**Open Education Project Roadmap**

Adapted from:

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| **Project title**  |
| **Your name and Institution:** Please note this for the record.  |   |
| **Project Title:** A short, descriptive title of your project. At first, you may want to write down a list of titles or possible ideas. Come back each week and revisit this section until you settle on a final one.   |   |

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| **Making the case**  |
| **Status Quo:** Making the case for your open education project starts with outlining why there is a need for action. What challenge(s) are you facing on campus or in your community that open education can help solve? What efforts are already underway, and what else can be done? For many contexts, this will start with textbook costs, but be sure to think through other challenges that open education can solve. Also be sure to think through what policies and norms exist that may stand in the way of change.  |   |
| **Mission Statement:** What is the purpose of your open education project? Close your eyes and envision how open education would change the world if you could wave a magic wand. Your mission statement is how your project contributes to that goal. Mission statements are meant to be broad and long-term, so your project will at most be making a step towards this goal, as opposed to achieving it completely.  |   |

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| **Open Education on (and Off!) Campus**  |
| **Stakeholders & Opinion Leaders:** Stakeholders are the people who are affected by open education more broadly, and your project more specifically. Examples include: students, faculty, deans, librarians, curriculum committee, bookstore manager, etc. Once you identify stakeholder groups, think about who are key opinion leaders in each of the groups. You will flesh this out more in your Stakeholder Assignment.  |   |
| **Allies (and Opposition):** Who in your context is allied with your mission? This can include potential partners who will actively be involved in supporting your work, as well as high-level administrative supporters who can provide clearance or endorsement. Some allies may come from your stakeholder list, but not all of them. Also think about whether there is anyone who might oppose or work against your mission.  |   |

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| **Discovering & Evaluating OER**  |
| **Project Scope:** Define the scope of your project. In most cases this will be your campus or organization, but some capstones have broader scopes that might include your state/province, system, or a specific network. It also could be a more narrow scope, including a specific department, program, or course. Go back to Section 3 and think about whether there are any stakeholders you missed, or if there might be some that are now out of scope.  |   |
| **Opportunities & Alignment:** In what ways does your project align with broader initiatives relevant in your context? How does it fit into your institution’s mission or broader state/provincial goals? Are there specific opportunities coming up that your project could take advantage of?  |   |

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| **Copyright & Open Licensing**  |
| **Project Abstract:** Provide a brief description of your project idea here, explaining so that someone unfamiliar with your project might be able to understand it. If you’re still settling on an idea, feel free to describe a few ideas you are thinking about and come back later when you narrow it down. Remember to update your title in Section 1 to match your abstract. Remember, your project needs to be achievable by the end of the spring semester.  |   |
| **Funding & In-Kind Resources:** What kind of resources are needed for your project to run successfully? This could include funding, time release, or other in-kind support like event space, graphic design, etc. If you are giving out funding or incentives, be sure to think about the process required and what conditions you want to place on it. Not all projects involve funding, but it’s important to start thinking about this now.   |   |

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| **Population**  |
| **Labor:** Who will be involved in your project? At the very least it includes you, but think about who else might be involved in implementing your project—both formally and informally. This could include an advisory committee, other library staff, or partners. Will these people need any kind of professional development or training? If so, how can you help provide it? Are you relying on people engaging in invisible or volunteer labor? If so, how can you offer recognition and compensation? Revisit Section 5 if you need to reconsider funding.  |   |
| **Structural Equity and Inclusion:** How will your project contribute to equity for students and other stakeholders on campus? In what ways are you working to identify missing or marginalized voices and include them in the process? In what way might your project perpetuate inequitable or closed structures, and how might you work actively and intentionally to dismantle those structures?    |   |

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| **Timeline**  |
| **Project Outline:**  Now that you have done the hard work of laying out a vision, goals, and strategy, and you have considered the equity implications of your work, it’s time to sketch out the activities of your project. In this section, create an outline of the specific steps, phases, or actions you will engage in that get you from the status quo to your goals.   |    |
| **Barriers & Risk:** Consider each step in your project outline. Is there any one step that will make or break your project? Are any of the steps dependent on factors outside of your control? Especially in these uncertain times, it’s best to plan your project so that success depends on factors *within* your control. Identify the key barriers or risks and consider how to adjust your project to reduce them. Describe any remaining barriers and risks and how you will plan to address them.   |   |

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| **Open Pedagogy & Illustrating Impact**  |
| **Communications:** What are the key audiences within your context who need to be aware of your effort while it’s underway? What channels can you use to make them aware? What messages will resonate with each of the key audiences? Think about presentations you can make, communications you can send, and other ways of creating buzz. Take a look back at your key stakeholders and opinion leaders in Section 3.  |   |
| **Networking:** How can you make sure that the impact of your project is recognized? How will you celebrate champions and reward those involved? How can you make sure the appropriate entities (your supervisor, etc.) are aware of your accomplishments? Think about conference presentations you might give, social media posts you might make, or other ways to disseminate your impact so that others may recognize and learn from it.   |   |

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| **Open Education Advocacy & Institutional Change**  |
| **Evaluation & Assessment:** How will you measure if your project is a success? Think about ways that you can measure outcomes, both in terms of collecting feedback and also more quantitative measures. Brainstorm specific metrics that can define whether you have met your goal and how you might measure them.  |   |
| **Institutionalizing Change:** Consider what comes after your capstone project. If you see your project as the initial phase of a larger effort, describe your vision for the next steps. If your capstone project will be complete by the end of the semester, consider how you or others might build upon your work. How do you see your work feeding into building a culture of openness on campus long term? What steps can you take now?  |   |