



OpenSpires
supported by the
Higher Education Academy & JISC

Appendix 4: Use Cases

- 1: University Department with high profile material but protective of its relationship with speakers
- 2: Podcast material published in a journal
- 3: Podcasts created from video and PowerPoint slides
- 4: High value material and non-derivative licence
- 5: Supplying content to OER Africa

Use Case 1: University Department with high profile material but protective of its relationship with speakers

Background

Department X has a number of Institutes in high profile subject areas with world-renowned academics producing highly desirable content. The Department was involved in the iTunes U project but handled all the communication with the academics and was protective of these relationships. Some of the iTunes U podcasts would be very desirable for OpenSpines and a meeting was scheduled with the Department to introduce the OpenSpines project.

Issues

During this meeting, it was clear that members of the Department had various concerns:

- The legal forms were onerous. They found the iTunes U form too lengthy and did not want to present their academics or visiting speakers with an additional form for OpenSpines. Why couldn't there be one simple form, preferably no longer than one page with some simple tick boxes? *Response from OpenSpines:* One of the objectives of the OpenSpines project is to combine and simplify the legal forms. However, as this requires input from the University's Legal Department the timescales for this are outside the control of the project team.
- The Department was keen to maintain all communication with their academics and would be unhappy if the project team contacted people who had previously been involved in iTunes U in order to sign another agreement for OpenSpines. *Response from OpenSpines:* The OpenSpines project team will respect the wishes of the Department and would certainly never approach academics in the name of the Department. However, the academics in question may become involved in OpenSpines via a different route, for example by recommendation of another academic colleague.
- The Department has recordings on their own website and therefore would prefer to send an RSS feed rather than go through the current established process for submitting podcasts. *Response from OpenSpines:* There are technical issues behind this and there is some concern about relying on other Department's architecture which is outside of the podcasting team's control. As the podcasting team is providing a central service to the University it is safer to support it centrally rather than trying to sustain a devolved model.

Outcomes

Once these issues had been discussed, the Department suggested running a trial with OpenSpines. They highlighted a forthcoming seminar series which would be suitable and offered to manage the recording themselves. To ensure that they maintained the relationships with the speakers, they also wanted to handle the admin side and send the legal forms out ahead of the recordings. To facilitate this they requested a short paragraph to explain the legal form in simple terms. This was provided along with a set of FAQs.

The department uploaded the recordings of the seminar series and supplied all the legal forms signed by the speakers. The department also supplied several other recordings with legal forms which could be released under a Creative Commons licence.

Use Case 2: Podcast Material Published in a Journal

Background

Scheduling

First contact with the contributor in this case came about following an email sent out by the contributor's departmental communications officer. The email described the podcasting project and encouraged members of the department to get in touch and submit material. In September 2009, shortly after the contributor ('R') responded offering to be recorded for the project, a member of the podcasting team visited her. At this meeting R described her work, which was three short talks on subject areas within a particular topic, and there was a general discussion about the recording process and university podcasting project. It was decided that the material would be organised into three separate tracks of around 15 minutes, which would all be recorded in the same session, in the quiet setting of R's room at her college. R was contacted to arrange a convenient date and time for the recording. The recording took place on 4th November at 3pm.

Audio Format

As R was going to be the sole speaker in the recording, it was deemed most appropriate to use simple audio only. The equipment used was a Marantz PMD660.

Issue: Licensing

Issue

After the recording had taken place, R raised the issue that a journal wished to publish an article based on the material presented in the podcast recording. Although for her own part enthusiastic about having the work published in both places, R was aware that the journal may have a copyright claim over the material which could prohibit publication elsewhere.

Immediate Response

In response, one of the podcasting team took the matter to the project's Legal Officer, and received advice that there would only be a problem with the overlap if:

- (i) The article and the talk were word for word identical for a substantial run; *and*
- (ii) The publishing deal asked for exclusive rights to distribute audio versions of the article.

The Legal Officer further suggested that even were those conditions to exist, there may well be opportunity for negotiation with the journal's publishers. All of this information was conveyed to R.

R was happy to liaise with the journal's publishers, and enquired into the matter with them. R forwarded their reply to a member of the podcasting team. The publishers wrote that they did not perceive a problem, or any copyright issues, with the podcast. However, they requested that a link to the article, once published, be added to the podcast website. They further wrote that they would also be interested to stream the podcast from the journal's website, or, failing that, add a link to it.

The podcasting team consented to both suggestions from the publishers, whilst making clear that as the podcasts would be under a Creative Commons licence, they would have to be free

wherever they appeared. The publishers confirmed that all of their audio visual content was free. They published the article in December 2009.

Next Steps

R's contribution was published on podcasts.ox.ac.uk with a creative commons licence as planned, in three short talks. The publishers' request was adhered to by inserting a link in the summary of the work. Further, as metadata including information about R, an overview of the talks, key concepts and further reading has been collected from R for contextual purposes, a link and reference to the journal will also appear when any additional information is released alongside the podcasts.

Outcomes

- There would be additional exposure of the podcast through linking/streaming from publisher's website.
- This example set a precedent for talks split into smaller chunks. It may make the topic less intimidating and encourage commuting listeners, casual listeners, or listeners for whom English is not a first language.
- The team followed a standard workflow: invitation > response > meeting > further arrangements > recording > publishing.
- It established a basic template workflow for when third party copyright issues arise: communication with contributor > legal advice > convey advice to contributor > contributor makes enquiries to third party > negotiation > agreement > implementation.

Use Case 3: Podcasts created from video and PowerPoint slides

Background

The podcasting service were contacted by the training officer, W, of department x who asked whether it would be possible to film a short series of videos about the department using a mixture of live presenting and PowerPoint presentations in a 'TV weatherman-style' format; live presenters superimposed in front of a computer-generated background. The podcasting team was able to film and edit these videos. The method they employed to achieve it is outlined below.

Method

For the 'TV weatherman' format to be successful (a person appearing before a computer-generated background or other artificial images), the podcasting team filmed the presenters in front of a green screen backdrop so that the presenters could be 'placed' in front of their slideshow presentations in post-production editing. The presenters had also brought along their PowerPoint presentations that were recorded simultaneously using an iMac with QuickTime 10, which has screen recording capacity. So each presentation had two 'inputs'; the presenter speaking in front of a camera with a green screen in the background and their presentation slideshow recorded on the computer. Both inputs would be put together in the post-production editing stage. The presentations were filmed in a teaching room in Computing Services, which was quiet enough to minimize the risk of interruptions or background noise from disrupting the recording.

In order to help the presenters visualize exactly what was going on, the podcasting team used a vision mixing desk linked to the camera, the iMac and a monitor screen placed below the camera so that the presenters would be able to see themselves, and their presentation, while they were presenting. Although this was not an essential part of the operation, it put the presenters at ease and so was useful in that respect.

Lighting and sound were also important factors to consider. A pair of LED 500 watt lights were used as well as the regular room lights to properly light the presenter and the green screen background. This is important so that the presenter can be clearly differentiated from the green screen. If the lighting was incorrect, the post-production editing would be much more difficult and time consuming.

A wireless tie-clip microphone (tuned into the wireless microphone receiver connected to the camera) was given to the presenters who wore it so that audio was captured. The iMac also recorded sound using its in-built microphone. The quality was not usable in the final outputs but it was necessary to capture to help with editing. More will be said on this below.

Post-production editing

Once the filming was complete, the podcasting team took the material and using the Chroma Key tools in Final Cut Pro (professional standard video editing software) they were able to blend the PowerPoint presentation and the presenter using the audio recorded on the camera and the computer to synchronize the videos together. The videos were then exported and sent to the presenters for approval.

Summary

1. The podcasting team was asked to film a series of 'TV-weatherman-style' videos which would show the video presenter in front of their slideshow presentation (like a weatherman in front of a map).

2. After initial testing, the podcasting team filmed the videos using screen capture software to record the presentation and an HD camera to record the presenter in front of a green screen.
3. The videos were all filmed back-to-back in one day by a member of the podcasting team.
4. When filming was complete, the podcasting team edited the videos and created a series of outputs which were sent to the speakers for approval.

Use Case 4: High value material and non-derivative licence

Background

Contributor Y, a high profile academic, approached the podcasting team with a view to creating recordings to accompany his most recent work, which happened to be on a topic of some public interest. Two members of the OpenSpires team met with Contributor Y to discuss a possible podcast, and it was decided that a video recording would take place, with a view to ultimately producing several short, introductory pieces, in addition to a longer piece that would be minimally edited and represent a casual discussion of the topics. Both types of recording would take place in one session, in a college in Oxford, and involve the input of two students who were sufficiently well versed in the subject area to move the conversation along intelligently. Three cameras were used, and two wireless mics.

Issues

- Contributor Y was content for the material to be released under a Creative Commons licence, but following some bad experiences in the past with poor and misrepresentative editing, was adamant that the licence must be non-derivative. The project team were concerned that releasing material under a non-derivative licence was not in keeping with the original JISC call ("Projects will be expected to make a significant amount of existing learning resources freely available online, licensed in such away to enable them to be used and repurposed worldwide").
- At first it seemed that there may be copyright issues, given that Contributor Y's work was due to be published in a few months' time in the form of a book.
- The video recording took place in a non-lecture theatre environment in a room within an old building in one of the colleges. This engendered issues of lighting, space, and some time constraints.

Outcomes

- The material produced was of high quality, of excellent academic value, and of public interest. If it were not secured under a non-derivative licence, the project team would have been unable to convince Contributor Y to release it under a Creative Commons licence. The view was taken that it was better to release it with some restrictions on its repurposing than not to release it at all. Some repurposing could still take place, for example inclusion in an anthology of complete works. Moreover, the project team found it preferable to take a collaborative rather than doctrinaire approach with contributors, and give them genuine control over the release of their work. Although it was regrettable that in this specific instance a non-derivative licence was necessary, all other OpenSpires material published to date allows derivations, and in all good sense it was felt that one exception would not affect this vast majority going forward.
- The publishers with rights over Contributor Y's book were contacted directly with information on the OpenSpires licence, and with advice that it was open to them to use the podcast in any promotional material. No issues were raised on their part.
- By leaving plenty of time to set up and observing and compensating for changes in natural light, the video ultimately benefitted from the atypical setting.

Use Case 5: Supplying content to OER Africa

Background

In January 2010 a member of the project team from the University of Nottingham circulated an email to the other Institutions involved in the JISC Open Educational Resources Programme. Nottingham was involved with OER Africa and The UK National Commission for UNESCO in an initiative to source open resources from the UK to support education projects across Africa. Nottingham had signed a memorandum of understanding with OER Africa to support each other in their respective OER goals. They felt that it would be a mutually beneficial relationship and had been shaping a plan to help OER Africa tap into UK resources.

Issues

One project was at Kenyatta University where the School of Business was developing an Executive MBA programme to be operational by September 2010. They had already sourced a number of resources from a number of repositories but were still looking for materials to support the programme. A course outline for the MBA was circulated which provided the high level module descriptions. OER Africa was looking for resources that could be used to build the modules:

- Quantitative Methods for Managers
- Dynamics of Management and Leadership
- Business Research Methods
- Financial Reporting & Interpretation
- Economics for Managerial Decisions
- Human Resource Management
- Strategic Marketing Management
- Operations Management
- Project Planning, Monitoring and Evaluation for Managers
- Strategic Management & Organization Change
- Global Business
- Finance for Managers

The Oxford Centre for Entrepreneurship and Innovation at the Saïd Business School, University of Oxford, runs a free nine week evening lecture course of basic business skills entitled 'Building a Business'. It covers good business practice with a focus on science entrepreneurship. It is designed around technological enterprise but most course material is relevant to general business practice. These lectures are recorded and available through Oxford's podcasting website and iTunes U. In January 2010, four of the lectures were also available through OpenSpires with a Creative Commons licence:

- Entrepreneurship and the ideal business plan
- Negotiation skills
- Evaluating a venture idea
- Managing people, managing teams

This means the lectures are available as Open Educational Resources (OER) and can be redistributed and reused by anyone around the World provided the copyright holder is acknowledged and the material is used non-commercially.

A member of the OpenSpires project team responded to the request from Nottingham suggesting that the lectures which were available as OER may be suitable for Kenyatta University. An email was also sent to the Head of Programmes at the Oxford Centre for Entrepreneurship and Innovation to make

them aware of the OER Africa initiative. In a previous meeting to discuss OpenSpires they had commented that they would welcome this sort of reuse.

The Head of Programmes had a number of queries about the initiative, principally to understand the relationship between Nottingham and OER Africa but also to query if the Kenyatta Executive MBA was a commercial 'for profit' programme (as they are in the UK). They had concerns that they could not add to a commercial venture being run by another University. The OpenSpires team queried if material under the Attribution-**Non-Commercial**-Share Alike Creative Commons licence could in fact be used on a 'for profit' programme.

The queries were sent on to the University of Nottingham.

Outcomes

The contact at the University of Nottingham explained the nature of the relationship (as described above) and also enquired about the 'for' or 'not for' profit status of the course to be run at Kenyatta University.

The University of Nottingham had also queried the non-commercial licence issue with JISC legal and found that the answer was not black and white. It hinges on the viewpoint taken around the primary purpose for using the material: if you believe the primary purpose is to educate and generate revenue second it becomes safe to use on a 'for profit' course. However, if you believe the primary purpose is to create revenue then it is considered commercial.

Kenyatta Business School confirmed that they will run their MBA under the general 'not for' profit status umbrella of the university along with their other courses. They did not intend to run it as a standalone 'for' profit exercise or through a limited company in the way that is common in the UK. As it will be grouped with the other courses it satisfies the 'primary purpose' test as a non-commercial venture first with any potential revenue generation second.

This information was passed on to the Head of Programmes at the Oxford Centre for Entrepreneurship and Innovation who was more than happy to support the initiative.

At the time of writing (March 2010) Kenyatta Business School were still in the 'content gathering' stage and could not confirm if the Saïd Business School material will be included. Nottingham have asked Kenyatta to factor feedback to suppliers into their design model and to supply a list of what resources are used in which courses and in which context.