn technology, build institutional capacity, create promotional materials, do final checks, etc.)
- Create an adoption form and encourage users to self-report adoptions, and use this

information to prove the book's impact.

- Follow accessibility checklists provided by your university or regional boards and prepare an accessibility assessment that shows your book meets these standards.
- Expand and build on existing promotional storywork to support the eventual release of your OER

Release is just one of the many débuts that your OER will have. After you send it into the world, it will be used, expanded, and adapted in many other ways. So this phase of the process is about having confidence that the resource is ready to be shared, while also being ready for it to be taken on (and maybe released anew) by the communities of practice that form around it. Then, as it becomes part of the disciplinary landscape, start thinking about a long-term vision, including ancillaries, new versions, and/ or remixes.

6.2: FORMATTING & RELEASE PREPARATION OVERVIEW

After the work of scoping, creating, editing, and review is done, it is finally time to share your OER with the world! As with the other phases of open publishing, spending time to plan in advance will let you immerse yourselves in the celebrations when you finally arrive at this milestone.

This section of *The Rebus Guide to Publishing Open Textbooks (So Far)* takes a deep dive into what's needed to format and launch your OER. Making your OER public requires a coordinated effort, much like the rest of the publishing process. In what follows, we summarize the final tasks that link the creation phases of publishing with those in which you get the word out and the resource into people's hands. We cover formatting and layout, cover design, final proofs, print-on-demand, and other final tasks to plan for before you announce your resource.

Formatting Content

Formatting is the process of converting your content from a word processing file into the format that will be consumed by readers. It's about ensuring that the features of the resource are functional and the aesthetic is professional and engaging. In the case of OER, content should be made available in a wide variety of formats, including web, offline, and editable formats. While Creative Commons licenses *permit* a range of uses, actual technical openness is vital to ensure that those uses are in fact possible (e.g., consider the difference between an openly licensed text available solely as a PDF versus one available in PDF, on the web, and in a downloadable, editable format).

Regardless of the book formatting software that you are using, it's important that you create, at a minimum, **one web-based format**, **one offline**, and **one editable format** of your open textbook. There are many ways in which you can meet this standard, but one of the easiest and most popular in the OER world is to use Pressbooks, an open-source book production software. (In the interest of transparency: As a paying client of the software, we love Pressbooks for how functional and useful it is. We also share a co-founder!) With Pressbooks, you are able to produce professional, platform-agnostic outputs of books in multiple formats. These include: web, PDF (print and digital), EPUB, MOBI, ODT, XML, WXR, and XHTML.

Formatting also includes styling your text, images, tables, and any other parts of your content. Overall it is about **structuring and presenting your content so that it can be used and understood by readers in the**

best possible way. To ensure consistency throughout the resource, we recommend making an inventory of the different types of content you want to have (i.e., learning objectives, case studies, summaries, key takeaways, or other recurring sections in each unit). The simplest way to do this is to provide your editors and proofreaders with a sample chapter & style guide that serves as an ideal model. Not only will this help you create an overall look and feel that is coherent throughout the book, you will also be able to ensure that all types of content are styled and structured the same way, which will ultimately guide and support learners through the book.

The formatting process is about giving your team a common frame of reference for what the formatting across chapters should be. It is often worth the extra time and effort to get organized and clear on the process, and examples can be a good start to help your team determine your own specific workflow. This proposed formatting workflow template will help you see the general trajectory of the formatting process. Though presented within the context of Pressbooks, the general steps laid out here can apply to formatting within any other publishing platform as well.

As with other stages of the OER publishing process, **collaboration** is key. Collaborate both with your team and any resources you have available to you on campus. If you have the bandwidth and have not yet done so, this is another opportunity to talk with instructional designers & accessibility practitioners/reviewers so that you're addressing any major issues or concerns while formatting. The goal here is to help your resource meet objectives, and lower the amount of remediation it needs after publication.

Both accessibility professionals and instructional designers can help you refine the usability and clarity of your resource, particularly as it relates to the format and structure. No question is too big or small – so ask about what's on your mind and you'll be surprised at how much this dialogue can help resolve problems/challenges around formatting. This means, among other things, ensuring that headings are styled for contrast, size, hierarchy, etc., so as to make them both legible and comprehensible for all readers. Similarly, images need to contain alt text, which acts as a machine-readable placeholder when the image itself cannot be viewed. These are small points, but important to think about during formatting, so as to reduce any remediative work that might need to happen after your book is released. For more information about accessibility best practices when creating your open textbook, we highly recommend the *BCcampus Open Education Accessibility Toolkit.*

Cover design

Some people may think that open textbooks don't require book covers, because they are simply 'digital texts.' In fact, covers are an important way to give your OER a face and visually engage potential readers and adopters! What's more, open textbooks can be printed, just like any other book, and it's nice to offer more than just plain text on a plain background.

Book covers also help to attract potential adopters by conveying the book's subject matter and overarching themes. For students and readers who will interact with the book, the cover **distinguishes it from other resources**, and allows it to show its 'personality' up front. While the possibilities are endless, we suggest keeping book covers simple, and dedicating a reasonable but not excessive time to creating the design. Enlisting the help of a student designer or another volunteer who is looking to grow their portfolio can be a good approach, but make sure to give them a clear briefing on what is wanted, as well as a specific timeline and set of deliverables.

As well, put a clear feedback and decision-making process in place, so that the cover doesn't end up getting stuck in 'design-by-committee' delays. When it comes to visual and textual elements, you may want to use open- source fonts and open-license photographs, so that your book cover can also be openly licensed. Public domain image repositories, and open license platforms such as Unsplash can be great resources. Let us know in the Rebus Community forum about your own go-to image and graphic sources – we'd love to share them!

Front and back matter

Adding front and back matter to your book is a good way to include information that complements or supports the main content, without necessarily being central. It can also help round out the appearance of your book and lend it some of that professionally created appeal. Front matter really sets the tone of the book and offers a lot of introductory information to a potential adopter or reader. This is their first point of contact with your work, and what they will skim through before reaching the main content. This section of your OER may help someone make a decision about whether the OER is right for them and their use-case. Back matter, on the other hand, provides supplemental features that support readers and provide additional context for potential adopters or adapters who may be remixing your resource. The table below contains a list of common front matter and back matter elements that you can choose to include in your book.

Front matter	Back matter
Abstract	About the Team
Acknowledgements	About the Publisher
Copyright Page	Accessibility Assessment
Dedication	Adoption Form
Epigraph	Afterword
Foreword	Appendix
Image Credits	Author's / Editor's Note
Introduction	Bibliography

List of Abbreviations	Conclusion
List of Illustrations	Epilogue
List of Tables	Errata
Other Books by the Author(s)/ In this Series	Glossary
Praise for this Book	Index
Preface	Licensing and Remixing Information
Prologue	Review Statement
Recommended Citation	Suggested Reading
	Versioning History

Print-on-demand (POD)

Even if your OER has been born web-based, there's something to be said about the power of print. Print remains an important option for students, many of whom still prefer to engage with content in a physical format. There are also readers who will opt for print, given that digital and online versions necessitate reliable access to digital devices and an internet connection. Print-on-demand is therefore a good way to support accessibility and choice for students, even if you yourself don't plan to use a print book in teaching.

Giving your resource a physical presence can also be invaluable for how it is perceived. Some adopters will still prefer to see a printed copy of an OER book: that materiality can make it all-the-more "real" in their perception.

If you're using Pressbooks, you can easily export a print PDF file that is optimized for printing. If you're using other formatting tools, you should check the specifications and requirements by the print-on-demand service that you plan to use. Some common providers are Lulu, IngramSpark, CreateSpace, and Kindle Direct Publishing.You may also want to look into the printing options at your campus bookstore, or with local printers in your area, as their rates might be more favourable. For more information, check out the Print-on-Demand Guide that BCcampus has created that outlines how to set up POD in detail.

Accessibility assessment

With open publishing, creators are able to take enough time to ensure their resource is accessible and usable by all students and readers from the moment of release. This means planning for accessibility and inclusive design from the very beginning, and executing that plan during the subsequent phases. Then, prior to release, a final check of the resource, across the various formats you produce, ensures that the original goals have been met. We recommend running through an accessibility checklist to determine how your book holds up to these standards. We find this checklist from BCcampus to be a helpful starting point, but you can also use checklists or standards provided by your institution, state, or national governing body.

Once you've completed this work, it's important to then include the assessment in the back matter of your OER, so that potential users can determine the suitability of the book for all students. There's also value in surfacing this kind of information for those who may not think of it otherwise, so be transparent and forthcoming with the work you've put in, as well as with any known shortfalls.

Preparing for Release

Once you've completed the steps above, the only thing left to do is to execute your promotional plan and shout it from the rooftops. As this happens, build in some time for you and your team to celebrate the moment, and pat yourselves on the back for this incredible achievement. **Creating an OER is no easy feat, but you've done it!** Take it all in, and enjoy the calm, before thinking about any next steps.

You may be wondering why you can't just wrap up this process by using the OER you've created in your classrooms and calling it a day. We encourage you to think back to your reasons for wanting to publish openly. The ease of customization of OER is a big benefit, especially when compared to publishing more traditionally. Think also to the challenges you faced when looking for OER to remix — you had specific needs that were not met (hence the work on your projects). Remember the motivators and measures for success you have highlighted in the project scoping phase, and those motivating the work as part of this grant — more adoptions and improving student experiences is at the heart.

Releasing your OER increases its discoverability, visibility, and potential impact – so more people can use what they need and remix it, if desired. It also strengthens two-way communication pathways to improve your OER over time — so the resource can keep being relevant and valuable for students and teachers.

We find it helpful to think of this exciting stage in the form of a checklist, so you can slowly prepare yourselves as a team to reach the final milestone. You'll put final touches on the book, make sure it's visible from many spaces, and then shine the spotlight on it!

Adoption

Once an OER is "out there," it gets adopted and used in classrooms, opening the possibility up for feedback from students through a classroom review. In doing so, you can determine the impact the resource is having and also look for ways to improve and update the OER so it serves students even better!

An easy way to get notifications of new adopters and adapters is to have them fill out an adoption form. (You can take a look at our Adoption Form as an example.) Forms can be more detailed if you require additional information. Make sure that you link clearly to the form from your book, from the project's public listing page, and from the release announcement or other communications. The wider the form's reach, the higher the response rate!

Read on to the Post-Release Considerations chapter to learn more about the whys and hows of adoptions.

Final checks

Other final checks include a visual test, during which you look at the layout in each format – web, PDF, and ebook – confirming consistency and coherence from beginning to end. (Note that this is not as close a read as you would do during proofreading, but instead, it is a more macro-level verification of the layout.) When you're checking content that is web-native, it's good to confirm that external links are all working, that the information about the book on its landing page is clear and descriptive, and that there is a link to your adoption form. Licenses should also be clearly displayed, and contact information can be made available, using email links. Check also that the metadata attached to your book is updated, accurate, and comprehensive – this makes it much easier for your book to be discovered in repositories!

At this point, you may want to have your book proofread (or proofread a second time if you have already done one pass). Someone with fresh eyes can catch little errors that might have been introduced during formatting, or new (minor) edits that you make to the content as you go through all these last checks. Remember, however, that when you're so close to a resource, it may never seem perfect to you, so draw a line (and set a time limit) when it comes to ongoing tweaks and adjustments. Or, if you prefer, start up plans for a second edition, and feed this work into the next project!

Submit your OER to repositories

To encourage adoptions or adaptations of your OER, it's crucial that you make your resource easy to find in various institutional and OER repositories. Repositories serve as a key space for adopters to find your OER. This is a key step in the process because you don't want your release announcement to be the only place where people can find your OER – can you recall how many release announcements you found when you were looking for OER to remix? The answer is probably very few!

By submitting your book in multiple repositories, it increases the chances that your book will be discovered by educators and researchers looking for openly licensed content in your field. We recommend submitting to major OER repositories/referotories such as MERLOT, Open Textbook library, BCcampus Library, and OER Commons, in addition to your institutional repository, or other local or national repositories in your region.

Update & involve your community

Be sure to send a notification to your community regarding the release, and if possible, send a token of appreciation to anyone who has had a particularly significant role in the development. This could be as simple as a handwritten thank you card, and/or a print copy of the resource. Many people helped create it, after all, and it's generally a small cost in exchange for a lot of goodwill (and another potential adopter!). We also think that the team and purpose behind the OER should be a guiding pillar in how you frame and tell your OER's story during release. The work of creating OER as you know is shared amongst the team — it's not the effort of just one individual. Let others know who the authors, editors, reviews, and more are. In your OER's acknowledgements, it's a nice gesture of gratitude to include a list of all the team members involved in the project, and those who have been part of its broader community. Knowing who is behind this story humanizes the work, and legitmizes it too!

If you've been sharing updates about how your project is going, there will likely also be a certain amount of anticipation and enthusiasm about the impending release, which you can tap into in a number of ways. For instance, as you're letting people know that the OER is close to release, take the chance to ask people to share some feedback (a short review, a statement of endorsement, etc.) on the book and/or process. You can use their words in your promotional assets, and follow any recommendations they have about where to share the book (e.g., listservs you might not know about).

Telling your OER's story through promotional assets

So how do you tell others about the decisions that have informed your story and the OER that you've produced? When it comes to promotional assets – you're really building on the work you started when you articulated the story of your OER in your Storytelling & Communications template and using these pieces to communicate your OER release.

Start by highlighting the unique features in your OER content — this should be one of the key themes in your story! What makes your approach and content different from other books on the same subject? Is there more regional content, real-world applications, new approaches? Are you using inclusive language, identity terms, or bringing in critical scholarship that hasn't been discussed before? Does the book have interactive elements, activities, ancillaries or other special pedagogical devices that were intentionally designed? Make a list and be sure to let folks know — because what may be evident to you will not be to someone who has not spent as much time on your OER.

As you can see, in order to "release your OER", you need to tell a story: of how the idea came to be, what the final product is, and why someone should be interested. At this point in the publishing process, the time has come to pull together what you already have into a central document, so that your team can conveniently add any of the missing pieces. You may want to create a detailed promotional plan, with key dates and major events, so you can add momentum over the course of the release. Remember — you have a unique perspective to bring to the OER based on your role on the team, so it is important that you play a small part in finalizing these pieces.

By coming together and collaborating on this project, you've all been able to create something that has a tremendous potential for long-term change! As other educators in your area and around the world hear about your resource, they can leverage the content and formats your team has put together to put their own spin to let this OER grow. So in your stories, highlight the adoption form and offer pathways for people using your OER to come share their stories and suggestions to strengthen it further.

With all the care and thought that has gone into creating the resource, it's only fitting to have a coordinated effort to make as much noise about the release as possible. While there is no limit to the number and kinds of assets you can create, we recommend the following as a minimum:

- a release announcement (with links to the OER)
- a short, shareable description of your OER (you likely have this already in your project scoping docs)
- blurbs or praise for the book
- a book cover or other visual elements to draw folks in (don't forget to include alt text!)
- short blurbs to share on social media channels (highlight what makes your OER valuable)

Whatever assets you prepare, be sure to share them widely – on a blog or other web page, in key listservs, at major conferences, on social media, within your team, and in the Rebus Community forum. Ask others to spread the word, too, and keep the momentum up so that your release is on the radar for a few weeks.

Start looking ahead

The process of preparing for release is pivotal: your team is finally getting to see the big picture and it's rewarding to see the resource come together! What's useful at this phase is to keep a running list of and tick off items as you complete them. The main things to keep in mind is that your book is available in web, editable, and offline formats, and that there's a short announcement that you can share on release day. It can sometimes be difficult to draw the line with final tweaks and touches on the book, so work with your team to reach a point where you are all happy.

As your resource becomes part of the disciplinary landscape, and communities of practice around the world begin to adopt and adapt it, it may be time to think about a long-term vision for your book. Do you want to create ancillary materials? Is there a series to be created, or a revised edition to be planned? Should the book be translated into different languages? Try to engage the community around you in this planning – they may become part of a future project's leadership team.

6.3: RELEASE PLANNING TEMPLATE

This template may be used as you're preparing for the release of your OER. Find an editable version here.

Release Planning: [Project Title]

Project Leads: [Name]

Overview

The following items will help you plan the formatting of your content and coordinate the release of your OER. Take notes where applicable and share the document with your team.

- ***What does your team need to do to finalise your project and get it ready for the launch?***
- ***Who will take on specific responsibilities?***
- ***What are the timelines?***

1. Guide the formatting process

Establish a workflow for your team including the provision of sample chapter, style guide.

2. Anticipated formatting timeline

Provide an approximate timeline for formatting. This doesn't have to be comprehensive, or rigid, but an indicator of dates for major milestones (frontmatter/ backmatter, book cover, formatting of text, formatting non-textual elements, meta-data, review of final version).

3. Output formats

Determine what output formats you want to create for your students and adopters. What kind of infrastructure needs to be put in place for easy and possibly offline access to your content, supplementary materials, multimedia?

4. Print on demand options

Think ahead how your team will offer print versions of your OER.

5. Prepare the promotion of your OER upon release

Where will you collect your project's promotional materials? What materials do already exist? Which ones will have to be created? Who will be tasked with the creation of missing materials? Who will take on what promotion pieces after the release of your OER?

6. Anticipated promotion timeline

Provide an approximate timeline for those involved in the promotion work, including the creation of materials and the specific avenues for your storywork.

6.4: [EXAMPLE] PROPOSED FORMATTING WORKFLOW

This template may be used to define the process involved when transferring draft content into Pressbooks (or similar publishing tool). You can access an editable version of this example online.

Formatting Workflow in Pressbooks

- Create Pressbooks shell, and select a theme to use in the book (some themes, like Malala, are explicitly designed for textbooks).
- Prepare a formatting guide or set up a chapter template (with all elements formatted) in Pressbooks. You could also use the first chapter as an example. Include instructions on:
  - nesting of headings
  - alternative text for images
  - sensible link text
  - media attributions
  - glossary items
  - interactive elements
  - tables
  - lists
  - textboxes (learning outcomes, student tips)
  - footnotes
  - references
- Transfer a chapter into Pressbooks, using the docx Import tool or by copying and pasting from your draft document.
- Clean up content in the Text Editor (removing any <span> or <div> tags that might interfere with the default formatting from the theme).
- Check if anything has been lost in the transfer (links, heading hierarchy, lists, images, multimedia, etc.).
- Format the content as outlined in the formatting guide. Save your changes.
- Preview the content in web, PDF, EPUB. Make changes until the content looks satisfactory in each of these formats.
- If necessary, adjust the Theme Options on the book.

- Repeat 3-7 for the remaining chapters in the book (bulk import if necessary).
- Then add frontmatter and backmatter elements, and repeat 5-7.
  - Frontmatter:
    - Acknowledgements
    - Dedication
    - Introduction
    - How to use the book (for students or instructors)
    - What is an open textbook
    - Praise for the book
  - Backmatter:
    - References
    - Glossary
    - Ancillaries (slides, answers to exercises/quizzes)
    - Review statement
    - Version History (including the publication date and version number of the first edition)
    - Licensing and Attribution information
    - Accessibility Assessment
    - About the Contributors
    - Feedback and Suggestions
    - Adoption Form
- Enter the metadata in the Book Information. At minimum, input the:
  - Title
  - Short and long description
  - Subject
  - License
  - Team
  - Cover
  - Rebus project homepage link (so others can contact you or the team)
- At this stage, you may want to proofread the book or conduct accessibility review or classroom review. Do what's required and make necessary revisions to your content.
- Export files in web, editable, and offline formats, and conduct final checks for every format.
- Adjust the settings to allow these formats to be downloaded from the book homepage.
- Set up print-on-demand, if possible. Include a link to purchase a print copy in the book homepage.
- Notify the team and send them a link to view the book.
- Update Rebus project homepage with a link to the book.
- Execute your marketing plan to release the book.

6.5: [EXAMPLE] FORMATTING ACCESSIBLE TABLES

This set of examples is used to illustrate common errors when formatting tables in Pressbooks, and how these can be fixed. These examples includes a information developed by *The Story of Earth: An Observational Guide* by Daniel Hauptvogel & Virginia Sisson. Our thanks to the team at Daniel Hauptvogel, Virginia Sisson, and their team.

Original Tables from "The Story of Earth"

In Table 1.1, the header cells are marked using bold formatting, instead of the scoping attribute. This makes it difficult for screen readers to process this information. Instead, we've reformatted the information in Table 1.3 to properly mark the header rows and columns.

Table 1.1 – Comparison of oceanic and continental crust.

Property	**Oceanic Crust**	**Continental Crust**
Thickness	7-10 km	25-80 km
Density	$3.0 g/cm^3$	$2.7 g/cm^3$
Silica (SiO_2) Content	50%	60%
Composition	Fe, Mg, and Ca silicates	K, Na, and Al silicates
Color	Dark	Light

In Table 1.2, the merged cells may prove difficult to read by a screen even if properly marked. So instead, reformat the table as shown in Table 1.4 and 1.5

Table 1.2 – Earthquake location data from Chile (from Martinod et al., 2010)

Chile-Peru Border		**Central Chile**	
Distance from trench (km)	**Depth (km)**	**Distance from trench (km)**	**Depth (km)**
200	30	170	40
220	50	220	65

300	65	400	90
370	125	200	50
500	190	120	20
300	100	500	110
250	65	350	85
210	40	300	75
280	80	250	60
450	175	280	75
400	140	200	55
410	150	260	90

Reformatted Tables for improved accessibility

Table 1.3 – Comparison of oceanic and continental crust.

Property	Oceanic Crust	Continental Crust
Thickness	7-10 km	25-80 km
Density	3.0g/cm^3	2.7g/cm^3
Silica (SiO_2) Content	50%	60%
Composition	Fe, Mg, and Ca silicates	K, Na, and Al silicates
Color	Dark	Light

Table 1.4 – Earthquake location data from Chile-Peru Border (from Martinod et al., 2010)

Distance from trench (km)	Depth (km)
200	30
220	50
300	65
370	125
500	190

Table 1.5 – Earthquake location data from Central Chile (from Martinod et al., 2010)

Distance from trench (km)	Depth (km)
170	40
220	65
400	90
200	50
120	20
500	110

300	100
250	65
210	40
280	80
450	175
400	140
410	150

350	85
300	75
250	60
280	75
200	55
260	90

PART 7: POST-RELEASE & ADOPTIONS

Part 7 includes:

- Post-Release & Adoptions Summary
- Post-Release & Adoptions Overview
    - OER Improvements & Maintenance
    - Adoptions & Measuring Impact

7.1: POST-RELEASE & ADOPTIONS SUMMARY

Every OER should have an 'afterlife' beyond its initial use — changing and evolving to ensure ongoing relevance and continued adoption. In this way, your role shifts from creation to a focus on maintenance, updates, corrections, and assessing impact.

Whether or not adoption is the explicit goal you've been working towards, the open license on your book is nonetheless an indicator that you recognize that others can benefit from your book. It's therefore worth putting in some effort to encourage and track adoptions.

Underlying principles

Spread the word far and wide. The larger the group of people who know about your OER and the impacts it has had in classrooms, the greater the likelihood of more adoptions.

Recognize the implications of the open license. The openness of OER means a lot for students and instructors, including access and use with few or no barriers. At the same time, openness can make it hard to keep track of who's using the book.

Be responsive to grow the community of practice. Act on adopter and student feedback, and put adopters in touch with each other and the rest of the project team. Remain attentive to ways in which adopters can help expand and update the text. Corrections, updates, and additions can also be based on wider shifts in the resource's discipline or subject area.

Be public about in-progress and completed updates. Anyone invested in the resource will be motivated to keep it up to date; informing them about expected improvements can prompt them to help or simply look forward to the update.

Be transparent and consensual about the data you're collecting. State explicitly what information you're asking for and how it may be used. Follow the guidelines in your region, so that adopters are comfortable and informed when submitting their details.

Parse, process, and plan before you do. Prioritize which tasks need completing first, based on the resources at hand and the complexity of the tasks. Use the scale of changes to determine timelines and the release of new versions and editions.

Be flexible! Adopters might not follow your preferred methods of reporting, but it's still a win if they're using the book and letting you know!

Who's Involved?

The possibilities of improvements, spinoffs, and adaptations are endless, but they don't all need to be done by you. Remember, the community around your book will grow with time, with many nodes branching off from each team member:

- Project managers: sets up Adoption Forms, submits reports about the OER's impact, communicates with the group of adopters, makes connections between new and current collaborators, oversees projects through to completion
- Authors: connects with potential adopters, can be adopters themselves, revises content based on feedback from adopters and students, records them in the Version History
- Editors: connects with potential adopters, reviews feedback from adopters and students, decides which changes are immediate and which should wait for newer versions or editions of the OER, prioritizes work for future versions or editions, implements changes and records them in the Version History
- Students: provides feedback about the book after using it in their classroom
- New Adopters: uses the OER in their classroom, joins the community around the resource, participate in revising or expanding the OER

Key Tactics

The release and adoption of your OER are big milestones worth celebrating, but they also mark the beginning of a new set of steps, including the following:

- Document the desired impact of your OER upon release in all areas including student success, institutional capacity, transformation in your discipline, personal change, adoptions, etc.
- Engage a community of practice of adopters and students around your OER. Set up clear communication pathways from the book and ancillaries, so new collaborators can reach out.
- Create a clear and simple Adoption Form and ensure there are clear ways for adopters to find the form.
- Assess the scale and urgency of improvements needed following the resource's initial release and establish a process around maintaining and updating published OER.
- Propose a workflow to collect information on your OER's efficacy, as you observe how your OER is having an impact to advance student success, pedagogy, or other institutional Open Education goals at your campus and beyond.
- Always keep everyone informed about ongoing work and estimated timeframes for completion.

Your OER will continue to change and evolve as it is a living document and so will your role as creator. Your efforts following the OER release will slowly shift to maintenance, updates, corrections, and assessing the impact of the resource.

Read on to learn more about post-release considerations.

7.2: POST-RELEASE & ADOPTIONS OVERVIEW

Congratulations — you've released your OER and that is no easy feat! We hope you and your teams have been able to celebrate the impressive process of creating (or remixing) an OER.

You've also made it to the final stage of the publishing process! As shown in the image below, if you were to continue along the cycle, you'll end up in Project Scoping, which is where you started your journey. The Adoptions and Post-release phase is an exciting one — continuing on from the celebrations of release planning — as you determine how your OER is being used, what impact it is having, and how to share this more widely. This insight can sometimes act as a spark for ways to revise, update, or improve your OER, which you can scope and continue to work on as the cycle indicates.

Fig 7.1: An overview of the Rebus publishing process.

Once your OER is released, it's understandable that you would want to savour the moment, to enjoy the resource's existence in the world and to celebrate having completed a huge piece of work! Nonetheless, while the bulk of your efforts are complete, it's important to remember that maintaining the book is important — to ensure its ongoing relevance and continued adoption.

This leads to one of the biggest questions that often gets missed in the publishing process: what is the workflow to enrich future versions of your resource?

This part of *The Rebus Guide to Publishing Open Textbooks (So Far)* will take you through your OER's journey following its Big Release — what happens when it is used in the classroom? How do you keep it up-to-date so it stays relevant going forward? There are many possibilities for adaptation and growth that your OER allows and this will feed back into the community around the resource.

OER Improvements & Maintenance

We like to think of OER as living documents, which only tend to change and evolve over time in order to better respond to the needs of you and others who are using it. In creating OER, we hold a shared responsibility to make sure we are responsive to feedback, mindful of further accessibility improvements needed, paying attention to changes needed based on evolving conversations in the discipline and more. It's important for educational materials to stay current — be it in terms of form or content!

Maintaining an OER doesn't need to be a complicated matter. As we see it, maintenance includes ongoing changes that are more about function than content, made at any point, during the academic year. This entails keeping tabs on the book with an eye to grammatical errors, typos, or broken links. You may also choose to track and respond to any error reports that readers and adopters of the book have submitted (including thanking them for their keen eyes, and perhaps asking if they want to get involved with other improvements!)

OER, regardless of whether they are web-based or printed, need some amount of editorial attention to remain valuable resources. If your resource is hosted on the web, part of the maintenance process should involve ensuring that it is still accessible in its web format along with other offline and editable formats. And to ensure maximum distribution, find out if any new OER repositories have been created since the book's initial release, and then make sure you submit it for inclusion there.

A resource that is not improved, updated, and maintained can be perceived as being 'too old' and 'out-of-date' very quickly and therefore not seriously considered as an option by educators seeking course materials. In a way, a book's usefulness can depend on the amount of attention that it receives – as people see news of updates, changes, or improvements to the book, they will be more likely to peruse the book and use it in their course!

Further down, we get into more detail about the timing, order, and significance of different types of maintenance revisions.

Timing and process

Depending on the extent of improvements, additions, and updates to be made, they will need to be carried out at different times after release. A major concern, therefore, is the impact that making changes during the school year will have on students and teachers who are using the OER in their courses. This includes the changes made to different formats of the resource too, as students will be accessing the OER in a variety of ways (on the web, in other digital formats like EPUB, PDF, MOBI, and as printed copies).

The upshot is that small-scale "maintenance" changes (correcting typos, broken links, etc.) are the only type of revisions we advise making during the academic year, ideally to the web-based version of the resource only. Changes to the print version and other formats may need to wait for a pause in the academic year or until year-end, depending on how the in- school time is organized in your region — this is mainly to avoid students from having to purchase or set up multiple versions of the resource during a single course. Each maintenance change does not need to be marked as a new edition of the OER, nor does it necessarily require comprehensive tracking in the Version History. We do recommend, however, that error reports and corrections be listed publicly, so readers can see what those changes are and note them in their teaching and learning contexts, as well as avoid submitting duplicate error reports. Take a look at some example errata lists from OpenStax, along with examples of how to share these lists in printed PDF formats, and some inspirations for the errata form itself.

For larger improvements and updates, we suggest that you first parse and process the extent of the changes needed, and then plan out a timeline to do so. Some changes may be easier or harder to implement, or require less or more participation from the team. As you're deciding on your tasks and timeline, also think through who will make these changes and assign the right people to them. The scale of changes, from classroom feedback to significant additions planned by the team, will determine whether a new edition or a new version of the book will need to be released (more on this below). The important thing is to be responsive to adopters, readers, and other scholars, and clearly surface the changes that you are making to the text in the version history.

When significant changes have been made and there is a new version or edition of your resource, inform all of its known adopters before replacing the old format of the OER. And if possible, inform everyone of the specific updates, additions, corrections that have been made— either by pointing to the Version History, or to a list of improvements (if it is a new edition). See an example of this in *Media Innovation and Entrepreneurship*.

Larger changes can consist of:

- qualitative improvements to existing content
- quantitative additions to existing content
- disciplinary or thematic updates

Following adoption of the OER in classrooms, you are bound to receive different forms of constructive feedback regarding the content. For instance, you may have been told that a particular unit has proven to be very difficult for students to understand, or that specific elements like case studies, exercises, or references are not as clear as they should be.

These constitute opportunities for improving those parts of the resource, which should be done during this phase in the OER's life-cycle. Improvements can also be implemented based on feedback from reviewers—those issues that were not addressed during the initial creation of the resource. It's also critical in this phase to revisit and resolve outstanding accessibility issues, as well as new ones that have been identified as the OER has been used.

During this stage, you can also make additions to the content. These may include elements that were initially planned for inclusion but didn't make it into the first release, suggestions from reviewers, proposals from adopters, and ideas you and your team came up with post-release. Additions can also come in the form of ancillary materials, like slide decks, question banks, exercises, and other supplementary content.

The last category of revisions are those that become relevant due to changes within the OER's discipline or subject area, or in response to real-world changes that provide new or improved examples of theoretical concepts. These types of revisions highlight how OER can be responsive to wider changes in theory, discourse, and practice. For this part of the process, pay attention to these larger themes, including examples, case studies, language and terminology, methodologies that are cited, resource lists, and literature reviews.

All of these changes should be included in the resource's **Version History**, which serves as a record of the various changes, edits, additions, and updates that are made over time. Take a look at our version history template and adapt it as needed for your book. This form doesn't need to be overly complicated at all – the purpose of this backmatter section is to inform current and potential adopters about how your OER has evolved over time.

Editions and versions

The differences between a new version of a textbook and a new edition of a textbook bear clarification. As we think of it, a new version contains only minor changes – maintenance and smaller-scale improvements to the existing content. A new *edition* of the book incorporates major changes to content, such as additions and updates to the original release.

New versions of an OER are usually indicated by point increments (e.g., 1.1, 1.2, 1.3, ...), while new editions are indicated by whole number increases (e.g., 1st edition, 2nd edition, 3rd edition, ...) The release of a new edition is a time to rally more attention within and beyond your community, and perhaps some promotional efforts as well. If this is the case, do so strategically, and only if the revisions merit it. If there have only been subtle changes and updates, it may not warrant extensive promotion.

Releases of new editions can sometimes be disruptive, especially if they happen frequently (every year, for instance), as students might be working with older physical copies of the book that are more easily available and/ or affordable. While one of the many advantages of publishing openly is the flexibility and ease of making changes, it is still important to be considerate towards ongoing users of the book, bearing in mind the impact that changes will have on them.

If you are working on a new edition of your OER, be public about it, and communicate in advance with your team and adopters about the expected changes and updates. Doing so lets them know what is coming, and may even motivate some people to help you make these improvements. Once the changes have been completed, reach out and update everyone, pointing to the new edition and Version History that clearly outlines updates you have made.

Who makes these changes?

As we've seen so far, there's a lot that you can do to maintain and improve on your already carefully crafted open textbook! The main thing to keep in mind is that all these improvements do not need to be made by you alone. In fact, it probably won't and can't all be done by you – and that's a good thing. Part of what makes creating OER important is the community building that goes hand in hand. This doesn't stop with the OER's release, but continues during improvements and maintenance. Keep gathering people around the book during this phase, from adopters to adapters, so that both the book and the community can grow with time!

The first source of help for maintenance and improvements is the team and collaborators who were involved in creating the resource. Reach out to them as needs arise, and you may be surprised at their response! You can also reach out to the people who are using the OER – adopters may well be very motivated to help make changes, as they are the ones who directly benefit from improvements to the book.

Simply put, any individual, institution, or organization invested in the value of the resource has an incentive to contribute to maintaining it and keeping it up- to-date in the long term. Depending on the type of project or work that is being done to improve or add to the book, you may even find funders willing to invest financially, or others who can secure budgets through institutional, local, or state grants.

For this to happen, it is vital that you have clear communications pathways set up from your book and its ancillaries. That way, anyone who is interested in contributing in some way knows how to contact you or another team member. And if you find that you need to step away from the project at some point, make sure you've identified and involved someone else to take over or manage things in the interim. Look to your leadership team for this, because there will likely be someone who is eager and willing to take on the mantle.

And lastly, do what you can to be public about the status of the OER, of other projects, and of changes, even if it's in the form of a short notice in the book or in your team's public discussion space. Leave the possibilities for the book open – and watch eagerly how they unfurl!

Your OER can live on

So far, we've only addressed updates and improvements to the core OER, but there are other ways in which you may like to expand on your OER. Ancillary materials like slide decks, question banks, instructor manuals, and student workbooks can supplement your resource and make it a more appealing package for adopters. You can begin work on these projects following the book's release, or if you have the resources to do so, concurrent to the OER's production!

With the open license on your book, the different types of spinoffs are endless. For instance, translations, spelling conversions (eg.: American to British spelling), or cultural adjustments can make it accessible for use in more regions. Other adaptations, small or large, can make the text work better in different pedagogical contexts, or incorporate regionally specific content that makes it relevant to a different set of users, thus expanding the pool of readers around your book.

While adaptations mostly maintain consistency of the content, other variants like **remixing** can involve blending content from the book with other openly licensed content. For example, *Blueprint for Success in College and Career* remixes sections from four other OER: *Foundations of Academic Success, A Different Road to College: A Guide for Transitioning Non-traditional Students, How to Learn Like a Pro!*, and *College Success.*

Other ways to build on your OER is to think of new formats and media through which to share content. You could create an audiobook version of the text, a series of short videos summarizing each unit, or a poster series that creates visualizations of the content. The possibilities are endless – this is just the beginning for your OER and its impact!

Adoptions & Measuring Impact

From having your OER used in a single section of a single course to seeing an entire university department incorporate it into all their classes, "adoption" can mean a variety of things. In our framing, having a resource adopted generally means that it has been assigned, either in part or in full, as part of the materials for a given course.

In any case, adoption is often the moment that you've been working for — seeing the resource put to use so it can advance learning in some way. Even if you embarked on this project simply to create a resource for your own class or course, the fact that you decided to apply an open license to the book means that you've already been thinking of other educators and students that might benefit from your work in the long run. So, as you reach the point of releasing your book, it's worth it to put in a bit of effort to encourage and track adoptions.

Community of practice

Everyone and anyone who is using the OER, who benefits from this content being openly licensed, is an asset. Really, what adopters signify is an expansion of your project team — a set of people who are working closely with your OER! They can offer feedback and input on the resource, and we suggest that you think of engaging this group as a **community of practice**.

By connecting with adopters, you can create more opportunities to gather feedback, new contributions, ideas, updates, spinoffs, ancillaries and more, and it all comes from people who are just as invested as you are in the book being maintained and improved in the long term. Each time the book is adopted, the community around it becomes larger. Making sure you can find those adopters (and they can find you!) can make all the difference in keeping a book alive over time.

You can create a mailing list comprising all the adopters of a book (to share comments, teaching tips, additional resources, and more). You can of course leverage the Rebus forum discussion space for the same purpose, or even conduct a series of regular calls with your adopters. Staying in touch with this group can help you learn more about the impact your OER is having — so it's definitely worth taking a moment to consider how you might want to identify and engage your community of practice.

Tracking adoptions & measuring impact

As we think of the potential of OER to connect individuals, it's also worth noting that broader adoptions of your OER demonstrate impact to institutions and administrators in a significant way. Adoptions are an especially important indicator of the value and impact of the resource you've created. Given the amount of time and effort you and your collaborators have put into it, seeing your book going out into the world can be incredibly validating – it's **a vote of confidence from the adopter about the content and quality of your book and the purpose driving the creation of the OER.** Adoptions can be the start of a ripple effect — someone's first foray into open education could begin with using your OER in their classroom and lead them on their own journey.

Adoption forms

As discussed in other sections of the *Guide*, a major portion of setting up feedback and reporting channels for adoption takes place during the release preparation. Even so, you can also start thinking about adoptions as early as content creation, editing, and review. Along the way to release, you have hopefully collected a list of people (and their email addresses!) who are interested in the OER and have shown signs of wanting to adopt it when it is ready.

Adoption forms are one of the most popular ways to collect information on how your resource is being used. Check out our Adoption Form as an example of what this form can look like (it can be modified to include more or less detail as needed). The best way to track adoptions is to ask users to self-report via the adoption form, so make sure this form is visible clearly from the OER's home page, and that it is also in any major communications about the OER, like the official announcement. Lastly, make sure to include clear pathways for communication, so adopters know how to contact you or other folks who are using the book. This can be as simple as a link to the Rebus Community forum, your email address, or other contact information.

We've found that it's best to start with a simple form, so that those responding aren't too overwhelmed. As you get more comfortable with the group of adopters over time, you can also ask them to provide more information about how the book is being used, building on the initial questions in your Adoption Form. Find the right balance between the full information you would like to have down the line and those details that you absolutely need up front.

> In the spirit of transparent and consensual data collection, it's also important to be clear and explicit about the reasons you are collecting certain information. If possible, also tell them what you will be doing with it. For instance, if you're using the OER in your course, you might want to get in touch with the folks on your campus who monitor information like student retention or withdrawal rates, and ask other adopters to do the same. With that kind of information collected, you can build the case for the relevance of your course, for a departmental adoption of your book, and for the increased use of OER. Telling your adopters the impact of the information that they share can help incentivize them to submit data and feel more comfortable doing so.

Another suggestion is to keep an eye out for broader OER tracking projects, like SPARC's initiative to report USD $1 billion in student savings, and see what information might be required for these projects. Accordingly, update your own Adoption form or follow-up questions that you routinely send new adopters. You might also look at repositories that ask for adoption information, to either expand your form or find out if any adoptions of your book have been reported. For examples, see BCcampus' Adoption Form and their Open Textbook Statistics page.

Use whatever information you have available, whether it is data reported by adopters in the form, statistics from your institutional repository, statistics from other repositories, analytics from Pressbooks (or wherever your OER is hosted), etc. In so doing, however, don't forget to also listen to adopter and student feedback about the resource's content and structure. We have an entire section about improving your textbook, which includes what you can do with the feedback you receive. Ultimately, because tracking OER adoptions can't rely on the more conventional metric of unit sales, it will always be an issue of thinking creatively and paying attention to alternative forms and types of usage data.

Following the big release, keep the noise and momentum around the OER going by talking it up within your network, at conferences, and ask other members on your team and staff at your campus to do the same! Keep your resource's unique selling points in mind during these conversations, and also point to any additional items that could be packaged along with the OER (such as slide decks, question banks, instructor workbooks, or other ancillaries) to motivate and attract people to adopt your book. Remember, the larger the group of people who know about your OER, the higher the possibility of reported adoptions.

Measuring impact beyond savings

Given the care and thought to bring a student-centered and equity-based approach to OER creation, are there also ways to carry this forward to look at other measures of assessing student "success" beyond grades? For instance, do you want to know if your students are more motivated, persistent, appreciate collaboration or are more self-directed? We encourage you to to think deeply about non-traditional measures around student success. It's important to think beyond the cumulative student savings numbers we often see shared. At this point, it is worth revisiting your Measures of Success (in your Project Scoping Summary) to see whether there is other information to gather to assess whether your OER is reaching its goals! How can you dig deeper to understand the impact of your OER? One major area to gain further insight into your OER is by listening to the input of students and teachers.

There are many ways your resource may be positively changing the teaching and learning experience of students. Surveys can assess these behaviours prior to using the OER and following. Ask your adopter community to offer lots of opportunities for feedback and reflection, even if not in the form of a survey! As we noted, OER adoption is often in tandem with other open educational practices, so you may also ask your adopters to keep track of any open pedagogy assignments used in the classroom and the impact it has had on students (a memorandum of understanding can be especially useful for these kinds of assignments). You can also ask adopters to keep track of general trends pertaining to course completion/graduation, or traditional performance metrics.

You could use this period of data collection to make visible the teaching and learning that happens with the resource. See whether the adopter community would be interested in presenting about their experiences teaching with this OER, and whether this has sparked new conversations for them about open education.

As you're seeing so far, there are a myriad of ways to determine how "efficient" or "impactful" your OER is — and this tends to vary in the eyes of the beholder! Measuring impact can involve connecting with adopters, creating technical infrastructure to gather data, or communications work to share this information. This is not something that can lie with just the faculty member teaching with the OER — rather, it is a collective effort.

The information you are gathering about your OER after release is an exciting period to show the support that the community has towards the OER and to see your hard work pay off. What started out as your project team in the scoping phase turns into something larger, so we want you to do more with this data!

Sharing impact stories

So what do you do with all this information?

The data you collect about adoptions is a powerful tool to make the case for OER, as it demonstrates the direct impact on students. This helps make the case for increased institutional investment in the creation of new OER and to the maintenance and further adoption of existing resources.

Reporting can serve multiple purposes. Once you've collected feedback on your resource, it's likely that you'll use it to inform updates as we discussed earlier. But it's also vital to share back your findings with key stakeholders. The work that you've done to create and use your OER can help further the cause for making education more accessible and equitable. You can use your findings to create new calls to action (for more adoptions, new grants, etc.). You can use this as a moment to highlight the people, process, and work, foster community, or simply support contributors in advancing their careers by helping them include this project in their Tenure and Promotion dossier. This OER could encourage innovation in the field, make a case for more funding in open education in your discipline/at your institution.

The impact you report could potentially also support a broader call for change in policy/legislation — to make education more affordable, reduce the digital divide, ensure equal opportunity for all students, support fair compensation for educators, etc. This can take many forms, but what matters here is to continue the storytelling process. The work that you've done matters, so make it visible. Through adoption data and more, as discussed today, you can proudly demonstrate the benefit of collaboration, as well as the power of education to help and bring us all together!

MAKING OPEN TEXTBOOKS: A VIDEO GUIDE

If you're looking for a light overview of OER creation, check out the video series version of this guide. *Making Open Textbooks: A Video Guide* provides a brief summary of each of the major phases of creation. The short videos present the roles, models, and guidelines that make up the process of creating and publishing open textbooks. From project conception and rounding up a team of collaborators, to creating, editing, and reviewing your content, all the way through to release, marketing, adoptions, and revisions, these videos summarize the many steps along the way.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/?p=368#oembed-1

Making Open Textbooks: A Video Guide features Zoe Wake Hyde. It is edited and directed by David Szanto. Transcript and captions provided by Mei Lin.

APPENDIX: TEMPLATES

The following is a consolidated list of the templates embedded throughout this *Guide*. We hope these templates serve you well on your OER journey.

Project Summary Template

Roles & Responsibilities Template

Contributor MOU Template

Storytelling & Communications Template

Mailing List Template

OER Structure Template

Author Guide Template (with Style Sheet)

Content Tracking Template

Image Tracking Template

Review Guide Template

Review Tracking Template

Review Statement Template

Release Planning Template

Version History Template

ABOUT THE TEAM

Authors

Apurva Ashok studied literature and marketing at McGill University and completed the Master of Publishing program at Simon Fraser University. Her experience ranges across academic publishing, media, social justice, and volunteer work. In 2015, she co-founded *Harf*, a student-run journal on South Asian studies. Apurva strongly believes in translating knowledge across places and people and in the value of greater critical thinking for all.

Zoe Wake Hyde worked in media communications and academic administration in New Zealand before completing the Master of Publishing program at Simon Fraser University. Having gained an alternative view of academic publishing, she is now focused on creating value-exchange systems that support better, more democratic access to knowledge and learning.

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David Szanto has worked in a number of different professions, including book publishing, new product and service development, innovation consulting, film finance, marketing-communications, and academia.

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Jördis Weilandt is an anti-oppression educator with a background and 20 years of working experience in culture studies, modern language teaching, and educational development, who works to (un)learn and support equity in higher education and herbalism. With roots in multiple worlds, she nourishes a strong trust in the power of community and works to shift systems towards co-liberation, land-based protection, and respect (for humans as much as for the more than human kin).

FEEDBACK AND SUGGESTIONS

We are actively and enthusiastically soliciting feedback from instructors, faculty, administrators, OER program managers, librarians, instructional designers, students, and others using this book. You can leave feedback and suggestions in the Rebus Community forum at https://forum.rebus.community/c/open-textbooks-in-development/the-rebus-guide-to-publishing/226.

ACCESSIBILITY ASSESSMENT

A note from the Rebus Community

We are working to create a new, collaborative model for publishing open textbooks. Critical to our success in reaching this goal is to ensure that all books produced using that model meet the needs of all those who will one day use them. To us, open means inclusive, so for a book to be open, it must also be accessible.

As a result, we are working with accessibility experts and others in the OER community to develop best practices for creating accessible open textbooks, and are building those practices into the Rebus model of publishing. By doing this, we hope to ensure that all books produced using the Rebus Community are accessible by default, and require an absolute minimum of remediation or adaptation to meet any individual reader's needs.

While we work on developing guidelines and implementing support for authoring accessible content, we are making a good faith effort to ensure that books produced with our support meet accessibility standards wherever possible, and to highlight areas where we know there is work to do. It is our hope that by being transparent on our current books, we can begin the process of making sure that accessibility is top of mind for all authors, adopters, students, and contributors of all kinds on all our open textbook projects.

Below is a short assessment of eight key areas that have been assessed during the production process. The checklist has been drawn from the BCcampus Open Education Accessibility Toolkit. While a checklist such as this is just one part of a holistic approach to accessibility, it is one way to begin our work on embedded good accessibility practices in the books we support.

Wherever possible, we have identified ways in which anyone may contribute their expertise to improve the accessibility of this text.

We also welcome any feedback from anyone who encounters the book and identifies an issue that needs resolving. This book is an ongoing project and will be updated as needed. If you would like to submit a correction or suggestion, please do so using the Rebus Community Accessibility Suggestions form.

Accessibility Checklist

Checklist for Accessibility in Webbook

Area of Focus	**Requirements**	**Pass?**
Organizing Content	Content is organized under headings and subheadings	Yes
Organizing Content	Headings and subheadings are used sequentially (e.g. Heading 1. Heading 2, etc.) as well as logically (if the title if Heading 1 then there should be no other Heading 1 styles as the title is the uppermost level)	Yes
Images	Images that convey information include Alternative Text (alt-text) descriptions of the image's content or function	Yes
Images	Graphs, charts, and maps also include contextual or supporting details in the text surrounding the image	Yes
Images	Images do not rely on colour to convey information	Yes
Images	Images that are purely decorative contain empty alternative text descriptions. (Descriptive text is unnecessary if the image doesn't convey contextual content information)	Yes
Tables	Tables include row and column headers	Yes
Tables	Tables include a title or caption	Yes
Tables	Tables do not have merged or split cells	Yes
Tables	Tables have adequate cell padding	Yes
Weblinks	The weblink is meaningful in context, and does not use generic text such as "click here" or "read more"	Yes
Weblinks	Weblinks do not open new windows or tabs	Yes
Weblinks	If weblinks must open in a new window, a textual reference is included in the link information	Not Applicable
Embedded Multimedia	A transcript has been made available	Yes

	for a multimedia resource that includes audio narration or instruction*	
Embedded Multimedia	Captions of all speech content and relevant non-speech content are included in the multimedia resource that includes audio synchronized with a video presentation	Yes
Embedded Multimedia	Audio descriptions of contextual visuals (graphs, charts, etc.) are included in the multimedia resource	Not Applicable
Formulas	Formulas have been created using MathML	Yes
Formulas	Formulas are images with alternative text descriptions, if MathML is not an option	Not Applicable
Font Size	Font size is 12 point or higher for body text	Yes
Font Size	Font size is 9 point for footnotes or endnotes	Yes
Font Size	Font size can be zoomed to 200%	Yes

*Transcript includes:

- Speaker's name
- All speech content
- Relevant descriptions of speech
- Descriptions of relevant non-speech audio
- Headings and subheadings

LICENSING INFORMATION

Please credit us as follows:

Redistributing the book verbatim:

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VERSION HISTORY

This page provides a record of edits and changes made to this book since its initial publication. Whenever edits or updates are made in the text, we provide a record and description of those changes here. If the change is minor, the version number increases by 0.1. If the edits involve substantial updates, the edition number increases to the next whole number.

The files posted alongside this book always reflect the most recent version. If you find an error in this book, please let us know in the Rebus Community forum.

Version History

Version	**Date**	**Change**
	12 September 2022	• Updated hyperlinks to Rebus Community forum throughout the entire Guide

3.0	22 July 2022	• Title changed to "Post-Release & Adoptions"
		• Sections revised:
		  ◦ Post-Release & Adoptions Summary
		  ◦ Post-Release & Adoptions Overview
		• Sections added:
		  ◦ OER Improvement & Maintenance
		  ◦ Adoptions & Measuring Impact
		• Sections removed:
		  ◦ Improvements & Maintenance Summary
		  ◦ Adoptions Summary
		  ◦ Adaptations Summary
		  ◦ Adaptations Overview

	20 July 2022	• Title changed to "Formatting & Release Preparation"
		• Sections revised:
		  ◦ Summary
		  ◦ Overview
		• Sections added:
		  ◦ Release Planning Template

	19 July 2022	• Sections revised:

		• ◦ Summary ◦ Overview ◦ Updated Templates
	27 June 2022	• Title changed to "Creating & Editing Content" • Sections revised: ◦ Summary ◦ Overview ◦ Updated Templates • Sections added: ◦ Considerations When Creating & Editing Content
	6 June 2022	• Title changed to "Storytelling & Communications" • Storytelling & Communications part moved up • Sections revised: ◦ Summary ◦ Overview • Sections added: ◦ Storytelling & Communications Template
	10 May 2022	• Title changed to "Growing & Managing Teams" • Growing & Managing Teams sections revised: ◦ Summary ◦ Overview ◦ Building an Effective Team ◦ Roles & Responsibilities • Sections added: ◦ Effective Collaboration ◦ Roles & Responsibilities Template • Section removed: ◦ Managing Volunteers
	10 March 2022	• Project Scoping and Team Building parts swapped • Project Scoping sections revised in the webbook: ◦ Project Scoping Summary ◦ Project Scoping Overview ◦ Updated Project Scoping Template
	23 February 2022	• Theme changed to Malala • Front matter sections revised in the webbook: ◦ About Rebus Community

		◦ Acknowledgments ◦ Introduction ◦ Removed 4 Steps to Starting an Open Textbook Project
2.0	29 September 2021	Revised: • Author Guide Template • About Rebus Community • Other Open Textbooks Created with Rebus Community Support
	9 June 2020	Added: • [Example] Proposed Formatting Workflow • [Example] Formatting Accessible Tables
	30 September 2019	Following chapters or sections edited for typos, Canadian spelling, or updated for broken links and other information: • About Rebus Community • Building a Team Overview • How to Build a Leadership Team • Recruitment Guide • Roles and Responsibilities • Managing Volunteers • Engagement Guide • Project Scoping Overview • Project Summary Template • Authoring and Content Creation Overview • Author Guide Template • Peer Review Process Guide • Review Guide Template (Google Docs) • Review Guide Template Hypothes.is) • Review Statement Template • Other Open Textbooks Created with Rebus Community Support
	30 September 2019	Second edition published, with updated book information and metadata. It includes the following additions: • 4 Steps to Starting an Open Textbook Project • Acknowledgements • Introduction • Praise for 'The Rebus Guide to Publishing Open Textbooks (So Far)' • Building a Team Summary • Project Scoping Summary • Authoring and Content Creation Summary • Editing Summary • Editing Overview

		• Hiring Editors • Peer Review Process Summary • Marketing and Communications Summary • Marketing and Communications Overview • Release Summary • Release Overview • Adoption Summary • Adoption Overview • Improvements and Maintenance Summary • Improvements and Maintenance Overview • Adaptations Summary • Adaptations Overview • Making Open Textbooks: A Video Guide • Feedback and Suggestions • About the Team • Accessibility Assessment • Licensing Information • Version History
1.0	October 2018	Original