Application Guidelines for Open Educational Resource (OER) Grants

November 6, 2019

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Purpose of the OER Grant
The University of Victoria Students’ Society (UVSS), the Division of Learning and Teaching Support and Innovation (LTSI), UVic Libraries (Libraries), Student Affairs, and University Systems are providing grants for the purpose of the adoption, adaptation, or development of open educational resources (OERs) for undergraduates with the aim of replacing existing textbooks or educational resources that can be prohibitively expensive. Ideally, the completed OERs will be useable not just at UVic, but other post-secondary institutions.

What is an open educational resource?
Open educational resources (OER) are freely accessible, openly-licensed documents and media that are useful for teaching, learning, and research purposes.

What is an open textbook?
Open textbooks are one type of OER. Open textbooks are licensed under an open-copyright license and made available online to be freely used by students, teachers, and members of the public. Print-on-demand copies can also be made available at cost.

Eligibility for the OER Grant
Proposals are encouraged from all individuals teaching undergraduate courses at the University. Preference is given to those teaching larger classes, those teaching in faculties with generally higher course costs, and those teaching in faculties underserviced by OERs.

Project Funding for OER Grants
OER grant funding for any project is limited to a maximum of $5,000. The intent behind this limit is to distribute financial support across meritorious proposals (preferably in a diversity of faculties and divisions) in order to maximize direct benefits to a wide range of students.

OER Grant Application Date Deadline
We will consider complete OER applications that are received prior to 11:59 PM on January 24, 2020. We will notify all applicants of the adjudication decision by email no later than March 19, 2020.
OER Grant Application Requirements

Range of Proposals
The adjudication panel for OER grants will consider any proposal that aims to adopt or develop OERs, with preference given to those projects that demonstrate potential for significant large-scale or long-term impact. Examples include (but are not limited to):

- **Example 1 – Adapt and Adopt:** For one of your courses, replace a textbook and/or recommended learning materials with online educational resources. Adapt, revise, modify, alter, or customize as needed (e.g., for a different course level, update with current information, address diversity needs).

- **Example 2 - Create:** Create a new open educational resource from scratch. This might include a brand new open textbook, or other open learning materials (assignments, videos, presentations, diagrams, problem sets or test banks for an existing open textbook, supplementary learning activities, etc.).

General Criteria for OER Grants
OER proposals shall be adjudicated according to the following five criteria:

- The potential cost-savings to students based off the cost of educational materials being replaced, class sizes, as well as possible employment of TA’s for the project;
- Their potential impact on student learning and the student experience in the form of high-quality materials, and open and innovative pedagogy;
- Overall alignment with UVic strategic framework;
- Long-term plans to reuse the OER in courses in subsequent terms;
- The extent to which the OER will be freely and openly shared throughout and beyond UVic (e.g., through BCcampus); and,
- Feasibility of the OER being ready within a reasonable timeframe, preferably ready for the following winter or spring term.

Project Requirements
All OER projects must:

- Be released with an open licence, such as a Creative Commons licence (CC BY or CC BY-NC), which allows others to freely retain, copy, modify, remix, and/or redistribute the content;
- Include all source/editable files used in creating the resource (including any multimedia files) to easily enable further remixing and modifications; and,
- Be copy-edited.

Application Process
The UVSS, the LTSI, the Libraries, and University Systems will consider only complete OER applications that are received prior to **11:59 PM on January 24, 2020**. We will notify all applicants of the adjudication decision by email no later than March 19, 2020.
Following are the steps in the application process:

1. Download the OER grant application form.
2. Complete the OER grant application form. (Please respect the word limit for each item.)
3. Include all requested signatures. (Information is available on using digital signatures in MS Word.) If you use a physical signature, submit the electronic copy in Word without signature, and send a .pdf signed e-copy of page one of the application form to the LTSI.
4. Rename the completed Word document
   `<Surname_of_Applicant_First_Name_OERGrant_Jan20.doc>`
   (e.g., Doe_Jane_OERGrant_Jan20.doc) and send it to the LTSI. We will accept applications only electronically in Word document format. Note that we will not accept applications in .pdf format, but we will accept a .pdf signature page along with the complete word document.

**OER Budget and Accounting Requirements**

The OER application form requires that the primary applicant’s immediate supervisor indicate support for the project by a signature on the application. If the UVSS, the LTSI, the Libraries, and University Systems approves and funds the project, the LTSI will ask the administrative officer of the primary applicant’s home unit to assign to the primary applicant a distinct account to be used solely for approved budget items related to the grant. The LTSI will have viewing privileges on the account to monitor expenditures.

OER grants will expire on March 31st of the year two years after the grant is approved. For example, a grant approved in January 2020 would expire on March 31, 2022. On the expiry date of the grant or when the funds have been expended, whichever occurs first, the LTSI will notify the primary applicant’s unit to freeze the account so that no more spending can be incurred. On expiry, the remaining funds will be returned to the OER Grants Account. Any deficits are the responsibility of the awardee and their unit.

**Funds used for items other than those listed in the approved application budget must be pre-approved by the UVSS, the LTSI, the Libraries, and University Systems.**

**Eligible and Ineligible Expenses**

Applicants may propose using OER grant funds to pay students or other research assistants but must adhere to all university policies and procedures, including those pertaining to wage rates, vacation pay, and appropriate benefits. Please consult the Human Resources guidelines. Note that vacation pay of 4% is computed on the wage rate and that benefits pay of 10% is computed on the wage rate + vacation pay.¹ Please confirm pay rates with Human Resources to assure that you have current values.

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¹ For example, a graduate student serving as a senior assistant (CUPE 4163) after July 1, 2019 and before September 1, 2019 would have a wage rate of $26.08. The 4% vacation pay would increase the wage cost to $27.12 ($26.08 * 1.04), and the 10% benefits would increase the wage cost to $29.83 ($27.12 * 1.10). At this writing, the September 1, 2019 rate is not yet available.
Applicants and co-applicants *may not* use OER grant funds for the following:

- To be reimbursed for work related to the grant or to cover course release funding. (There might be rare exceptions, however. In an approved exceptional case, the grant may fund up to a maximum of $3,000 for teaching release time.) Therefore, individuals to be hired on the grant as, for example, a research assistant (RA), should *not* be listed as the applicant or a co-applicant.
- To purchase equipment or supplies normally supplied by the university.
- To use commercial services. If the proposal involves using an outside consultant, the copyright to any “product” remains open source. Contact the [LTSI Program Coordinator](#) if you have further questions on this issue.
- To cover costs of academic work, such as journal subscriptions.
- To cover costs of registration for, or travel to, academic conferences.

**Proposal Assistance**

We recommend that you receive consultation on your proposal well in advance of the proposal deadline.

**Resources to Support your Project:**

- UVic Libraries’ ePublishing Services, is available to support you in formatting your online textbook and for questions related to the use of images and any third party content. Liaison librarians are available to assist in identifying or suggesting resources for use in OER projects;
- LTSI – Technology Integrated Learning is available to support you in the use of technology tools, such as CourseSpaces and Online Academic Communities for adopting, adapting, and creating open educational resources;
- BCCampus’ [Faculty OER Toolkit](#) is an information resource about and guide to adapting and adopting Open Educational Resources;
- BCCampus has a [catalogue of open textbooks](#); and,
- BCCampus [BC Textbook/OER Directory](#).

**OER Proposal Adjudication**

After the proposal deadline, the adjudication panel will screen all complete applications to ensure that the proposals are appropriate for the OER grant. If the panel concludes that a proposal is a better fit with one of the other learning and teaching grants, the panel will contact the primary applicant to recommend an alternative source of funding.

The adjudication panel competitively evaluates proposals for an OER grant on the basis of:

- The potential impact on UVic students in terms of cost-savings and learning;
- The quality of the project goals and motivation;
- The feasibility of the plan and timeframe;
- Overall alignment with the UVic strategic framework;
- Potential for long term use and reuse throughout and beyond UVic; and,
- Logical alignment of budget with work to be undertaken.

An adjudication panel, composed of volunteer faculty, professional staff of the university, and UVSS directors reviews the proposals prior to the adjudication meeting and rates each proposal on the aforementioned criteria. Adjudicators also make qualitative comments on exceptional or problematic features of proposals. The proposals are discussed and ranked. Proposed budgets are sometimes modified.

Prior to March 19, 2020, the LTSI will notify the primary applicant of the panel’s decision and any recommendations for modification.

**OER Grant Awardee Responsibilities**

**OER Grant Awardee Commitments**
A primary goal of OER grants is to create an expanding community experienced in the use of open educational resources. We hope to build on the successes and lessons learned in this ongoing initiative to inform the broader teaching and learning community at UVic. Accordingly, we ask each successful primary applicant to commit to do the following:

- participate in a Welcome and Spring Update session with OER grant recipients:
  - Monday, May 4, 2020, 2:00 – 4:00 PM, HHB 128
- participate in a Fall Update session with OER grant recipients:
  - Tuesday, October 6, 2020, 3:00 – 4:30 PM, HHB 128

If Primary Applicants are unable to attend any of these events, they should inform the LTSI of a designate to represent the grant. Please hold these dates in your calendar.

**OER Grant Progress Report**
Successful grant recipients will complete a brief Progress Report by March 31st of the year following receipt of the grant, regardless of whether or not the project has been completed. For example, if a grant were approved in January 2020, a Progress Report would be due March 31, 2021. When submitting a Progress Report, applicants must include their detailed budget showing all to-date expenditures in Canadian funds.

**Project Completion and Final Report**
The Final Report provides grant awardees an opportunity to share their experiences with colleagues. The Final Report should include the project goals, outcomes of the project, and a brief discussion of your experience. You must also include a separate budget sheet describing expenditure details.

We expect successful applicants to share their project results with their departmental colleagues. If the grant recipient’s department were not to provide opportunities for sharing the project, we would be happy to assist in organizing an event to promote it.