



## Higher Education Academy/JISC Open Educational Resources Programme

### The HumBox Project: Final Report

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**"I think we've proved as a group that OER sharing is possible"**

*- Project partner, Aston University*

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#### 4. Executive summary

The HumBox Project is one of the 14 pilot projects which constitute the Subject strand of the JISC/HEA OER (Open Educational Resources) Programme. It is a collaboration between four HEA humanities Subject Centres (Languages, Linguistics and Area Studies; English; History, and Philosophy and Religious Studies) and a consortium of 10 partners in Humanities Departments, Schools and Research Centres in a range of institutions, as well as relevant Subject Associations.

The HumBox project lasted for one year (April 2009-April 2010) and had the general aim of encouraging the publication and sharing of learning resources by and across subject communities within the humanities field, and promoting interest in the study of humanities disciplines in UK Higher Education while raising the profile of UK HE worldwide. Our specific objectives were:

- To publish as open content a significant amount of digital humanities resources
- To provide a trusted and sustainable home for these resources online (a repository)
- To create an expanding national community of peers committed to publishing, sharing and reviewing online resources
- To meet the need for a light-touch process of peer review and quality enhancement for OERs
- To provide solutions to practical obstacles inhibiting the sharing of resources such as issues around copyright, metadata and licensing
- To raise awareness of OERs and embed a culture of sharing in humanities disciplines
- To create a robust model to sustain the further development of HumBox in the future

The project achieved and exceeded these objectives and our achievements as the project comes to a close are:

- Over 1100 digital resources published and shared online in a variety of media including videos, podcasts, handouts, interactive online activities, powerpoint lectures etc.
- The creation of a trusted, user-friendly and attractive online space (the HumBox) for sharing resources which offers dynamic social-networking style tools for building a community of users
- An expanding community of 220+ registered users who are active in publishing, sharing, using, re-using and reviewing each others' resources
- The creation of a process for peer review of OERs and renewed notions of how quality in open resources is understood
- Community-creation of guidance materials on using a repository effectively and on IPR and copyright
- An active user-community who are engaged in promoting HumBox and OERs in general across their institutions and to the wider community thus raising general awareness of OERs and initiating trends for sharing
- The creation of a model for sustainability which includes community input and technological innovation

Our significant conclusions are that OER publication *can* be successful when approached from a *subject* perspective and that humanities academics are willing to share their teaching resources and demonstrate their excellence as teachers in this way. The project also found that commonly raised concerns relating to OERs, such as quality of content, and copyright and IPR issues, could be re-evaluated and overcome.

The project team conclude the project year by asserting that the growth of this fledgling community will depend on continued support – both technical and academic – to maintain the strong forward momentum that the HumBox project has currently achieved, and that the beginnings of a culture change towards realising the real benefits of publishing OERs in the humanities is identifiably underway amongst those in our community who HumBox has touched.

## 5. Background to the HumBox project

### 5.1. How does HumBox fit with the wider OER programme?

The HumBox project is part of the Subject strand of the JISC/HEA OER Programme, and is a collaboration between four HEA humanities Subject Centres (Languages, Linguistics and Area Studies; English; History, and Philosophy and Religious Studies) and a consortium of 10 partners in Humanities Departments, Schools and Research Centres in a range of institutions, as well as relevant Subject Associations.

The original project bid grew out of a series of studies and research projects carried out over the last 5 years by the Subject Centres involved in the project. The strong messages revealed from this early work revealed positive and extremely nuanced community opinions towards sharing and re-use of teaching materials online.

The key issues that the project hoped to explore were how to get humanities colleagues sharing their teaching materials and whether we could foster interdisciplinary sharing of resources.

### 5.2. The state of OER Release and resource sharing prior to HumBox

#### **5.2.1 English Literature, English Language and Creative Writing**

The LAMS<sup>1</sup> project (Reusing Learning Materials in English Literature and Language) carried out by the English Subject Centre in 2005, explored the potential for the sharing and reuse of learning designs created with the Learning Design tool - LAMS - as well as exploring attitudes towards 'sharing' more generally in the literature and language communities. Through both quantitative and qualitative studies across three types of HE institution, a culture of sharing was shown to exist and the overwhelming majority of academics involved were prepared to make their materials available to others to use - particularly in subject-specific repositories/collections. The main issues they had were around fears about the 'quality' of the resources and for an individual's reputation (would the materials be fully representative of the teaching & scholarship of that individual?).

A national scoping study of e-learning carried out in 2005 also provided useful data in relation to sharing e-learning material. Key findings were that: '*reputation*' of the person or organisation producing the resource was considered extremely important when choosing resources made by other people, as were '*recommendations*' from colleagues and the degree to which a resource could '*easily be contextualised*'. 61% of respondents also mentioned that their teaching practice would change if they had access to a 'wider range' of e-resources.

#### **5.2.2 Philosophy and Religious Studies (PRS)**

The PRS Subject Centre also scoped the use of e-learning and explored attitudes to sharing in a national survey in 2007/8. Notably the survey identified that there was widespread enthusiasm for 'sharing ICT resources between academics, students and institutions' (86% of respondents agreed or strongly agreed). In addition 70% of respondents to the survey were already sharing their e-resources with others though it was not clear where exactly they were sharing them. Barriers identified to sharing included ownership of resources as well as the time required to actually find the online resources that are available.

#### **5.2.3 Languages, Linguistics and Area Studies**

The LLAS Subject Centre and the University of Southampton have worked on a number of projects which have explored issues round the storing and sharing of language learning resources in a dedicated community repository (the JISC-funded *L20: Sharing Language Learning Objects*<sup>2</sup>,

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<sup>1</sup> <http://www.english.heacademy.ac.uk/explore/projects/archive/technology/tech10.php>

<sup>2</sup> L20 project: <http://www.elanguages.ac.uk/researchcommunity/projects/l20.html>

CLAReT<sup>3</sup> and Faroes<sup>4</sup> project as well as the Edu-serv funded MURLLO<sup>5</sup> project). These projects had two broad areas of investigation: the specific technical and metadata tagging requirements of a digital repository for a particular teaching community, and the development of initiatives for sharing, re-purposing, reviewing and editing of learning resources in the area of language teaching. These projects revealed that language teachers wanted simple technical processes, a minimal metadata requirement, and considerable support in understanding how to disaggregate their material into re-purposable core resources and in how to make material available for colleagues to share. Issues of IPR, copyright and trust were also shown to be obstacles to the sharing of resources.

The Faroes project in particular developed an innovative repository called the LanguageBox<sup>6</sup> which provides easy storing and previewing of online digital content for use by teachers and students, and incorporates some key affordances of Web 2.0 technology.

History, as a new subject grouping, had not had the opportunity to carry out any studies prior to the HumBox project.

### 5.3. Building on previous work

The work outlined above, which was carried out across the humanities in UK Higher Education prior to the HumBox project, had identified that a potential sharing community existed, that the community wanted easy access to quality (preferably peer-reviewed) learning materials in subject specific rather than 'generic' repositories and that depositing materials into any collection would need to be straightforward and fast. In addition more information about actually creating quality teaching/learning materials with sharing in mind was required. Research with the use of the *LanguageBox* had also shown that community-based approaches with web 2.0-type social features, were also extremely popular and provided a way to provide recommendations from colleagues, comments and other features identified as potentially valuable by the respective communities.

There had not been a repository built specifically with humanities practitioners in mind up until this point. National OER initiatives that were implemented prior to this project had been poorly supported by the humanities communities. The project partners felt that the humanities offer rich opportunities for the sharing of online resources both within and across disciplines (e.g. the overlapping of renaissance literature with history and religious philosophy) and the pooling of teaching resources into an overarching 'humanities' umbrella would mean that we would be able to build up a critical mass of resources, an important issue when trying to encourage engagement with collections of this sort.

The project team were aware of the need for our own platform and through the LLAS Subject Centre's successful work with the *LanguageBox* and the potential for hosting and support from the School of Electronics and Computer Science at Southampton University, a decision was made to clone this repository and rename it HumBox.

### 5.4. How the HumBox Project proposed to advance OER release

The HumBox project hoped to address the lack of shared and accessible resources in the humanities by collecting a broad range of diverse digital learning resources which provide both a wide subject coverage and a variety of formats. It also aimed to address the lack of an embedded culture of sharing across the humanities disciplines with an active programme of education, awareness raising, peer review and dissemination.

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<sup>3</sup> CLAReT project: <http://www.elanguages.ac.uk/researchcommunity/projects/claret.html>

<sup>4</sup> Faroes Project: <http://www.elanguages.ac.uk/researchcommunity/projects/faroes.html>

<sup>5</sup> MURLLO project: <http://www.elanguages.ac.uk/researchcommunity/projects/murillo.html>

<sup>6</sup> [www.languagebox.ac.uk](http://www.languagebox.ac.uk)



The project team intended to tweak the existing repository interface for its HumBox incarnation to exploit the kind of networking possibilities that web 2.0 tools can provide and be self-policing. In this way, individual account holders would have dedicated profile pages; collections of resources could be made and shared; comments on resources would be possible, and contributors could contact each other directly through the site.

The team hoped that the HumBox would be a 'first' for the humanities and that it would enable practitioners to do the sharing of resources that they had told us they were keen to do, and would open the pool of quality digital resources available to the humanities community worldwide.

## **6. Aims and Objectives**

### **6.1 Initial aims and objectives**

The overall aim of the project was to encourage the sharing of learning resources by and across subject communities within the Humanities field. Key objectives were to exploit a range of previously developed tools, to enhance the variety of resources available to students, to promote interest in the study of Humanities disciplines in UK Higher Education and raise the profile of UK HE worldwide.

Specifically, this comprised the following objectives:

- to discover, review and revise (as appropriate) digital resources from a range of humanities disciplines and to share them as open content. It is expected that at least 400 separate learning resources will be deposited (however, the number of credits per resource will necessarily vary). The resources are expected to include, for example, reading lists; podcasts; lecture slides; videos; quizzes; worksheets; mindmaps; digital timelines; learning objects etc;
- to provide a trusted and sustainable community repository. In addition to the dedicated humanities repository HumBox, resources will also be submitted to JorumOpen and other relevant online spaces such as Second Life University-owned islands, University iTunes U sites and YouTube;
- to create an expanding national community of peers committed to sharing and reviewing online resources from a range of subject areas in their own disciplinary contexts, which have a global reach;
- to embed the culture of shared, open educational resources across the humanities community fostering an increased awareness of and commitment to sharing humanities resources;
- to meet the need for a light touch process of peer review and quality enhancement in the delivery of shared learning resources;
- to provide solutions to practical obstacles inhibiting the sharing of resources across the humanities. Particular attention will be focused on metadata, licensing, copyright and intellectual property rights;
- to create a robust model to sustain the further development of HumBox in the future.

### **6.2 Amended aims and objectives**

These aims and objectives did not change as the project progressed and, in most cases, we achieved more than we had initially expected.

In reference to submitting resources to other sites, the project team intend to communicate with JorumOpen using an RSS feed. The technical team have implemented a special 'export to Jorum' functionality as part of the export function in searching on HumBox, and this allows users to search for and select particular resources, send the feed to the Jorum team who can then harvest the resources. This will allow the project team to update the JorumOpen archive periodically as new resources come online on HumBox. Some HumBox resources are available through other sites (e.g. the Warwick University iTunes U site), but project partners are in the process of exploring other online repositories for their materials. It should be noted that iTunes U and YouTube Edu are available only on an institutional basis, so use of these repositories is dependent on partner institutions being subscribed.

## **7. General Approach**

The project was based on well-established methods of working with the academic community which have been developed by the HEA Subject Centres leading the project. Subject Centres have a 10-year history of engagement with their communities based on creating opportunities for practice sharing between academics, as well as offering practical training in areas relating to pedagogy, e.g. teaching methodology, e-learning, assessment. The involvement, in a background supporting role, of our relevant subject associations gave the project an important element of credibility with our partners' institutions and departments.

The approach taken was one of shared ownership between the project leaders and their partners drawn from humanities disciplines across 11 different institutions. Thus subject partners were engaged in the process from the outset and played a key role in informing the project outcomes and developing strategies for enhancing impact. The partners were drawn from known contacts with an interest in online learning or in working collaboratively across institutions. Most knew little about OER or technical solutions for sharing resources online, thus were representative of a typical target user/depositor of open resources in the humanities – the project was targeted at people new to sharing, with little technical expertise with an interest in research and/or teaching. The project set out to create a fledgling community of OER sharers who would act as ambassadors for the project and for the OER initiative. It was clear that there would be a need to provide support for the partners in the form of training in the use of the repository, networking activities to build a cross-disciplinary community and to advise on issues such as IPR/Copyright and peer review in the context of OER. Thus the following methodology was developed for the project.

### **7.1 Recruitment of users and depositors from the humanities academic community**

The project focused on teachers/researchers in the humanities being the principal depositors of the OERs in HumBox, and our core project group would play a key role in creating a culture of cross-disciplinary sharing and re-use of resources, and co-developing (with the project leaders) a process of peer reviewing and commenting within this professional subject community. Teachers were also to be the primary *users* of the OERs, in that most of the resources to be collected originated from face-to-face teaching contexts and it was assumed that teachers would interact with the resources by repurposing or downloading them before using them with students. However, in practice it was also probable that many resources would be of benefit to learners who could come to the repository and access materials directly.

It was intended that project partners should engage directly with the HumBox repository, creating their own user profiles, uploading their own resources and commenting on others' resources. This user engagement and ease of use was a key factor in the choice of repository and indeed all new users are asked to engage with the repository in this way with a need for minimal support (online rather than face-to-face as was the case during the project lifetime). It was felt that this would have the dual benefit of building a community of 'sharers' and also help HumBox to be sustainable beyond the lifetime of the project.

### **7.2. Institutional partners gather resources for HumBox from their own and colleagues' materials**

The project management team identified partners across 12 different institutions who were keen to take part in the project. In the first phase partners were expected to source and gather materials from colleagues across their institution and make these materials available for sharing. Each Subject Centre was to monitor and oversee submissions in their particular subject area.

Partners were asked to collect a wide range of types of resources in a variety of media. They were encouraged to consider the granularity of resources and to disaggregate and deposit teaching

material where possible in small 'bite-sized' chunks (e.g. one powerpoint and a related handout). There were two reasons for this: firstly, it was felt that smaller items of content allowed for the maximum amount of possible sharing and re-use of materials; and secondly, the design of the HumBox encouraged this level of granularity. It is possible to deposit multiple files into HumBox, but this is not the most transparent way to demonstrate the content or make it discoverable to others. The ideal 'resource' on HumBox consists of an item of teaching and learning content which consists of no more than about 4 related files. If a user wishes to deposit a number of resources AND to show a connection between them, HumBox has a facility whereby users can make a collection of resources which then has its own URL, title, tags and a description. In this way, users can demonstrate connections of any kind between individual resources on the site by making a HumBox collection.

### **7.3. Institutional partners "publish" collected resources in HumBox**

The project focused on the idea of publication of resources (the notion of publishing rather than depositing was something that particularly engaged the project partners) and was fortunate in having access to a dedicated subject-specific repository: the HumBox.

It is worth noting that the humanities were highlighted as an area in which sharing of resources was not commonplace and that there was a need to create a project to support this. The repository used was built on an existing subject/community repository, called the Language Box, developed by the School of Electronics and Computer Science<sup>7</sup> at the University of Southampton explicitly for use by non-technical subject teachers. Consequently there was an emphasis on ease of use and minimal technical development was envisaged. However, access to the site was to remain restricted (it could be viewed but no deposits or downloads outside the project team would be permitted) until it officially launched to allow project partners space to experiment and to work on their materials.

Once materials were successfully tagged, evaluated, polished, repurposed, commented on, and appropriately licensed by project partners, they would then be deposited into JorumOpen (which was still under development at the start of the project) and uploaded to other online sites, as appropriate.

#### **7.3.1. Technical issues: Minimal Metadata**

Experience from previous projects<sup>8</sup> indicated that a requirement for high levels of metadata strongly discouraged users from sharing their resources. This led the project management team to agree that HumBox would use a minimal set of manual metadata: title, description, and keywords/tags. This would be supplemented by 'creation date' which was a mandatory requirement for the programme. The programme tag 'ukoer' was to be automatically added to each resource, and for management and organisational purposes partners were encouraged to add 'oerprs, oerllas, oereng or oerhist' to reflect their Subject Centre affiliation. Information about the user and deposit date was to be auto-filled from profile details or by the system. Beyond these requirements, depositors faced no restrictions or recommendations on metadata: users would have total freedom in the hope that the community itself would begin to standardise and regulate the tags and metadata.

### **7.4. Institutional Partners review (comment on) resources in HumBox**

The project intended to explore issues of trust and quality in the sharing of materials, and in order to do this, the Subject Centres planned to run workshops for partners in which material submitted under their subject strand would be evaluated, comments offered and potential themes for collecting material together identified. The intention behind this approach was that it would encourage partners to consider trust and quality when submitting their own material to an open repository, and thereby reduce the 'fear factor' associated with publishing one's resources openly online.

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<sup>7</sup> [www.ecs.soton.ac.uk](http://www.ecs.soton.ac.uk)

<sup>8</sup> LLAS involvement in JISC-funded L20: *Sharing Language learning objects*; and *Faroer project*

A further cross-subject, 2-day workshop was scheduled to be held to begin the process of exploring interdisciplinary applications of the shared resources. This workshop would include the evaluation of resources collected thus far, and the selection of individual items for the addition of comments, modifications (minor formatting changes/polishing) or as potential candidates for repurposing. The intention was that this process of evaluation, reviewing and repurposing would be initiated at the workshop and implemented and maintained during the lifecycle of the project.

## **7.5. Project team provides guidance for HumBox users**

The project team offered initial guidance on the kinds of resources appropriate for loading into HumBox (in terms of granularity, see 7.3) but planned to construct further guidance documents in direct consultation with project partners and using feedback from project activities and communications. It was assumed that by the end of the project, the wider project team would have produced guides on areas such as good practice in tagging and peer review; advice on copyright issues and technical guides for using HumBox. The management team also intended to liaise with other projects so that advice could be pooled and shared.

### ***7.5.1 Legal issues: Demystifying copyright and licensing practices***

The project team were aware that copyright and licensing in the area of OER can be confusing and contentious, and so it was decided that items in the HumBox would follow the practice established by the previously mentioned Faroes project (which created the *LanguageBox* repository) and be deposited under one of two different licences:

- Creative Commons attribution non-commercial share alike
- Creative Commons attribution non-commercial no derivatives<sup>9</sup>

These free licences have been developed to enable users to publish and share their work while retaining some rights. The 'share alike' license allows users to download, remix, edit and adapt a resource and then republish it under the same terms. The 'no derivatives' option permits the use of the resource but does not allow any changes to be made to it. This licence was included as there was a concern that requiring all resources being editable by others might inhibit sharing because of concerns relating to misuse or infringement of third-party copyright. Both licences require users to attribute the original author and permit the use of the resource for non-commercial purposes only. The project team felt that these licence options could be altered later in the project, if required by the community, or alternative licensing options could be added. At this stage, we did not consider the significance or debatable nature of the 'non-commercial' designation.

The project team felt that issues of third party copyright could have the potential to impact strongly on the project, and so it was decided that a dedicated digital rights officer(s) would be appointed at the earliest opportunity. That the project should consider adequate support and advice on copyright and IPR issues was a subject forcibly pushed home at early JISC/HEA programme briefing meetings, and that copyright was a real concern for our community was borne out by the research mentioned in section 5. The role of the digital rights officer on the project would be to provide advice to project partners on the current state of the law and practice in relation to OERs; offer suggestions on how to minimise the risk of copyright infringement; review individual items on the HumBox and identify potential copyright issues, and obtain rights clearance if necessary.

## **7.6. Dissemination and promotion of HumBox and OER: the Education Campaign**

The project proposed an active education and marketing/promotional campaign from the outset, which aimed to generate a high level of interest in the HumBox and extol the benefits of embracing the OER movement in general. This comprised the following:

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<sup>9</sup> [www.creativecommons.org](http://www.creativecommons.org)

- early production of publicity material for the project for use by project partners and the project team; attendance at events where the project could be publicised; participation in local and national OER/repository events and the use of established HEA Subject Centre networks and dissemination methods (e.g. websites, newsletters, and magazines). Partners were also encouraged to hold dissemination events within their own institutions.
- Cascading and word of mouth – project partners would use local and subject networks to engage colleagues, managers and other stakeholders in the idea of OER for the humanities. This might involve email contacts, small presentations of the HumBox at staff meetings, discussions with senior managers, individual contacts with colleagues etc.
- The HumBox itself – creation of an attractive interface, purchase of an easy to remember .ac.uk URL, presenting project partners through the profile pages
- Engagement of host schools and institutions – this was to evolve less systematically than other areas of the dissemination campaign as the partnerships created were with individuals rather than institutions thus engagement at the institutional level would be dependent on the outreach work of each partner.

The reasons for embarking on such a campaign at an early stage in the project were simple: we wanted to recruit more users to the HumBox community and assist our project partners in sourcing resources and promoting the project across their own institutions. It was intended that this proactive attitude would improve the profile and sustainability of the project.

### **7.7 Evaluation of the project and impact of HumBox ‘method’ on the community**

An early electronic survey was planned to evaluate departmental attitudes to OER generally and to act as a baseline for future attitudinal measures of improvement. The survey would be run again at the end of the project to assess changes in attitude. Other plans for evaluating the project included ongoing reflection on and analysis of project processes which has been well-documented through the project communication space on Basecamp; electronic means through Google Analytics and recording of information from monitoring features within HumBox. Formal evaluation of the project would be conducted using the Higher Education Academy's own framework.

Partners were contracted to produce a report on their view of the impact of OER through the HumBox project which were collected through videotaped oral reports (now available in HumBox, for details, see section 9).

### **7.8 Strategy for sustaining the future use of HumBox**

Early engagement of project partners played a key role in the sustainability plans for this project as it was felt that continuing partner engagement was vital to the achievement of a critical mass of resources in HumBox. This would enable the repository to become a key showcase for the quality and variety of resources that could be shared through OER. It was also essential to the long-term future of OER in the Humanities that the repository should include a significant number of commented resources and collections as exemplars for future users. In addition, having profiles of the partners with their institutional affiliations could be viewed as a means of inspiring the confidence of Humanities colleagues in the HumBox and in OER in general. Our intention was for our partners to continue to use and publicise HumBox beyond the life of the project.

## 8. Implementation

### 8.1 Initiating the project

One of the key challenges for the HumBox project (in common with all OER projects) was the short, one year, timescale during which a community of sharers and a critical mass (360 credits) of resources needed to be established. The HumBox Project was to benefit greatly in this respect through being led by a consortium of four HEA Subject Centres who were all well-used to managing projects (often on short timescales) and networking with academic colleagues within humanities disciplines. In addition the project plan clearly articulated when and how the project activities should be achieved which involved the following initial activities:

#### **8.1.1 Management and communication**

Each Subject Centre took responsibility for leading a particular area of the project: LLAS led the project in general and its technical development; English led dissemination and publicity; History led on the reviewing process, and PRS led on evaluation. This division of responsibility enabled the project to advance rapidly and simultaneously on several fronts.

The project management team met frequently via Skype to discuss progress and to engage in forward planning, and these meetings were supplemented by several face-to-face meetings over the lifetime of the project. The principal project communication tools were Basecamp<sup>10</sup> (project management software) and email lists. Basecamp records project milestones, allows for file-sharing and idea sharing via wikis, has a message board, and sends out email to all project participants. It was widely used for all these purposes throughout the duration of the project, and became the preferred way for project partners to contact each other and the management team. A project blog was also established.

A meeting of all project participants was held early in the project (mid-May) in order to outline project aims, discuss shared goals and ambitions for the project and train participants in the use of the repository. The open and collaborative nature of the project (as outlined in section 7) was emphasised at this meeting and this general approach did not change throughout the lifetime of the project, although the need to manage expectations from partners became necessary as their interest and enthusiasm for the project grew.

#### **8.1.2 Consortium Agreement**

In common with all OER projects, a consortium agreement between partners was required and it was decided to restrict this to the four Subject Centres leading the project, with lighter-touch partner agreements being made between each consortium partner and their subject partner institutions. The former was not an easy task because of the absence of an already approved template for use with OER projects (this programme has no apparent precedent) which necessitated a rather *ad hoc* pulling-together of an agreement from other similar template agreements. This document had then to be passed by each institution's legal department. This took several months, longer than expected and was not helped by a national postal strike!

For the partner agreements, a simple contract was drawn up based on similar agreements which the Subject Centres involved in the project frequently make between their organisations and individuals receiving funding for project/research work. Each contract specified each partner's obligations under the terms of the project, which included attendance at meetings, dissemination activities, engagement in project activities and contributing resources. It also indicated a payment scale by which partners could increase the amount of funding they received by increasing the amount and variety of resources contributed. The contract was signed with the Subject Centre representing their discipline area. It was

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<sup>10</sup> <http://basecamp.com/>

easier to get such a contract signed off rather than a full consortium agreement, and therefore contributed to the rapid initiation of the project.

Recommendations for future use of consortium agreements can be found in section 11.

## **8.2 Gathering resources**

Resource collection was initiated very early in the project with subject partners being asked to collect and deposit resources in the HumBox repository over the first four months of the project. This initial 'push' for resources was done for two reasons: firstly, a key aim of the latter half of the project was to allow users to spend time reviewing, editing and polishing their materials; and secondly, the project management team were aware of the concerns many academics have about openly sharing their resources, and that this may have led to problems in getting the amount of resources required by the programme (360 credits-worth).

The HumBox was set up so that only project participants could register and deposit resources (although the rest of the world could see the resources). This closed, 'working' nature of the repository ensured that project participants felt secure in the knowledge that they could remove, edit and polish their resources in an environment perceived as 'safe'. In the context of this background, a 'give us resources, ask questions later' policy was initiated: we made it clear that questions of copyright, quality, shareability, or appropriateness for inclusion would be dealt with later. In addition it gave the project a space in which to explore OER and community sharing while JorumOpen was in its final stages of development. This worked extremely well given the short timescale of the project and by the 2-day cross-disciplinary peer review workshop in September 2009, we had already exceeded our target of 400 resources. This number continued to grow steadily throughout the project and continues to grow even as the project itself draws to a close. The resources submitted to us covered all media types, including powerpoint files, Word documents, pdfs, learning objects, images, audio files, video files.

Project partners required some guidance in uploading resources in relation to granularity (see section 7.3), purpose (teaching rather than research outputs), and copyright (see section 8.5 for a fuller discussion).

A major benefit of having funding for the OER process is that one partner institution, the Humanities Research Institute, University of Sheffield decided to employ a postgraduate researcher, Matt Phillpott, as an assistant on the project. Dr Phillpott was involved in the deposit of material from across the Humanities at Sheffield and proved particularly invaluable when owing to the loss of three staff members the second Sheffield partner, the Department of Biblical Studies had to withdraw from the project, Matt was able to step into the breach and upload resources from this department. As a short-term solution to populate HumBox this was invaluable (if unsustainable) and had the added benefit of producing a real champion of OER who contributed extensively to the project through working on his own deposited resources and reviewing the work of others.

## **8.3 Technical development**

The HumBox repository was in place within two months of the start of the project. It is a version of the existing LanguageBox repository, but with its own unique identity, the hummingbird, and colour scheme. It was extremely helpful to have a repository in place at the start of the project ready for participants to deposit resources and act as a focus for realising our project aims and the striking and appealing design did much to inspire and motivate partners.

Technical development was not a key part of this project, but the project management team invited participants to suggest ways in which the site could be improved in terms of look and functionality as the project progressed. A wiki 'technical wishlist' was set up on Basecamp to collate ideas on this subject, and all project participants were encouraged to report bugs and put ongoing technical



requests to the LLAS team to improve immediate functionality. The enthusiasm of project participants outpaced the technical team very quickly and we currently have about 25 items remaining on the technical wishlist which we hope to implement in HumBox at a later date.

Technical development on HumBox went on throughout the life of the project and continues today. It included: upgrading the site to ePrints 3.2<sup>11</sup>; work on browsing and searching; addition of a 'help' section; alterations to the styling of the site; customisation of the deposit screen; adaptation of the existing profile page to include a news feed and other customisable widgets; and the addition of a terms and conditions tick box. It also included the implementation and testing of robust features to make bookmarks; to make collections within HumBox; to comment on others' resources; to preview videos, audios and other files in an embedded screen, and set up email alerts and emailing contact through the site.

As development on the HumBox progressed, project participants' feedback led to the creation of help and guidance material on using the site, and one project partner, Robert O'Toole (University of Warwick) undertook to create screen capture videos to assist users of HumBox in navigating and using the site.

During the course of the project, we acquired the URL [humbox.ac.uk](http://humbox.ac.uk) for the HumBox. We felt that this was important to give the site academic credibility.

#### **8.4 Peer review, editing and polishing of OERs**

We held our planned two-day cross-disciplinary review workshop on 14/15<sup>th</sup> September, 2009. All project participants attended and took part in sessions analysing, discussing and reviewing the resources in HumBox. Inevitably, we achieved less in terms of cross-disciplinary reviewing than we had initially hoped from the actual event, but the workshop was a success nonetheless, initiating the processes of reviewing and cross-disciplinary sharing which evolved as the project went on and enabling the project participants to bond with each other in sharing their enthusiasms for OERs and ideas on aspects of project development (e.g. nature of reviewing OERs, technical development etc).

It was during the course of this meeting that the project team realised that some rethinking was needed on the nature of peer review for OERs. The group discussed and decided how the term should be understood in the context of OERs and concluded that it should be interpreted in terms of the use and 'shareability' of the resource. Participants decided that notions of the quality and the value of a resource (to others) were highly subjective and personal: it would be impossible to predict how another HumBox user might wish to re-use a Humbox resource. Bearing this in mind, project members concluded that reviews or comments on each resource should enhance the resource in some way, for example by giving advice on how the resource might be used in other teaching contexts; giving additional technical information or drawing out innovative pedagogical or technical methods used in the creation of the resource.

The discussions held at this workshop influenced the creation of advice on reviewing and commenting produced for the HumBox site (see section 9.2).

The workshop initiated the review process and project participants were asked to comment on at least 10 different resources. This process of reviewing and commenting continued throughout the life of the project and has resulted in a lively community of reviewers communicating via the comments box which was added to the repository during the project. It has also resulted in depositors reviewing, editing and polishing their own materials in response to comments put on the site.

Our initial aim was to include review comments on a majority of HumBox resources, but our success in getting the humanities community to upload materials (over 1000 to date) has meant that this will

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<sup>11</sup> <http://www.eprints.org/>

not be possible by the end of the project. However, we have established an interest in this activity within our fledgling community of sharers, and over 10% of resources on the site have been reviewed so far. We hope that reviewing of HumBox resources will continue.

## 8.5 Copyright and IPR

At an early stage in the project, LLAS recruited two individuals to share the role of digital rights officer: Erika Corradini was drawn from the LLAS team and Oren Stone was seconded from the University of Southampton library. The rights officers researched the current state of copyright law in relation to OERs; conducted a survey of policies on this issue amongst existing open repositories; liaised with institutional legal experts and spent a large amount of time looking at resources in HumBox and advising on areas of possible risk of rights infringement.

A number of copyright issues came to light during the process of checking resources, including: how to deal with resources featuring institutional logos; correct attribution of images; resources published under the fair-dealing exception 'criticism and review'; resources published under CC licences but with 'all rights reserved' copyright on the actual resource; research material that had been previously published in paper form in a book or journal, and archive material which was made available with 'some rights reserved.' The HumBox rights officers advised on each issue as it was brought to them, and this resulted in resources or metadata being edited on an ongoing basis. Support and advice during the project was received from the University of Southampton legal team and from support documents available from JISClegal in their research.

The rights officers were instrumental in drafting terms and conditions and a take-down policy for the HumBox site. They also adapted an online resource which gives advice on rights issues ('the copyright helper') using opensource software<sup>12</sup> which was created by St George's Medical School and made known to us via the MEDEV-led OER project. This is available on the HumBox help pages (see section 9).

The research conducted by Erika and Oren and the application of it in practice to HumBox resources was of intense interest to other OER projects and within the University of Southampton itself. Southampton has six different departments taking part in the OER programme subject strand, and has an active team developing a variety of repositories in the School of Electronics and Computer Science (including HumBox). This led to HumBox hosting an event, in conjunction with EdShare (Southampton's institutional repository), and funded through the JISC benefits realisation programme, on 'IPR and copyright for OER'. This event involved presentations and discussions on how institutions could help their academics to publish their teaching resources online. It was attended by about 40 people including legal experts from within the University of Southampton and the JISC, by academics and OER project members. One of the major outcomes of this event was the initiation of an institutional OER policy and close working between the legal team at the university and the Director of e-learning.

It should also be noted here that having non-legal experts supporting the IPR/Copyright aspect of this project has been very helpful in mediating between academics with little understanding of IPR and copyright issues and university legal services who are often seen as barriers to open sharing. There is still a considerable need to educate academics in this area and to achieve an approach to IPR and copyright which takes a realistic view of the risks of sharing and how they can be practically managed in an OER landscape.

During the project, questions were raised about the usefulness of the 'non-commercial' designation in the CC licence, and whether we should offer more licensing options to users. The issue was discussed at our meetings, but we found that our community of users liked having that restriction in

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<sup>12</sup> <http://sourceforge.net/projects/openlabyrinth/>

relation to educational materials – it was a concept they were familiar with and seemed reassuring. In the light of this, we decided to keep the licences originally chosen and offer more choices later in HumBox's life. We also wished to keep the process of using HumBox as simple as possible, because our primary focus was to get people to share resources online - and we did not want to encourage confusion by offering a profusion of licensing options and potentially throwing up barriers to the process. However, now the site is up and running, it would be preferable to give HumBox users more licensing choices for their resources and it is likely that HumBox will offer different licensing options soon.

Analysis of the resources on HumBox indicates that there is a high usage of the 'no derivatives' license. This is partly because we have lots of archive material available through the site which has some restrictions on it, but it is possible that users are choosing it as a secure 'default' choice for perceived added security. Much more research and investigation is needed on this aspect of usage of the site and whether using the 'no derivatives' designation encourages or inhibits sharing.

## **8.6 Dissemination and promotion**

As outlined in section 7.6, the team began a dissemination and promotional campaign early in the project.

### ***8.6.1 Partner activities***

Within the first two months of start-up, the English Subject Centre produced a promotional powerpoint document which partners could use within their own institutions and beyond to promote and explain the project. The team also produced a publicity leaflet which could be distributed by partners within their institutions and at Subject Centre events. Named project partners were encouraged to use these materials to get colleagues engaged directly with the project. They did this extremely well and in a variety of ways including local workshops, lunchtime 'show-and-tell' sessions, presentations at local institutional events, and one-to-one talks.

### ***8.6.2 Larger scale events***

The project team attended as many national events as possible with the aim of publicising the HumBox. These included presenting at external events such as the Open Learning Conference, in Nottingham, in November, 2009; OER10 in Cambridge, in March 2010; the upcoming HEA conference, and the Beyond Borders 2010 Conference, Oxford, 20<sup>th</sup> April 2010.

The management team made good use of planned Subject Centre events and publications to publicise the HumBox to their communities. This included presentations and sponsorship of a pre-event workshop at the LLAS elearning symposium, 29<sup>th</sup> January, 2010; presentation at the History Subject Centre annual conference; and publicity at the English Subject Centre's principal annual event. Articles about the project and the repository were also published in all the four Subject Centres' magazines or newsletters, and the HumBox was publicised at other Subject Centre events.

### ***8.6.3 The official launch event***

All project partners took an active role in the HumBox official launch event which was held at the University of Sheffield, on the 26<sup>th</sup> February, 2010. The day was introduced by the Acting PVC for Arts and Humanities at Sheffield, and featured presentations from the management team; presentations from project partners on their personal experience of using HumBox to share resources, and workshop time to play with the site. Publicity material was produced for the event, including: a range of 4 different postcards depicting resources from the HumBox; an information poster; HumBox-branded paper clips, and limited edition mugs (just for the launch).

These activities resulted in a HumBox community that consistently grew in size – it currently numbers more than 200 registered users. Most of these people are mainly active in viewing and downloading resources, but several members, outwith the main HumBox team, have embraced the site as a place to get their work published and known. Some of these new members have been directly drawn in through the events and initiatives detailed above.

## **8.7 Evaluation**

The Subject Centre for Philosophical and Religious Studies led the evaluation of the project. This began with a baseline survey conducted to establish existing attitudes towards sharing of resources in the humanities. A follow-up survey was conducted in the final month of the project in order to compare responses and to ascertain potential impact from the project and the OER programme in general.

Throughout the life of the project, the project management team took extensive notes and made video and audio recordings of project meetings (see section 9). These fed into ongoing reflection and evaluation of project aims and outcomes. Project partners were also asked to make their final report verbally on video rather than submitting a paper document (see section 9). The project workspace on Basecamp provides a very rich repository of interactions, reflections and ideas from the project participants and has come to be used as the major means of communication between partners who have used it to ask questions, add to the technical wishlist, report on dissemination activity and so on. This provides a valuable insight into the ways in which a community of interest can evolve over time and how a shared purpose and common goal can bring people together across discipline boundaries. This has also been reflected in the comments on resources in HumBox in which colleagues have commented on resources from subject or language areas outside their own. More on the outcomes of the evaluation can be found in section 10.

## **8.8 Problems and issues arising during the project**

The project suffered the loss of two of the original partners scheduled to take part: the Department of Biblical Studies at the University of Sheffield and the University of Aberystwyth.

The Department of Biblical Studies, University of Sheffield, dropped out at an early stage due to staffing issues, and the project team decided to reallocate some of the lost partner's funding to the project's other partner at Sheffield in the Humanities Research Institute who paid a postgraduate researcher based at Sheffield University, to assist with up-loading, reviewing and editing materials from the lost partner's department. The remaining funding was used for further dissemination activities, including the launch event, and for some LLAS inhouse web development to enhance the design of the HumBox.

The University of Aberystwyth dropped out at a late stage in the project due to the illness of key participants. In consultation with the programme manager, the project team decided to reallocate most of the Aberystwyth funding to each project team Subject Centre for further dissemination activities. This was an appropriate action at that stage in the project, as we had already launched HumBox onto the open web and were keen to register users and accrue more resources from the wider Humanities community who had not been directly involved with the project.

Ultimately the loss of these partners did not impact strongly on the project as the remaining partners were very active and the project was more than able to meet its aims and objectives.

## 9. Outputs and Results

### 9.1 Open Educational Resources released

#### 9.1.1 Individual resources in HumBox

The HumBox project has published over 1000 Humanities teaching and learning items in HumBox and that number grows by the day. The vast majority of items consist of more than one file, and so the number of discrete items in HumBox is estimated to be in more than double that figure, consisting of many thousands of hours of learning time. A vast range of resource types are included, from individual images; through to whole lecture podcasts; video materials for language studies; interactive online materials; powerpoint presentations; textual material of all kinds, and research articles. These cover a diverse mix of humanities-related topics including materials on history, study skills, languages, language-studies, philosophy, religion, English, archaeology, computing for historians, creative writing, and TESOL.

All resources have been uploaded by practitioners within the HE system in the UK, and have been used with students at HE level.

The term 'resource', in the HumBox context, refers to discrete items, consisting of a single-file document (Fig. 1), or a group of related files combined to work together, such as a handout, video and presentation that link into a single thematic unit (Fig. 2). HumBox allows resource creators to combine as many files as desired in an individual 'resource.'

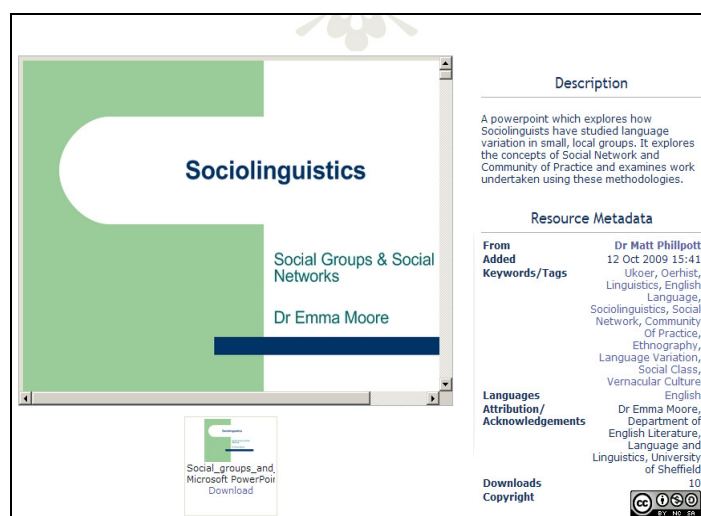


Fig. 1. HumBox resource #882 – example of a resource consisting of a single file

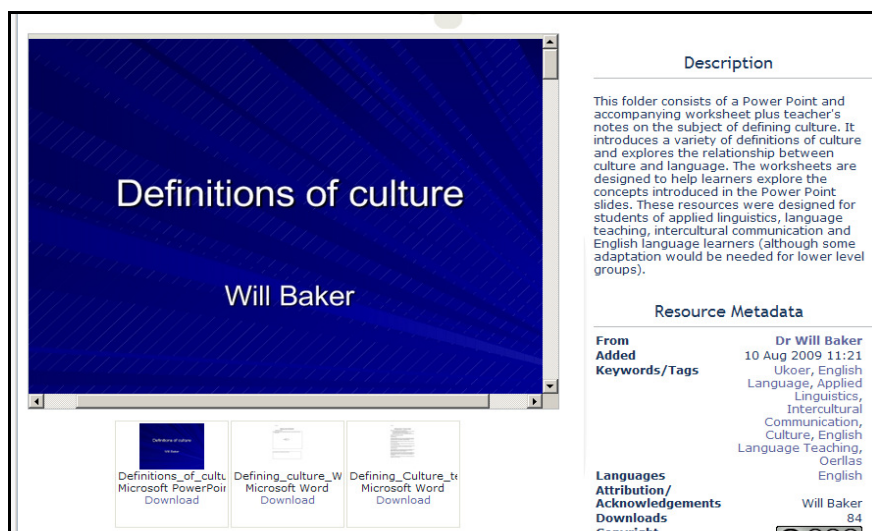


Fig. 2 HumBox resource #237 – an example of a multi-file resource

### 9.1.2 Collections in HumBox

Multi-file resources should not be confused with collections in HumBox. Once items have been deposited into HumBox, single- or multiple-file resources can be gathered to form collections. There are over 100 collections within the repository on a range of topics, including English, history, philosophy, languages, linguistics, religious studies, archaeology and classics etc. Some have been created by academics to bring together a series of their own resources. For example, lecture podcasts uploaded as individual resources on specific topics have been made into a themed series (Fig. 3).



Figure 3: a set of podcasts on Georgian Britain which have been gathered into a collection: #790


Alternatively, users have made collections of resources sharing a common topic. Collections can comprise any resource on the site and so frequently, collections contain materials from a variety of depositors, thereby making connections between themes and related resources in an interactive and dynamic way across the range of disciplines found in HumBox (fig. 4 and fig. 5).

### Resources in this collection




**The Beasts of Belsen**  
This resource is based around a newsfilm archive item 'The Beasts of Belsen,' using the GLO maker to develop interactive activities for students.

**Added On:** 13 Sep 2009 12:50  
**Added By:** Dr Deirdre Burke  
**Tags:** Ukoer, Ukoerprs, History, Holocaust  
**Languages:** English



**The Beasts of Belsen**  
This PowerPoint provides background information to support the Learning Object 'Beasts of Belsen.'

**Added On:** Unspecified  
**Added By:** Dr Deirdre Burke  
**Tags:** Ukoer  
**Languages:** English, German




**President Chirac's (1995-2007) stance on the Vichy regime and antisemitism.**  
After President Chirac's official recognition (1995) that France actively participated in deportation of Jews, commemorative plaques were erected on the wall of each Parisian school stipulating the number of

**Added On:** 13 Sep 2009 16:34  
**Added By:** Mr Emmanuel Godin  
**Tags:** History, Memory, French Studies, Jewish Studies, Antisemitism, Ukoer, Oerilas, Children, Deportation, Chirac, Vichy,

### Description

Collection of resources that link to the Holocaust.

### Resource Metadata

**From** Dr Deirdre Burke  
**Added** 17 Sep 2009 13:56  
**Keywords/Tags** Ukoer  
**Attribution/Acknowledgements** Deirdre Burke  
**Downloads** 0  
**Copyright** 

### Toolbox

⇒ Bookmark this Item  
⇒ Export this Resource as RSS

This collection on the Holocaust (#534) includes resources uploaded by the user Dr Deirdre Burke, but also material from other depositors. This material may be outside Dr Burke's core discipline but nonetheless relevant, adding a further dimension to the particular topic of study.

Figure 4: Resource no 534 – a HumBox collection

Home Browse About Help

Search...

Advanced search

Login | Create Account

Good resources collected as bookmarks

### Resources in this collection



**36 Basic Situations**  
A student handout identifying the 36 dramatic situations. These situations were identified by the Italian dramatist Count Gozzi (1720-1806).

**Added On:** 24 Jun 2009 02:15  
**Added By:** Mr Billy Brick  
**Tags:** Creative\_writing, Ukoer, Oereng, Drama, Situations, Gozzi  
**Languages:** English



**History Field Trip to Bradford**  
This is a history field trip resource to explore different aspects of the Victorian city. The parts of Bradford explored are Little Germany, Undercliffe Cemetery, Saltaire and Manningham Mills. The resources uses  
► Read More...

**Added On:** 12 Sep 2009 11:03  
**Added By:** Mrs Lisa Lavender  
**Tags:** Ukoer, Oerhist, History, Maps, Bradford, Victorian\_city, history  
**Languages:** English



**Georgian Britain - gender**  
A podcast lecture summary on Georgian Britain: a discussion on gender

**Added On:** 18 Aug 2009 09:08  
**Added By:** Mrs Lisa Lavender  
**Tags:** Ukoer, Oerhist, History, British\_history  
**Languages:** English



**Using images for character profiles**  
An exercise involving using images to create character profiles.

**Added On:** 24 Jun 2009 02:46  
**Added By:** Mr Billy Brick  
**Tags:** Creative\_writing, Ukoer, Oereng  
**Languages:** English

### Resource Metadata

**From** Mr Robert O'Toole  
**Added** 28 Sep 2009 11:35  
**Keywords/Tags** Ukoer  
**Languages** English  
**Attribution/Acknowledgements** Robert O'Toole  
**Downloads** 0  
**Copyright** 

Figure 4(a): a HumBox collection (#774) This collection includes resources collected by user Robert O'Toole for his own use

### 9.1.3 Reviews and comments

Resources and collections of resources in HumBox can also be reviewed and commented on. Comments on the site enhance each resource in various ways: by providing further information on how the resource could be used; by providing extra information or pointing to further resources on the topic; by indicating technical problems with using the resource or other problems with it, or offering further information to enhance existing metadata.

The example provided in Fig. 5 shows how the comment box functionality has facilitated interaction between resource users and resource creators (in giving technical advice on how to use a resource and offering further information on potential usage).

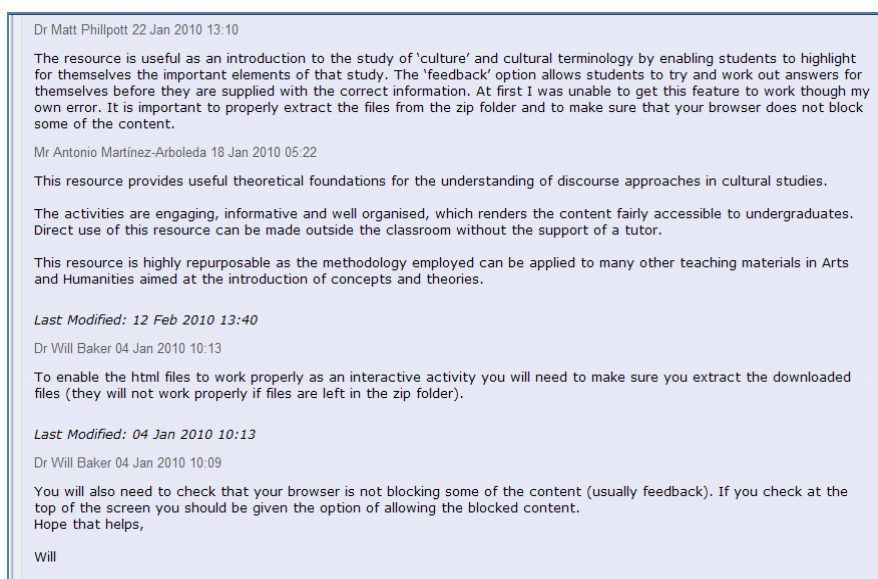



Figure 5: example of users' comments on a resource

### 9.1.4 Notes on particular HumBox resources

In addition to publishing teaching and learning resources, HumBox has also become an archive for resources held outside UK HE, (e.g. in national archives) which have been identified as having a potential for teaching in the Humanities field in HE (see Fig. 6). It has also become a home for original research material (Fig. 7) that is used in teaching at HE and may be difficult to find elsewhere, particularly in subjects not widely taught in the UK HE sector, such as Czech literature or Arabic.



## Fairground Images: Arthur Armstrong's Living Wagon





00020149.jpg



Associated\_data.doc

### Description

Whole side view of Arthur Armstrong's Living Wagon, taken Watt's Lane site, Rugby, 26 June 1959. This resource is the copyright of the National Fairground Archive, University of Sheffield (<http://www.nfa.dept.shef.ac.uk/>) and has been made available with their permission. Some rights reserved (see terms of licence by clicking on the CC licence logo below).

### Resource Metadata

<b>From</b>	Dr Matt Phillpott
<b>Added</b>	22 Sep 2009 11:05
<b>Keywords/Tags</b>	Ukoer, Oerhist, History, National Fairground Archive, Theatre, Performance Studies, Living Wagons, Warwickshire, Rugby
<b>Languages</b>	English
<b>Attribution/Acknowledgements</b>	Professor Vanessa Toulmin, National Fairground Archive, Theatre Studies/English, University of Sheffield

Figure 6: resource #340 forms part of a collection in HumBox, which the National Fairground Archive have made available with permission.

## The History of Czech Literature 900-2000

### Resources in this collection

	<p><b>Václav Havel</b> Word document - Information on the life and work of Václav Havel. Used as reference material in teaching</p>	<p><b>Added On:</b> 10 Mar 2010 10:21  <b>Added By:</b> Ms Claire Monaghan  <b>Tags:</b> Ukoer, Václav Havel, Literature, History, Czech, Czech Republic, Czech Literature  <b>Languages:</b> English</p>
	<p><b>Milan Kundera's Unbearable Lightness of Being</b> Word document - Review of Milan Kundera's Unbearable Lightness of Being. Used as reference material in teaching</p>	<p><b>Added On:</b> 10 Mar 2010 10:16  <b>Added By:</b> Ms Claire Monaghan  <b>Tags:</b> Ukoer, Milan Kundera, Unbearable Lightness Of Being, Literature, History, Czech, Czech Republic, Czech Literature</p>
	<p><b>Michal Viewegh</b> Word document - Information on the life and work of Michal Viewegh. Used as reference material for teaching</p>	<p><b>Added On:</b> 10 Mar 2010 10:09  <b>Added By:</b> Ms Claire Monaghan  <b>Tags:</b> Ukoer, Michal Viewegh, Literature, History, Czech, Czech Republic  <b>Languages:</b> English</p>

### Description

Texts, powerpoint presentations Information on the life and work of several Czech authors As reference material; power points are used in class to complement lectures.

### Resource Metadata

<b>From</b>	Ms Claire Monaghan
<b>Added</b>	10 Mar 2010 10:27
<b>Keywords/Tags</b>	Ukoer, Czech, Czech Republic, History, Literature, English
<b>Languages</b>	English
<b>Attribution/Acknowledgements</b>	Claire Monaghan
<b>Downloads</b>	0
<b>Copyright</b>	

### Toolbox

[⇒ Bookmark this Item](#)  
[⇒ Export this Resource as RSS](#)

Figure 7: A collection #1997 of research material that is used in teaching Czech at Glasgow.

The repository also hosts resources containing work created by students (Fig. 8). Such resources are not currently flagged up as being by students, and have been uploaded (with permission) by tutors. There are also resources with a focus on skills-development activities which can be used across the disciplines (see the example shown in Fig. 9).



Figure 8: resource #226 a student-created video on the work of the Spanish playwright, Galdós

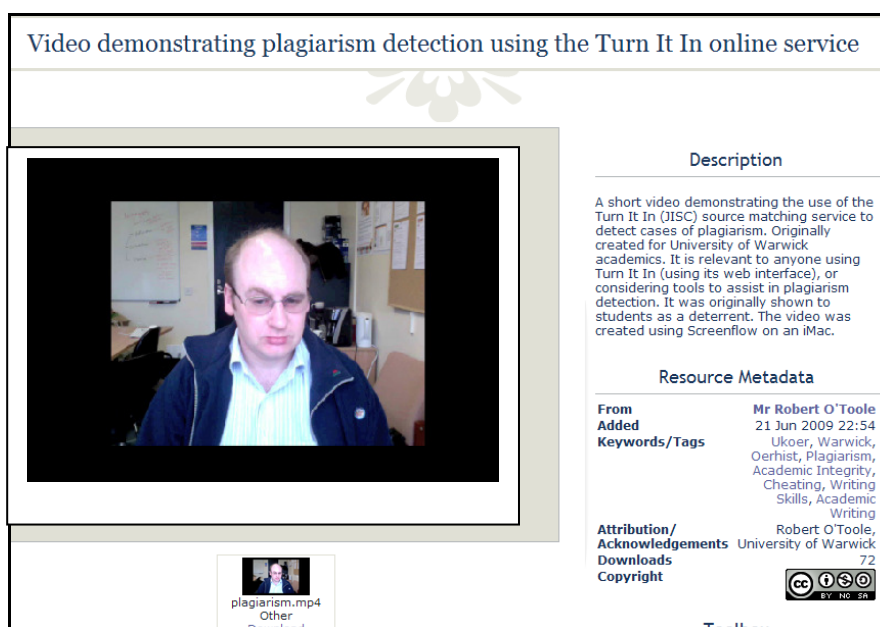


Figure 9: resource #076 skills material on plagiarism

Individual HumBox resources have been added to JorumOpen using RSS feed. In addition, some resources can also be found in iTunesU, and further material is to be added. For example, the University of Warwick has included the material on Georgian Britain on its institutional iTunes account: <http://deimos3.apple.com/WebObjects/Core.woa/Browse/warwick.ac.uk.1744004229>.

## 9.2 Technical developments

The HumBox repository that has been shaped in look and functionality by the Humanities community engaged with the project is fully operational: [www.humbox.ac.uk](http://www.humbox.ac.uk) with the ac.uk URL being acquired midway through the project. Technical development on HumBox went on throughout the life of the project and will continue until the official end of the project on 30<sup>th</sup> April 2010. Much of the development has been done in response to user feedback from the project partners.

### 9.2.1 Look of HumBox

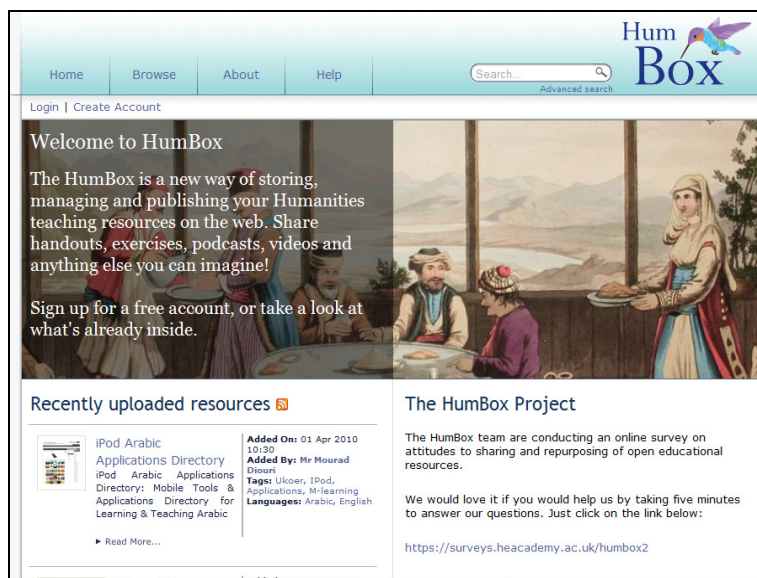


Figure 10: HumBox home page

The look of the site was created with a distinctive hummingbird logo and matching colouring and enhanced by the addition of attractive images drawn from HumBox resources page and the alteration of other design elements such fonts and layout. A 'help' tab was added to the basic repository interface.

### 9.2.2 The profile page

The personal profile page became a key and much appreciated feature of HumBox and as a consequence was upgraded to include a news feed listing a user's recent activities and also showing other activities related to a user's resources (e.g. comments made, downloads).

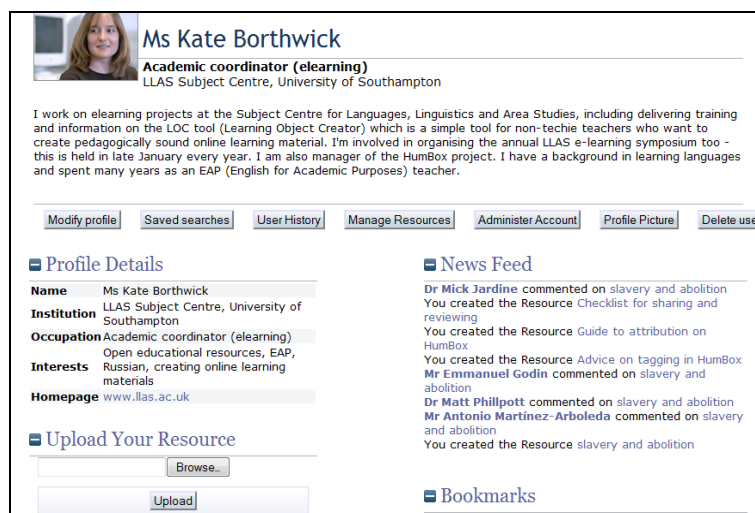


Figure 11: personal profile page showing news feed

A quick upload feature was also added to this page, as was an element of customisability: users can alter the order in which items are displayed on the page, and add/remove areas such as 'bookmarks' or 'collections', see figure 12.



Figure 12: lower half of profile page showing customisation options

### 9.2.3 The resource deposit page

The resource deposit screen was customised for the HumBox project: the mandatory project tag 'ukoer' was auto-filled; the mandatory field 'creation date' was added, and we also added fields for 'institution' and attribution/acknowledgements (fig.13). Help information was also added in the '?' boxes beside each field.

Figure 13: resource deposit screen

Other 'backroom' technical work included: upgrading the site to ePrints 3.2; work on browsing and searching; the implementation and testing of robust features to make bookmarks; to make collections within HumBox; to comment on others' resources; to preview videos, audios and other files in an embedded screen (figures 14a and 14b), and set up email alerts and emailing contact through the site (figure 15).

11. Attitudes towards Regional Autonomy in Spain: The Case of Lorca (Region of Murcia). Video 11 - Summary of Methodology - Transcripts in English and Spanish.

**Description**

Participant 11 responds to the question "How would you feel if the regional parliament and the regional government of the Autonomous Community of Murcia were to disappear tomorrow and all the decisions taken at regional level were to be taken instead at national level? Why?". This video response is part of the collection of learning resources for the students of the Year 2 undergraduate module SPPO 2370/2371 ("Spain: Political Decentralisation and Integration in Europe"), School of Modern Languages and Cultures, University of Leeds.

**Resource Metadata**

**From** Mr Antonio Martínez Arboleda  
**Added** 14 Sep 2009 00:36  
**Keywords/Tags** Ukoer, Oerllas, Political, Decentralisation, Regional, Autonomy, Spain, Lorca, Murcia, Federal, Politics, Regions  
**Languages** Dialecto Murciano, English, Spanish  
**Attribution/Acknowledgements** Antonio Martínez-Arboleda  
**Downloads** 12  
**Copyright**

Figure 14a: video preview screen

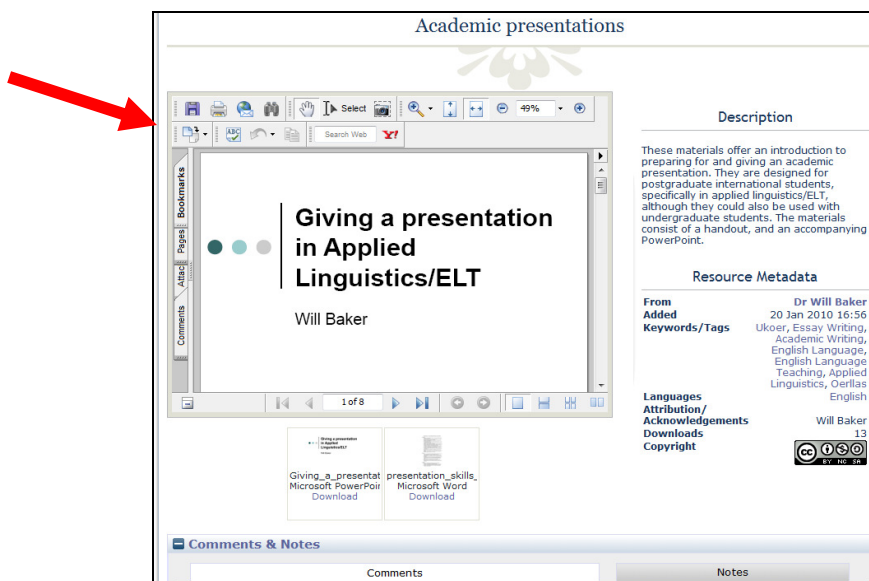


Figure 14b: preview screen for a powerpoint file – the embedded toolbar give users a range of functions including printing and saving directly from this screen

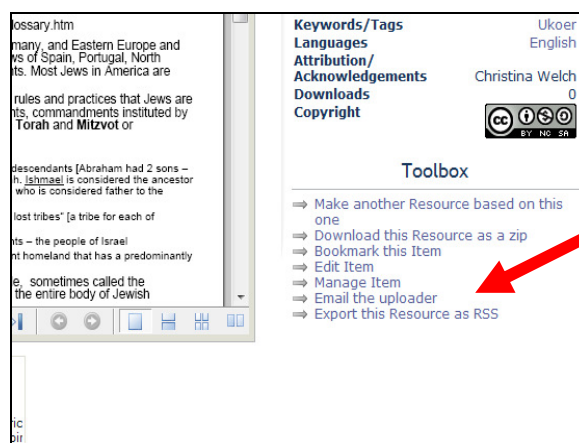


Figure 15: email the uploader/author

The project also added a take-down policy and terms and conditions to the site, which all new users must sign-up to when registering.

### 9.3 Guidance on OER release and associated issues and processes

#### 9.3.1 Help material on HumBox

The project has benefited greatly from having HumBox as an online work space (during the restricted use period in particular) which has not only allowed resources to be uploaded in great number but has enabled project partners to collectively review resources, decide on amendments to the processes and practices involved in using the site, and inform some of the technical enhancements. Having the time to process and review resource metadata and content has enabled the project to devise a series of guidance materials to help new users engage with HumBox effectively. The following guidance can be found in the help section of the site, accessible via the 'Help' tab: <http://humbox.ac.uk/faq.html>:

- Video tutorials
  - How to register for HumBox



- How to edit your HumBox profile
- How to share and comment on resources
- Online copyright helper: advice on copyright and IPR issues using an online workflow
- Guidance documents
  - Getting started on HumBox: a basic guide for new users
  - Advice on good practice in tagging resources
  - Guide on attributing materials effectively
  - Checklist for sharing and reviewing

### **9.3.2 Workshops and meetings**

The final full project team meeting was held on the 25<sup>th</sup> February, 2010, before the official launch of the site. At this meeting, each project partner recorded a video presentation describing their experience and learning from the project. The effectiveness of partner contributions and the level of engagement they have brought to delivering on HumBox resources and project dissemination is evident in these videos. The individual videos of each partner presentation can be found in the HumBox collection: Project Discussions and Partner Presentations <http://humbox.ac.uk/2059/>. The variety of lessons learned, positive experiences and potential they have seen in HumBox is striking, and highlights the advantage in drawing on a range of partners from different institutions and disciplines (for more on this see section 10)

HumBox also hosted a pre-event workshop at the LLAS e-learning symposium, on the 28<sup>th</sup> January, 2010 entitled 'Publishing your teaching resources and enhancing your professional impact.' This was attended by 20 people. Further information and outputs from the day can be found at: <http://www.llas.ac.uk/events/archive/3251>

HumBox hosted an event, in conjunction with EdShare (Southampton's institutional repository), and funded through the JISC benefits realisation programme, on 'IPR and Copyright when sharing Educational Resources'. This event involved presentations and discussions on how institutions could help their academics to publish their teaching resources online. It was attended by about 40 people including legal experts from within the University of Southampton and the JISC, by academics and OER project members. Details of the event and presentations can be found at: <http://www.llas.ac.uk/events/archive/3329>

The Peer Review Workshop held in September, 2009, was instrumental in developing strategies to enhance many aspects of the project, such as the peer-review process, IPR and copyright risk management. The discussions were recorded and edited videos can be found in the HumBox collection: Project Discussions and Partner Presentations <http://humbox.ac.uk/2059/>.

### **9.4 Dissemination outputs**

Dissemination at local and national levels by individual project partners and through the Subject Centre network resulted in over 150 registered users on the HumBox site prior to its official launch. The number is currently over 200.

In addition to individual, personal engagement, a promotional video of partner experiences has been devised (see HumBox collection: Project Discussions and Partner Presentations <http://humbox.ac.uk/2059/>) and the HumBox project has been presented at the following events:

- Open Learning Conference, University of Nottingham, 25<sup>th</sup> November 2009. Slides at: <http://humbox.ac.uk/2095/>
- LLAS e-learning symposium, University of Southampton, 29<sup>th</sup> January, 2010. HumBox presentation at: [www.llas.ac.uk/video/6127](http://www.llas.ac.uk/video/6127)

- 12<sup>th</sup> Annual Teaching and Learning in History Conference
- OER10, University of Cambridge, 22<sup>nd</sup> -24<sup>th</sup> March 2010. Slides at: <http://humbox.ac.uk/2094/>
- Beyond Borders 2010 Conference, University of Oxford, 20<sup>th</sup> April 2010.

The HumBox project will be presented at the following upcoming events:

- Higher Education Academy Conference, University of Hertfordshire, 22-23 June 2010
- Languages in higher education 2010: raising the standard for languages, University of Southampton, 1-2 July 2010

#### **9.4.1 Publicity materials**

The project team have created a number of publicity materials: a poster for use at conferences/events promoting the HumBox; a set of 4 postcards featuring images taken from the HumBox; a leaflet describing project aims; a large paperclip-style bookmark with the logo and URL, and a limited edition mug. Articles about the project have appeared in literature from all four Subject Centres:

LLAS: Liaison Magazine: [http://www.llas.ac.uk/resourcedownloads/179/liaison\\_jan10.pdf](http://www.llas.ac.uk/resourcedownloads/179/liaison_jan10.pdf)

English: WordPlay magazine:

<http://www.english.heacademy.ac.uk/archive/publications/magazines/wordplay2.pdf>

History Subject Centre newsletter:

[http://www2.warwick.ac.uk/fac/cross\\_fac/heahistory/publications/winter2009](http://www2.warwick.ac.uk/fac/cross_fac/heahistory/publications/winter2009)

Subject Centre for PRS journal: <http://prs.heacademy.ac.uk/publications/discourse/spring2009.pdf>

### **9.5 Outputs from the evaluation process**

The key quantified evaluation tool used was a survey conducted amongst the partners at the beginning and end of development of the HumBox that was intended to capture attitudes to sharing, reusing and repurposing resources, conducted using Bristol Online Survey: <http://www.survey.bris.ac.uk/>

After the official 'soft launch' of the HumBox the survey was opened to general users of the resources and included a section that covered use of the HumBox itself. The baseline and change survey results are available to download here:

[http://www.llas.ac.uk/sites/default/files/humbox/HumBox\\_data.xlsx](http://www.llas.ac.uk/sites/default/files/humbox/HumBox_data.xlsx)

The reporting from partners forms a significant aspect of the evaluation of this project. Given the community and humanities culture focus of the project the vast majority of the evaluation of this project is in qualitative feedback. Rich and detailed feedback was collected from the participant partners in the video presentations made at the final reporting meeting (see section 9.4.2).

Additionally partners were asked about the pedagogical value of 'raw' resources and how they might be developed but further comparison data has not yet been collected (explanation below).

#### **9.5.1 The surveys**

"Having contributed material to HumBox I look forward to monitoring how this gets used (if possible). I also intend to explore HumBox for teaching I conduct in my subject disciplines and see how much effort it takes to repurpose these. I should also like to acknowledge the source of material I reuse and wonder if HumBox can offer (or indeed already does) offer guidance on this to users." *HumBox partner.*



“The project has been an unmitigated success bringing together professionals across the humanities to consider the most effective way of sharing and reviewing resources. I think we will probably need to revisit the reviewing procedure once the community has grown in size. I also think we will need to work hard to spread the word to maintain the momentum.” *HumBox partner*.

Participants were asked about:

- their impressions of the reusability of resources in the humanities generally;
- their own attitudes to sharing;
- their attitudes to reusing other’s resources in their own disciplines;
- their attitudes to reusing resources from the humanities more generally.

Each question was subdivided by resource type:

- reading lists and bibliographies
- lectures and seminar materials – e.g. notes, summaries, handouts
- assessment materials – e.g. set essays, marking schemes, multiple choice questions, set projects
- multi-media resources – e.g. PowerPoint presentations, audio-visual materials, sound and picture collections
- on-line materials – e.g. websites, interactive media, databases of resources

The follow up survey also included a second section about use of the HumBox itself covering submission of resources, download and use of resources, and future intended engagement with the HumBox.

The results speak largely for themselves. Across the time scale of the project some key features are:

- recorded attitudes to humanities reusability showed an overall reduction in those who thought resources could not be reused at all, and a movement towards adaptation as the preferred form of use;
- attitudes to sharing in real practice did not change significantly over the course of the project, starting from a high base in the initial survey, except in multi-media where again there was a movement to sharing without adaptation (57% of respondents compared with 32% at the outset);
- reusing resources made by others within specific disciplines also showed considerable movement in attitudes to multi-media with a shift to adaptation as the preferred mode (71% compared with 55%);
- there was little change in attitudes to reuse in the humanities more generally, although it should be noted that out of the whole project it is only in the categories of ‘lecture notes and seminars’ and ‘assessment materials’ as reusable objects that more negative results were noted.

From this we conclude that the project has started to show divergence in attitudes to resource types over time, indicating, we suggest, a development in more nuanced and subtle approaches to what might and what might not be appropriate resource for open sharing in the humanities. Clearly the HumBox has encouraged significant changes with regard to multimedia and presentation type resources, which find increasing use in lectures and seminars. Attitudes to sharing and reusing the more ‘formal’ parts of the teaching process showed less movement over the course of the project, as

might be expected; but clearly there is room for future development in understanding how these difference in types of OERs are perceived and accepted within the humanities context.

In the second part of the second survey there was not a great deal of time to assess the wider use and perception of the HumBox from its launch to the close of the pilot at the end of April. However, early indications are that resistance to OER remains around two key points: loss of control over teaching materials, and quality and standards in terms of the materials shared and their tagging and cataloguing. Clearly there is still work to do in supporting development of community attitudes in these areas, and a longer-term review of the open tagging policy in HumBox will need to be undertaken.

### **9.5.2 Other Evaluation**

Data has been collected on the perceived pedagogic value of a sample of resources submitted in the early development of the HumBox. It had been hoped that comparison data would be collected at the end of the pilot to allow perceived improvements in the pedagogic value of the resources through reviews, collections and commenting to be assessed. Unfortunately, the success of the HumBox in attracting a large number of resources has made this analysis difficult to make since the sample has become a vanishingly small part of the total number and has therefore not received attention from reviewers in the way that was anticipated. The baseline sample data will be retained by project for future use in longer term study.

## **9.6 Lessons learnt**

The lessons learnt can be considered under two broad headings: those arising from the overall approach taken and the nature of the humanities' engagement with OER through the HumBox; and those relating to the administration and management of the project. However, we can relate the majority of our learning to the evidencing of the key role of discipline specific academic identity for taking OER beyond a pilot phase in the humanities.

We started out with the premise that it would only be through recognisable academic practices that engagement and success would be achieved in this project. We strongly believe that this has been borne out through all aspects of the project where this was a significant factor: in dialogue and innovations in the projects with partners; in stressing the peer-'review' and resource development of the HumBox; in providing facilities to allow academics to showcase part of their own teaching portfolio through engagement with HumBox; in feedback from and to the community of users; and in the management of the project.

### **9.6.1 The Humanities and OER**

- The most significant learning from this project is that once a sense of joint ownership of both resources and enhancement processes is developed through promotion of recognisable practices and identities, humanities academics and practitioners are capable of great success in sharing and reusing learning resources. As our evaluation data shows, there are indications that there was a general movement to modified and adapted use of others' materials over the course of the project. This is what would be expected as creative and new ways of developing teaching, which genuinely embeds open resources, becomes more acceptable. Since academic identities are significantly shaped by disciplines, **the HumBox demonstrates that if OER as whole is to succeed in bringing about change in academic practice and culture it can best be achieved through discipline orientated approaches.** This is particularly true in the humanities where tolerance of critical and creative conceptual innovation is high compared with other disciplines and therefore requires open approaches to the collection, cataloguing and reuse of resources in a community context. Only through this approach can institutional culture and policy change be achieved.

- We know from the evaluation feedback that some users of the HumBox question the sustainability of the diversity, suitability and quality of resources, especially new ones deposited once the pilot phase is complete. Although we have medium term sustainability build into the project, it is clear that longer term development of such a dynamic system does require commitment to development of the embedded community work HumBox has evidenced. That is, a pilot project, no matter how well resourced, is unlikely in itself to produce longer-term institutional, policy and cultural change without commitment at all levels of academic engagement: in funding, in institutions, within disciplines and sub-disciplinary communities, in departments and faculties. **The cultural changes necessary need coherent commitment of resources across all levels for a longer period.**
- Enthusiasm from the partners for OER as a concept was high and, overall, grew substantially during the course of the project (see the final report presentations, detailed in section 9.4.2). However, where partners were more isolated in terms of the numbers from their discipline there was some concern about the development of the value-added aspects of the HumBox. For example, for the majority of the project there was only one department specialised in religious studies and this meant that expert feedback on those materials was perhaps less well developed than for other disciplines. This further illustrates the need to build communities around already existing networks and practices. We conclude that **OER projects that are discipline specific should always ensure that no discipline is represented by single partners to ensure greater engagement and embedding of shared teaching contexts and expertise in resource development.**
- During the course of the HumBox project the nature of what success would look like was enhanced from earlier models around the numbers of deposited resources and a workable system for community communication and peer-review, to a broader idea of engagement with value and reuse of resources with pedagogical development. We evaluated and monitored the pedagogical value of resources and how this developed. Partners noted in their final presentations that they had begun to think about what humanities teaching resources written specifically for sharing might be like; and how the idea of what good discipline-specific OERs look like had progressed. The lesson here is that even a short project such as HumBox can change *thinking* about OER in a positive way, but also opens up dimensions of practical and conceptual pedagogical engagement that could not be foreseen at the outset: **OER, in changing practices, develops thinking about *teaching* more generally, which requires future support and recognition in project work to tie in with the development of pedagogical frameworks in educational research.**

#### ***9.6.2 Administration and management: managing future projects better***

- In looking at how the partners engaged with the project one of the most significant features that challenged the coordination of resources, support and feedback for the management team was the disparity of level of engagement with the project. A schedule of resource types mapped to quantity had been considered sufficient to guide how partners would be compensated for time and effort in preparing material for the HumBox. However, while one partner (Sheffield) contributed over half the total resources held and helped in significant areas of reviewing, meeting arrangement and supporting discussions and learning, others only met the agreed standard minimal engagement. The team debated how this could be accommodated as the project proceeded and were able to provide additional funding for the extra work; but there is clearly scope for moving beyond a simple quantitative model of engagement based on input for future project work of this sort. Had more time been available in the initial bidding process a much more comprehensive and nuanced structure for how

partners' necessarily variable input and engagement could have been drawn up. We feel that **future OER projects will need to develop better tools for measuring and rewarding project engagement, which recognise diversity beyond merely quantifying time/resource provision.**

- The project team used Web 2.0 technologies and tools from the beginning, alongside those used by the OER project overall, to manage the HumBox project: the bid was written via a wiki, meetings were conducted using Skype (although this was not always without difficulties) and other networking tools, a blog tracked some levels of engagement from partners, and the HumBox itself contained social networking tools. From this we conclude that **long distance project management is possible across a dispersed network of sites using a range of affordable Web 2.0 and social networking approaches.** Greater planning time at the initial bidding phase would have allowed investigation of more formally embedded techniques.
- **Risk management for OER IPR is manageable and more appropriate to academic contexts.** The decision to pursue a policy of managing risk through the Creative Commons licence, user guides, agreement of self-checked resources and a “take down” procedure for perceived problems, has, to date, proved to be a wise one. A great deal of time could have been taken up with securing legally evidenced guarantees of IPR on each resource collected. However, as with other aspects of the course, a better fit with real academic practice in the humanities was found through our risk management model. We recommend this for future work.
- The project was not without some issues around control over the development of the technology, given that this was supported through existing structures at the University of Southampton. In future work of this sort, clearer line management structures should be sought.

## 10. Outcomes and impact

The key outcomes of this project were as follows, including a comparison to the situation at the start of the project. Their impact is described below:

### 10.1 Outcomes matched to aims and objectives

Aims	Outcomes
Access to at least 400 peer-evaluated digital resources for the humanities in a variety of media	Access to 1000+ digital resources in a variety of media; a significant number reviewed; number increasing daily
Create a trusted and sustainable repository	<p>Creation of working repository</p> <p>Definite sense of shared ownership of the project outcomes – the HumBox shaped by partners comments, content of repository owned by the community</p> <p>The look and openness of HumBox is appealing to users; it is a showcase for the Humanities in the UK</p> <p>Understanding that HumBox acts as a shop window for an institution or individual</p> <p>The HumBox team have been approached by others wanting to use HumBox as a potential host of materials from smaller, single discipline repositories which are struggling to achieve critical mass.</p> <p>Sharing across Humanities has enabled a critical mass of resources to be collected which are exposed in Google searches and give the repository credibility – it looks and is active.</p> <p>Dynamic nature of repository gives users ownership over the site</p>
To create an expanding national community of Humanities 'sharers'	<p>200+ registered users on the HumBox site and growing</p> <p>Established a clear sense of community for the project and an interest in sharing ideas and resources across disciplines</p>
To embed a culture of shared educational resources across the humanities and raise awareness of OERs	<p>Process of sharing across the humanities initiated and active in HumBox; numerous local and national events have raised awareness of OERs</p> <p>Greater understanding of the value of 'unfinished' or 'work in progress' resources – for enhancement by others.</p>

	<p>Greater understanding of OER and online resource sharing – what constitutes a learning resource, how should it be described, the potential for students and the wider public</p> <p>Research active staff see the benefit as a showcase for research, teaching staff see it as enhancing their status as teaching-only staff</p>
To meet the need for a light touch process of peer review and quality enhancement in the delivery of shared learning resources	<p>Process of commenting and reviewing in place and guidance documents produced</p> <p>Greater understanding of the peer review process for OER achieved, i.e. that it is not the same as for other areas of academic work but has an emphasis on positive reflections on the potential of learning resources for reuse and repurposing in different contexts.</p>
To provide solutions to practical obstacles inhibiting the sharing of resources	<p>Production of guidance materials on copyright, IPR, tagging and metadata and technical issues – all created using feedback from project participants</p> <p>Exploration of 'fears' around IPR, misuse and negative criticism of resources published for open sharing.</p>
To create a robust model to sustain HumBox into the future	<p>Critical mass of resources achieved to encourage future users to participate</p> <p>Active community engaged in sharing and reviewing resources</p> <p>Technical features to foster community-building in place (comments areas, profile page, new feed for users)</p> <p>Benefits of sharing appreciated and understood by core community (project partners and their colleagues)</p>

## 10.2 Impact

Most of the impact from this project has been measured through qualitative means such as the interactions on Basecamp, the high level of engagement of partners with OER and the process of community building, the commitment to HumBox and the project, and most significantly, the end of project partner reports and related feedback.

### 10.2.1 On individual project members

Impact	Evidence
Professional development and learning new	"I've integrated it into my teaching already. I've done

skills	<p>some sessions on Web 2.0 and open educational resources, so my knowledge has been passed on both at undergraduate and Masters level in my teaching.” (<i>Billy Brick, Coventry</i>)</p> <p>“It’s very pleasant to be able to exchange ideas with people you’ve never met before [in your subject area]” (<i>Emmanuel Godin, Portsmouth</i>)</p> <p>“An amazing voyage of discovery and we’ve learnt a lot from the whole project” (<i>Michael Jardine and Matthew Sauvage, Winchester</i>)</p> <p>Project members were exposed to new pedagogical and technical practices through analysing and reviewing the resources of others</p> <p>Project members improved their own resources or metadata on the basis of reviews and comments received (see report from Emmanuel Godin, Portsmouth)</p> <p>Project members became ambassadors for the project</p> <p>Sarah Hayes (Aston) has had a paper accepted for the next EUNIS conference based on research associated with HumBox project communications</p>
Linking research and teaching	<p>Presence on HumBox of research materials used in teaching.</p> <p>Engagement of project partners who are all research active</p> <p>HumBox “enables colleagues who are engaged in research to open their research-led materials to the wider community.” (<i>Antonio Martínez-Arboleda, Leeds</i>)</p> <p>Using HumBox seen as a way of demonstrating impact as a researcher, too: “Researchers at Portsmouth have seen that HumBox is a fantastic way to share their research, and to build an impact” (<i>Emmanuel Godin, Portsmouth</i>)</p>
Raised interest in OERs in general and greater insight into the OER publication process	<p>“...it’s developed my interest in OERs, and I’m thinking of applying for a SCORE fellowship...so it’s had a personal impact on me” (<i>Billy Brick, Coventry</i>)</p> <p>Feedback from project partners informed the development of guidance material on how to use HumBox; on metadata and tagging, and peer review</p>
Encouraged reflections on impact of teaching	Project partner Antonio Martinez-Arboleda wrote a

within the new REF framework	<p>response to the REF consultation based on his work on the HumBox project and made OERs part of his institution's departmental strategy plan. He feels OERs have potential as a factor in the promotion process.</p> <p>Active use of profile page to show professional interests and deposited resources</p> <p>"Researchers at Portsmouth have seen that HumBox is a fantastic way to share their research, and to build an impact" (<i>Emmanuel Godin, Portsmouth</i>)</p>
Opportunity to publish teaching work, seeing the worth of teaching in a new light and be recognised for it	<p>Project partners can see the number of views and downloads of their resources which gives personal satisfaction</p> <p>Contacts from UAE made with Winchester colleagues as a result of seeing their resources on HumBox</p> <p>Request for "similar material" made to user, Dr Sarah Richardson (Warwick), after her History podcasts were found and used</p>
Influencing the development of HB repository	<p>Project partners influenced the look and feel, and the functionality of the HumBox repository</p> <p>"We feel a certain ownership over it [HumBox] already..." (<i>Sarah Hayes, Aston</i>)</p>
Re-assessment of notions of quality in OERs	<p>Feedback from the peer review workshop indicates that partners have re-assessed how their teaching materials might be useful to others, and realised that it could be in ways (technical, pedagogical or content) they have not anticipated. Partially-completed material also has value in this context.</p>

### 10.2.2 Impact on technical community

Impact	Evidence
Influence of repository design on other systems	<p>The HumBox user community has influenced the documentation and development of new features in ePrints (e.g. SNEEP, previewplus and MePrints – these features are now offered to commercial customers as part of ePrints services).</p> <p>HumBox is used as an exemplar in ePrints training sessions</p>
Influence on wider technical community	<p>Members of the HumBox technical team will present on the technical aspects of the site at</p>



	<p>OR10, in Southampton</p> <p>HumBox technical team (based at ePrints) has presented at two recent CETIS events on repositories and Web 2.0</p>
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### 10.2.3. Impact on a department/institution

Impact	Evidence
Bringing colleagues together through resource collection	<p>"...it's all too sad in today's academic world...academics are often very isolated working alone in their offices. For us [at CRCEES], HumBox has been a breath of fresh air....it's really brought people together and brought for us a tremendous spirit of enjoying what we do." (Margaret Tejerizo, Glasgow)</p>
Engaging research staff with teaching	<p>"HumBox has been important in my institution in paving the way for OER, elearning more broadly, changing attitudes to learning and teaching...." (Michael Jardine and Matthew Sauvage, Winchester)</p>
Raising the profile of the host dept/institution of participants	<p>Partners have particularly focused on this when discussing OER with senior managers and requested 'permission' to create profile pages for their institution</p>
Influencing departmental processes	<p>Antonio Martinez-Arboleda (Leeds) has influenced the inclusion of OERs as part of his departmental strategy plan. He feels that engagement with OER can demonstrate professional excellence and is an enthusiast for this concept within his institution.</p> <p>There are 6 departments at Southampton, where LLAS is based, involved in OER projects, and we all joined with the EdShare (institutional repository) team to collaborate on an event looking at copyright and IPR for OER. The event was attended by Southampton legal and academic colleagues and our dialogue as a group continues, with a view to shaping Southampton's institutional policy and support for academics on OERs.</p>

### 10.2.4 Impact on the Humanities community

Impact	Evidence
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Getting colleagues out of their discipline silos	"I find myself travelling on HumBox looking at subjects which are nothing to do with mine...it's an inspiration" ( <i>Emmanuel Godin, Portsmouth</i> )
Creating an identifiable community for Humanities (based around teaching)	<p>"HumBox reflects the variety of approaches to learning and teaching that co-exist, live together, in the UK Higher Education sector" (<i>Antonio Martinez-Arboleda, Leeds</i>)</p> <p>"The message from my colleagues is that they will continue to use HumBox...it will be their first port of call [for humanities resources]." (<i>Julie Watson, Southampton</i>)</p> <p>"HumBox has encouraged all kinds of people, including early career and well established academics, to create new resources that are designed for sharing." (<i>Rob O'Toole, Warwick</i>)</p>
Facilitating cross-fertilisation of teaching ideas across the Humanities	"I certainly think that such shared resources are going to increase and I would hope it leads to more sharing of academic resources, in the end it benefits all of us as we have a wider peer group to share resources with" ( <i>Julie Watson reporting on feedback from Humanities colleagues, Southampton</i> )

### 10.2.5 Impact on OER

"I think we've proved as a group that OER sharing is possible" (*Sarah Hayes, Aston University*)

This can be described as follows:

Proof of concept – community sharing can be achieved through a bottom-up approach which encourages rather than requires sharing. Academics appear to be more willing to share than anticipated but are most enthusiastic through close engagement in the process through their academic/teaching interests, their inclusion in the sharing space and their ability to interact with it. There may be lessons here for more generic sharing communities such as Jorum and it is hoped that this may be a major benefit of this and similar projects.

Community sharing is a very different concept to institutional sharing which is often top-down, regulated by the institution rather than the sharing community and more vulnerable to legal lock-down and to the need for high-quality, 'perfect' materials. However, a significant issue for a sharing community is who hosts the materials and where and how it is hosted (currently the HEA or JISC could do this) in the long-term. Who monitors it (HumBox will be mainly community monitored although the host institution will have full admin rights and will need to respond to requests for take down or reports of misuse. This is a long-term issue and could have an impact on the future of smaller repositories unless they are tied together (co-hosted/interoperable) in some way. It would be a shame to have identikit community repositories as identity is quite significant in terms of engagement but finding solutions which use common core metadata and single upload tools would be very helpful.

### 10.3 Critical success factors

**Some critical success factors identified for the project are:**

#### *Enthusiasm of institutional project partners*

The collective efforts of the institutional project partners were key to the success of the project in that through their individual commitment to the project and, therefore to OER, they were not only able to contribute their own materials but to motivate their colleagues to contribute as well. The feedback from partners was truly inspiring and it is clear that what they put into the project was rewarded in equal measure by the benefits they gained.

#### *Building on experience*

The experience of the Subject Centre management team was invaluable as a resource on which to build the project. Each consortium partner has 10 years of experience in working with academic colleagues within their discipline area(s) and was able to use this to select partners, manage the day-to-day business of the project and organise activities to support and reward the colleagues involved.

#### *The 'Project Factor'*

The very existence of a project helped to unite people around a common cause and give a focus and purpose for engaging in open sharing. Having a clear focus and method for OER release acted as a solid framework for getting started

#### *The focus on the discipline community*

The importance of the subject dimension cannot be overstated in that it was the provision of a bespoke space for the humanities which appeared to cater for the particular needs of humanities disciplines (even though some of these might be generic across subject areas) helped to engage partners in the process and gave them a way into discussions of OER with colleagues new to ideas of sharing.

#### *Having proven technology in place*

A key benefit of having a 'repository to go' meant that the project could initiate the immediate deposit of resources so that the HumBox could act as a test/'proof of concept' site for the uploading, editing, evaluating reviewing and repurposing of the resources. Seeing a repository in action and being able to publish and review one's work was considered to be a key motivating factor in maintaining partner interest and engagement.

### 10.4 Critical barriers to achieving impact

Potential barriers to sharing were well-known to the project team due to previous work carried out by the Subject Centres involved in HumBox (see section 5). In considering barriers to achieving impact some of these well-known barriers to sharing are also those which potentially impede impact for OER in general. For example:

- Not invented here syndrome
- Protecting the crown jewels
- Work not of 'publication' quality
- Concern about copyright and IPR

Indeed two of our partners commented that: "...in order for the full potential [of OER] to be realized clearer guidelines and protocols may need developing to alleviate competitive anxieties and best practices in layout and organization of resources." (*Mick Jardine & Matthew Sauvage, Winchester*)

Although these issues came up in the HumBox project and were not entirely resolved by the end, they were directly addressed in the course of the project through the work carried out on copyright, the re-evaluation of peer review, the consideration of ways in which materials might be adapted rather than used 'off the shelf' and so forth. Clearly the main recipients/creators of the messages relating to the benefits and impact of OER were those who were directly involved in or who closely engaged with the project. However in much of the advocacy work carried out by institutional partners, strategies to overcome barriers provided valuable lessons (and outcomes for others). Namely that different messages need to be created for different stakeholders, i.e. talking to teaching colleagues about OER may stress research-teaching linkages or personal profile, while messages for senior managers will focus on institutional/departmental profile and recruitment. It has since been reported that the University of Leeds, School of Languages, has added OER as one of the key points of its Learning and Teaching Strategy as a direct result of this project. However beyond the project team there is still much work that needs to be done and getting the right message across is a key challenge for the future impact of OER.

Another potential barrier to impact is the place of the subject community repository within the OER landscape. Such repositories have proven to be a powerful means of creating active engagement with OER and have many benefits for individuals, disciplines and institutions. However, they could be viewed as sitting outside institutional and national repositories such as JorumOpen and currently the resources they contain can only be released to repositories such as iTunes U, if the author institution approves upload. This could mean that in the long-term finding a home for such repositories (currently the HEA Subject Network provides an ideal home) and supporting their ability to 'talk' to other repositories presents a challenge for the longer-term presence of such repositories. Having said this, there is no doubt that academic subjects act as a key route to OER and this should be built on in future repository initiatives.

In terms of the technological aspects of the project, it should be noted that while HumBox was a pilot project, it could reasonably be expected that users should tolerate some technical deficiencies and uneven metadata. Looking beyond the pilot phase however, these may constitute a barrier to impact in that HumBox will need to compete with institutional and other repositories where quality control is fully resourced.

## 11. Conclusions and recommendations

As has been stated elsewhere in this report the project has met and at times exceeded its aims and objectives. It has populated its own repository (and also JorumOpen) with in excess of 1000 resources and has succeeded in adding over 200 subscribers to the HumBox. More importantly it has created a team of humanities academics who have become committed to OER and have proved to themselves and to others that open sharing of teaching resources is a personally and professionally valuable activity.

The specific conclusions and recommendations that can be drawn from this project are as follows:

### **a) Humanities academics are willing to share their teaching resources**

It would be true to say that the HumBox project partners were relatively new to the concept of open education resources and in many cases to the concept of online learning and/or repositories. They were approached by the project consortium partners (the four Subject Centres) as they had engaged in a variety of ways, not necessarily relating to e-learning, with their respective centres prior to the project. This approach was based on tried and tested methods for engaging with the academic community that have been used very effectively by Subject Centres over the last ten years. During the course of the project the partners became much better informed about OER and were transformed from 'naïve' sharers to 'smart users of the HumBox repository uploading and commenting on content. Indeed the group became so engaged with the project that they became co-creators of it, informing its development through their user feedback. In addition their advocacy of OER, through their active promotion of HumBox has given it academic credibility. It is also of note that through HumBox, partners and their colleagues were able to see and to make strong linkages between research and teaching. For example, through the profile page partners are able to describe their research and teaching interests. Also, as reported by one partner the colleagues, who most closely engaged with OER, were those who were research active and saw it as a means to present the ways in which they incorporate their research into their teaching. Finally, a different partner began to reflect on the ways in which OER might contribute to the broader concept of impact within the new research framework. It is, therefore, a testament to the project that by the end of the project the partners had not only engaged with the idea of OER but had become enthusiastic champions of the HumBox approach to open sharing:

"An amazing voyage of discovery and we've learnt a lot from the whole project"

*Recommendation 1:* Further support for OER champions in the Arts & Humanities who can continue to engage their colleagues with OER and further enhance the HumBox collection

*Recommendation 2:* Further exploration and articulation of the links between research and teaching in OER

### **b) OER can be successful when approached from a *subject* perspective**

OER publication at discipline level, as embodied in HumBox, appears to be qualitatively distinct from that taking place at national or institutional level. It is largely bottom-up, community-driven, based on individual reputation and engages its audience through a common interest in a particular discipline or disciplinary field. In the case of HumBox, it is at the level of teachers as well as learners and the wider public, thus responds to a teaching as well as a learning agenda. Quality issues (see below) are based on learning potential rather than 'polished perfection' and the community will take an active role in monitoring this through an iterative peer review process. This community or subject approach is complementary to other approaches as it is an effective means of engaging the authors of OER materials with the process of sharing – through a focus on the benefits to them and their discipline as

well as to their students, institution and the wider public. What has emerged quite strongly in this project is the way in which this progression from an individual to a collective motivation for sharing has come about in a very short space of time. Partners' reports emphasise very strongly the ways in which personal engagement has evolved into considerations of teaching and research linkages, institutional profile and engagement, direct use of resources by students and ways in which wider public appreciation of particular discipline areas (e.g. Czech cultural studies) can be effected through open sharing. This effectively demonstrates that institutional and national initiatives for open sharing might draw on these outcomes to better engage subject practitioners (often the authors of open content) with the process of open sharing.

*Recommendation 3:* Institutional repositories consider approaches to OER that support individual and subject community engagement with open sharing

*Recommendation 4:* JorumOpen to support further work to bring subject practitioners into open sharing which includes technical solutions to support and link subject repositories to the national repository

**c) Quality issues can be re-evaluated whereby peer review adds value to the resources and polished perfection is not the main priority**

At the outset project partners in the Humanities were concerned about issues of the quality of open content resources. This mainly appeared to relate to concerns that resources taken out of context might be ill-judged, might not be innovative or would not have benefited from publication level review and editing. Partners were invited, as indicated by the OER programme guidelines, to submit resources that ranged from lesson plans, bibliographies, powerpoint presentations to whole modules and courses. The former was where HumBox drew the majority of its resources so it became clear early on that quality had to be reconceived as less about a finished product and more about pedagogic method, content and/or technical innovation. Thus the early notion of peer review was re-oriented towards a system of commenting on a resource, not to critique it but to add value to it in terms of its value (according to one or all of the categories above) in a teaching & learning context. So a lesson plan might contain a useful idea on how to put together a session building student skills or knowledge in a particular area, a powerpoint or lecture notes might provide subject content or a multimedia learning object might demonstrate technical innovation. More time would be needed to further explore the willingness of HumBox users to contribute comments but to date the project has found that this facility has given rise to small dialogues between commenters and authors and that comments on resources actually enhance the resource itself (one partner found that the comment on his resource was an improvement on his own resource description).

*Recommendation 5:* further exploration with existing partners and new HumBox users of the actual use, re-use and repurposing of content

*Recommendation 6:* long-term monitoring of HumBox comments to evaluate more fully the ways in which they can/do enhance resources and report on reuse etc.

**d) Copyright and IPR problems can be overcome**

This is an area that is frequently unclear or even ignored by many authors of teaching materials, but when raised is one of great concern. Thus raising awareness of the potential risks of infringing copyright or IPR was an important part of the HumBox project which highlighted the need for more training in how to understand and manage copyright issues for those on the frontline of OER, which in the case of a community repository is the author or uploader of the resource. In initiating dialogue between content providers and legal managers HumBox supported an important step forward in shifting the discussion away from copyright do's and don'ts towards strategies for managing the real risks of OER in this area. It was clear from an early stage that for each partner their institutional context might have an impact on whether they could or couldn't share their resources. It was

encouraging to hear from the project's host institution that it would not enforce its ownership of the IPR of all teaching resources and it would be very helpful to hear from other institutions that this attitude was one that is shared across the sector. Some practical (rather than strictly legal) advice was produced to support OER authors and uploaders, based on the work of another (OOER) subject project working in the area of Medicine and Dentistry. What became clear from this collaboration is that copyright and IPR does have different implications for different subject communities and any guidance produced needs to reflect this and be targeted at supporting non-experts in this field. Finally, this project found that not only does copyright law continue to lag behind technological change, but it remains woefully unclear in a key area for teaching and by implication for OER, that of fair dealing. For now, the only fair dealing exception relevant to OER is that of 'criticism and review' which is exceptionally unclear and open to individual interpretation. HumBox spent some time on a particular example of this in the repository which was deemed risky by one legal expert while being passed by another. Fortunately this was something of a one-off case as a thorough examination of the contents to date by the project copyright officers has revealed that there is little within the repository which is problematic in this area. Thus an initial fear that humanities authors routinely infringed copyright (for pedagogic rather than cynical reasons) proved to be largely unfounded. This may, in part, have been a consequence of the copyright training that was offered but may also reflect a higher awareness of appropriate use of third party resources than initially assumed by the project team.

*Recommendation 7:* Greater openness and dialogue between institutional legal teams and resource authors

*Recommendation 8:* More training (possibly virtual) for resource authors in the management of copyright and IPR risks and for resource authors on 'creating to share' and on how to use share-alike licences

*Recommendation 9:* That future OER work be focussed on 'creating to share' which enables authors to address any copyright or IPR issues at the point of creation rather than uploading

*Recommendation 10:* There could be further lobbying for change or clarification of copyright law in respect of OER

## 12. Implications for the future

### 12.1 Looking to the future

It has been made clear, elsewhere in this report that OER publication within subject communities very definitely does have a future. There is still some way to go, but in just one year, a functioning repository containing over 1000 items has been built through the efforts of a small team based in UK HE. Feedback from participants has been overwhelmingly positive in respect of OER and this has largely come about through engagement with the process from a disciplinary and teaching perspective. Indeed the project has exceeded expectations in many areas (including number and quality of resources) and it has set the foundations on which a growing community of sharing can be built. As for the HumBox repository itself it provides an excellent technical solution for the project and has built up a strong following in the user community, but it will need to keep pace with technical innovations in information management if it is not to lose this 'customer base' that the project has worked so hard to build up.

Looking to the future the growth of this community will depend on the continued support (technical and academic) for the HumBox repository over the short-term – to consolidate the community of practice committed to OER – but most importantly it will need to ensure that it keeps up the momentum for sharing that has been built up over the lifetime of the project. The continued existence of the Subject Centres is one of the keys to maintaining the impetus for subject practitioners to join the sharing community for humanities (and indeed other disciplines engaged in open sharing). Continued hosting of the repository and ongoing dissemination of the HumBox message will continue as part of the annual programme of activity for the Centres concerned. In addition, it is clear that many of the institutional partners who have worked on the project will continue to act as champions for OER in the humanities and they have access to a wide variety of dissemination routes within their institutions and the broader subject community. A recent message from one partner confirms this as she reports on feedback relating to the future impact of HumBox received from colleagues in her institution:

"I find this a very interesting, exciting initiative and I'm looking forward to it moving forward in the future"

"We would be very interested to get some feedback one day on how people have enjoyed our resources"

In addition she comments that:

"We have found that the OER approach through Humbox, together with the range of other tools we use on the Web, are giving us much more of an overview of our research and teaching, the possibilities for recognition, impact and collaboration are very exciting and further funding could progress this research."

These quotes, therefore, point to the main areas of focus for the future of this and similar OER projects, namely:

- keeping lecturer participation alive through continued dialogue within and outwith the HumBox repository/community
- concerted follow-up to track how and why resources are downloaded, reused and/or repurposed by teachers and learners, and whether licensing or technical issues affect sharing.

Therefore the view from this project is that subject-based OER does have a great future ahead of it but would benefit in the short-term from support for consolidation and enhancement of the sharing



communities they have created and in the longer-term for research into how OER resources are viewed and used within those communities.

## **12.2 From the coalface: the future in the words of the community**

It is the community who should have the last word on its own future so, in their own words:

“It is very important for us to continue to work from ‘where lecturers are’. Mapping the contexts in which lecturers use resources/repositories/web 2.0 applications, the activities and the range of places people go on the web and why will help us to understand what is valued.” *(Sarah Hayes, Aston)*

“To build on the implementation phase, HumBox must be used. This is where future work lies. Users, use and user communities must be built on and monitored for future development of the resource.

Possible projects would include:

- The setting up of results-focused research and/or L&T community, or group of communities, using HumBox as the procedural tool and the communication and dissemination portal for this. The effectiveness and efficiency of the resource for these specific purposes can then be quantified at the same time as its users and communities grow.
- Targeting promotion of the resource among early-career academics, who represent its future. This could be done with the development of a set of generic training sessions that would fit well into any HEI staff development programme.
- Developing an increased awareness of the relevance of OER contributions to academics’ research profiles and devising tools/functions within the OER software that will provide scope for its inclusion in the HEI research agenda.
- Finding out exactly where learners fit in to the OER equation and how it can best benefit them. This appears to be the missing cog at present. Any project, or indeed set of projects, that could answer and enable this would improve sustainability.”

*(Mick Jardine and Matthew Sauvage, Winchester)*

“The Humbox has to evolve as the needs and perceptions of their users do. There has to be someone in charge of promoting its use, communicating with the community and feeding back to the Subject Centres. Providing just remedial technical support is not sufficient.

There are already many suggestions about improving the Humbox technically such as introducing the possibility of formatting the content boxes, a prediction system for the search, the blog system for the comments (latest top) or the introduction of email alerts when someone uploads or comments.

One way of promoting the Humbox would be to invite colleagues participating in Subject Centres’ sponsored events or those who apply for any Subject Centre learning and teaching funding to upload materials related to the event or the application in the Humbox.” *(Antonio Martínez-Arboleda, Leeds)*