

Unspoiled Broth:

A Memorandum of Understanding for Chefs Cooking Up OER

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NUTRITION INFORMATION

When a meal involves multiple courses, prepared by several chefs, served by a large wait staff, to be consumed by thousands of diners, everyone in the kitchen and restaurant must be absolutely clear on their responsibilities to deliver a satisfying meal and avoid spoiling the proverbial broth. Open educational resource (OER) authoring projects similarly demand a high level of organization and planning and can involve a number of people with a variety of roles. A memorandum of understanding (MOU) is a flexible agreement between parties to establish the outcomes, tasks, and timetables of a project. It is ideally written immediately after deciding to move forward with the project.

The process of writing an MOU for OERs allows each partner to think through their objectives, needs, and contributions in order to reach a shared understanding of expectations. Because OER authoring projects are often approached collaboratively and non-hierarchically and involve individuals who have several competing priorities and deadlines, MOUs can help keep the project moving forward and on-track. This recipe provides an overview of the process for implementing

an MOU for OER authoring projects. It refers to a template created by librarians at Oklahoma State University (OSU), which has been successfully used to initiate and complete several OER authoring projects since 2018. This template was significantly adapted from MOUs in the University of Texas at Arlington (UTA) Libraries' Memorandum of Understanding Collection.

PROJECT OUTCOMES

This recipe will do the following:

- Outline a plan for composing and using a memorandum of understanding in order to support the creation of openly licensed pedagogical materials
- Specify the functions and sections of an MOU template to enable users to develop their own
- Describe the ways that the MOU can be integrated into the lifecycle of the OER authoring project as a way of sustaining communication between parties and keeping the project moving forward

NUMBER SERVED

The number of individuals working on an OER authorship project can vary considerably. Larger projects may include OER specialists,

library publishing or university press staff, reference and metadata librarians, editors and copyeditors, graphic designers, instructional designers, web developers, and content specialists. On the other hand, smaller projects may include a single librarian and faculty author working on a single project. The OER project may be funded by an external grant, or it may be sustained by the existing budget. Regardless of the size of the team or the source of funding, an MOU is recommended in order to clarify expectations and keep the project focused and on-track to completion.

At Oklahoma State University, the MOU has been used for roughly 25 projects since 2018, incorporating the adaptation and creation of OER: 1 in 2018, 13 in 2019, and 11 as of July 2020.

COOKING TIME

The process of drafting, negotiating, and signing an MOU can take between a week and a month or more. As stated in UTA *MOU Workbook* (Currier, Mirza, & Ossom, 2016), "The complexity of the project will determine the complexity of the MOU." All authors, librarians, and any others whose time and work will be impacted by the project should partici-

pate in the drafting process or, at minimum, receive and agree to drafts along the way. Furthermore, relevant managerial staff (e.g., deans, directors, department heads) should also review the MOU prior to signing the final version. While this may potentially lengthen the cooking time, it is essential for ensuring the viability of the project in the long-term.

In addition, the MOU should be regularly reviewed and revisited throughout the duration of the project to ensure that all parties are adhering to the agreed-upon responsibilities and timelines.

DIETARY GUIDELINES

An MOU provides libraries and authors collaborating in the creation of open educational resources with a structure for talking through and deciding on the necessary aspects of the project. Educators are increasingly creating and openly sharing the materials they prepare for instruction. University administrators, faculty, and students are seeking more affordable learning resources. Libraries are expanding their services to create an infrastructure to support the authoring, archiving, and dissemination of open educational resources.

At the same time, some faculty who are interested in creating OERs have questions about the quality, discoverability, and persistence of OERs in addition to the funding and support they will receive for undertaking this complex and time-consuming task. Librarians must also consider the institutional priorities, fund-

ing, services, technology, and labor required to see the project through from inception to completion. All parties must be clear on issues pertaining to copyright, licensing, hosting platforms, accessibility, and university policy. The MOU is a mechanism for guiding and formally documenting the outcomes and decisions of these conversations.

INGREDIENTS & EQUIPMENT

- An OER authoring team
- The OSU MOU OER template (see Additional Resources)
- A version control system. It is essential to save versions of the template as they are exchanged, using either version control software (e.g., Git, Google Docs) or file naming conventions.
- Time and patience. All parties must discuss, document, write, revise, agree to and sign the MOU, in a process that will likely require several meetings, emails, phone calls, and other coordination.

PREPARATION

According to the UT Arlington Libraries' *MOU Workbook*, an MOU workflow begins with a series of conversations whereby the parties share ideas, conceptualize the project, consult with all potentially impacted partners outside the immediate group, and sketch out their timelines and potential contributions. This is followed by a mutual decision on whether the project will move forward. Though the parties should document these early conversations in some form, they will not begin drafting the MOU until this decision is made.

Librarians collaborating with OER authors should have a general understanding of the levels of service their staff is prepared to provide throughout the lifecycle of the project. This may include, for example, copyright and licensing consultation, copyediting, layout and formatting, accessibility compliance, and instructional design expertise. The parties should distinguish which components of the project are essential and those that would be nice to have but are not integral. If any party's capacity to fulfill certain responsibilities is uncertain or limited, they should determine whether those tasks are essential and, if so, if that work can or should be outsourced.

COOKING METHOD

Once the parties have decided to move forward, the process of drafting the MOU may begin. The primary functions of the MOU are listed below.

1. State the purpose and scope of the MOU itself.
2. Identify all parties and their roles.
3. Define all disciplinary and professional jargon to avoid ambiguity.
4. Document the background and context: When did the initial meetings take place? Was any work completed? Have any time constraints already been discussed? How did conversations move from "ideal" to "achievable"?
5. Define the authors' and libraries' responsibilities. We have determined eight areas of responsibility:
 - a. Project management and communication. Includes logistical issues

- such as methods and frequency of communication, funding details, and agreement to conform to the Col-laborators’ Bill of Rights.
 - b. Authoring. Includes deliverables (outline, chapters, rough/final drafts), incorporation of external material, copyediting, instructional design, use of existing OERs, and determination of the software/platform/file formats that will be used for writing the work.
 - c. Formats. Requires the OER to be delivered in enduring/sustainable file formats as defined in an appendix.
 - d. Accessibility. Requires the OER meets accessibility standards as defined in an appendix.
 - e. Using third-party content. Requires the author to determine the ownership of third-party content, document decisions pertaining to fair use and/or permissions, following licensing terms, and consult with the library or the university legal counsel on intellectual property questions.
 - f. Publication. Includes attribution, cover, branding, platform, and dissemination.
 - g. Copyright ownership. Requires agreement to license agreement in the addendum.
 - h. Post-publication. Includes any obligations the parties will have in assessing and documenting the usage of the OER.
6. Specify licensing and copyright terms, including relevant institutional intellectual property policies, ownership and licensing of the final work, and relevant Creative Commons assignation.

**Memorandum of Understanding for
[Institution]
Open Educational Resources Initiative**

[Book Title] Open Textbook Creation Project

MEMORANDUM OF UNDERSTANDING (MOU) between

[Author(s)]

and

[Institution/Representative(s)]

This is an agreement between *[Author(s)]* and *[Institution/Representative(s)]*
on the creation of an open textbook entitled *[Book Title]*.

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Figure 1. Oklahoma State University MOU OER template table of contents.

7. Outline details on funding for authors (if applicable), including the amount and the conditions under which it will be disseminated.
8. Agree on the contingencies should a missed deadline occur.
9. Describe accessibility requirements.
10. Determine archiving and preservation considerations.
11. Prescribe requirements should authors apply for external funding relevant to the OER creation.
12. List additional resources beneficial to either party.

Once all parties are satisfied with the document and it has been reviewed for clarity and grammar, it should be reviewed by relevant administrators and signed by the selected corresponding librarian and corresponding author. The first page of the OSU MOU OER template, including the title and table of contents, is displayed in figure 1.

CLEAN-UP

Once authorship commences, the MOU should not be set aside and forgotten, but rather must remain a living document through the lifecycle of the project. It may serve as a reference point to guide conversations and help ensure that each party is moving toward specific milestones, such as the submission of chapter outlines or drafts. Deadlines may need to be shifted, or personnel changes may require revisiting previously agreed-upon tasks. If the parties agree

that modifications are necessary, they may write addenda to the MOU specifying those changes.

On approaching the completion of the project, the parties should review the MOU to confirm that all goals were met and to verify that no additional addenda need to be written. Finally, the MOU should be included in the assessment of the project, including analysis of its comprehensiveness, level of detail, effectiveness, and the extent to which the parties adhered to its stipulations.

If you adapt and modify the OSU MOU OER template, consider sharing it and distributing it under the terms of a Creative Commons license. This will allow other institutions to use or adapt it and will help the wider OER community continue to develop good practices and lessons learned. All chefs in the OER kitchen can benefit, equipping us to cook nicely seasoned and well-balanced broth and serve up delicious, flavorful meals.

ADDITIONAL RESOURCES

Currier, B., Mirza, R., & Ossom Williamson, P. (2016). *Memorandum of understanding workbook, version 1.0*. University of Texas at Arlington Libraries ResearchCommons. Available at <http://hdl.handle.net/10106/25651>. Licensed under Creative Commons Attribution-NonCommercial (CC BY-NC).

Iakovakis, C., Essmiller, K., & Upson, M. (2019). Oklahoma State University memorandum

of understanding template for open educational resources (OER) projects. Oklahoma State University Library SHAREOK. Available at <https://hdl.handle.net/11244/322075>. Licensed under Creative Commons Attribution (CC BY).

Note: This document is intended to be modified according to the scope and exigencies of the involved parties. The template authors have made it available under the terms of a Creative Commons Attribution 4.0 International License (<https://creativecommons.org/licenses/by/4.0/>), specifying that “the template may be used in a for-profit environment for for-profit projects, so long as the template itself is not monetized without permission.” The latter sentence is reused directly from the UTA *MOU Workbook*.

Reed, M., Currier, B., Mirza, R., & Ossom Williamson, P. (2017). *Memorandum of understanding for UTA CARES grant program*. University of Texas at Arlington Libraries ResearchCommons. Available at <http://hdl.handle.net/10106/26740>. Licensed under Creative Commons Attribution-NonCommercial 4.0 United States (CC BY-NC).

United States Department of Agriculture (n.d.). *Memorandum of understanding template*. Available via the Wayback Machine at https://web.archive.org/web/20111125112047/http://www.nal.usda.gov/fsn/Guidance/mou_example_final.pdf