

From Little Things Big Things Grow

From Simple Sticky Notes to a Comprehensive Relational
Database: Our JCU Open Education Project Management
Journey

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CAUL Community of Practice

Session Overview

Part 1: A big picture view of project management across the JCU Open eBooks journey

- About our University
- Where we started – 2021
- Where we are now – 2024
- Mapping our journey against a Maturity Model for Open Education

Part 2: A book level view of project management using the 7 Phases of the CAUL Publishing Workflow

- Introducing the CAUL OER Collective Core Checklist
- Introducing the MARC record template

About our University

- James Cook University is a regional university in tropical North Queensland with our main campuses in Cairns, Townsville and Singapore
- Students from 100+ countries
- One of the highest proportions of Indigenous students (7%)
- 72% regional students
- 24% of students identify as low SES
- 50% of students identify as first in family

Source: JCU Data 2019



JAMES COOK
UNIVERSITY
AUSTRALIA

Background: Where we started with our Open eBooks journey



The use of OERs and Pressbooks at JCU began as a pilot project known as the JCU Open Education Initiative (2021-2022).



We started with 1 part time staff member appointed as Open Education Librarian and a group of enthusiastic library staff from multiple library teams. Our first goal was to reach 3 adoptions, 3 adaptations and 3 creations within the first year.



Those early goals were quickly surpassed and there are now over 30 books published and many more underway. The increasing scale of the project has seen a significant rise in authors, content and data that needs to be project managed and reported on.

Background: Key institutional support



JCU Open Scholarship Policy - JCU is committed to the widest possible dissemination of all scholarly outputs - to ensure discovery of, and equitable access to JCU research outputs, research data and educational resources.

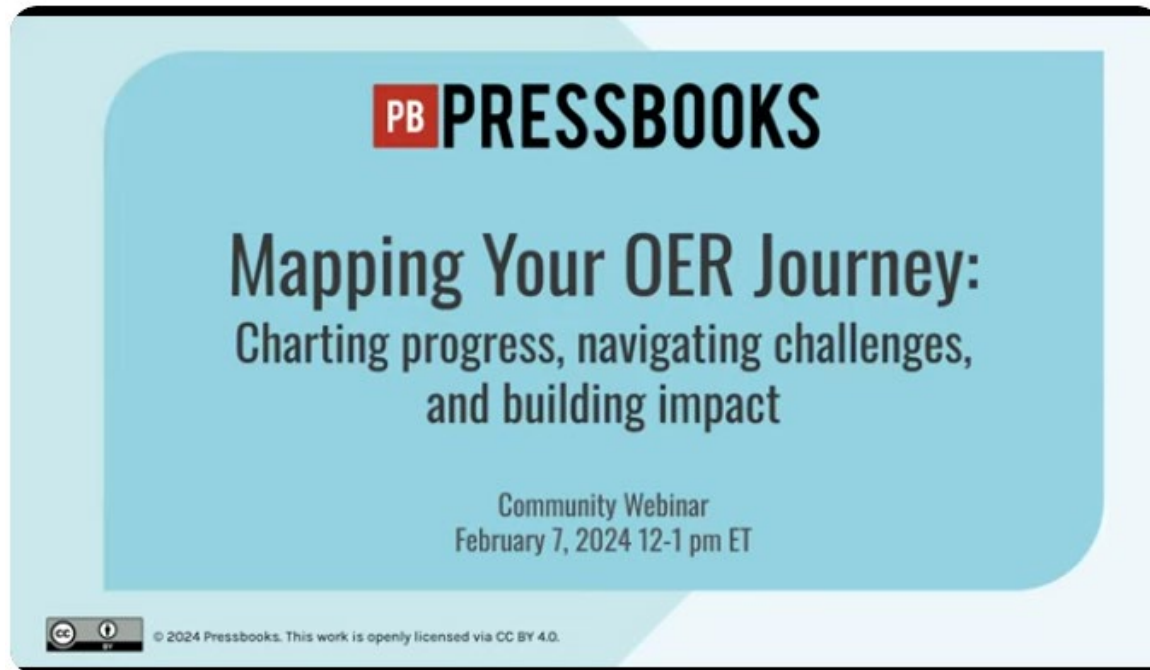


Through the strategic inclusion of OE in this policy, JCU supports the adoption, adaptation, and creation of high quality **Open Educational Resources (OERs)** where they contribute to quality educational experiences and student success.



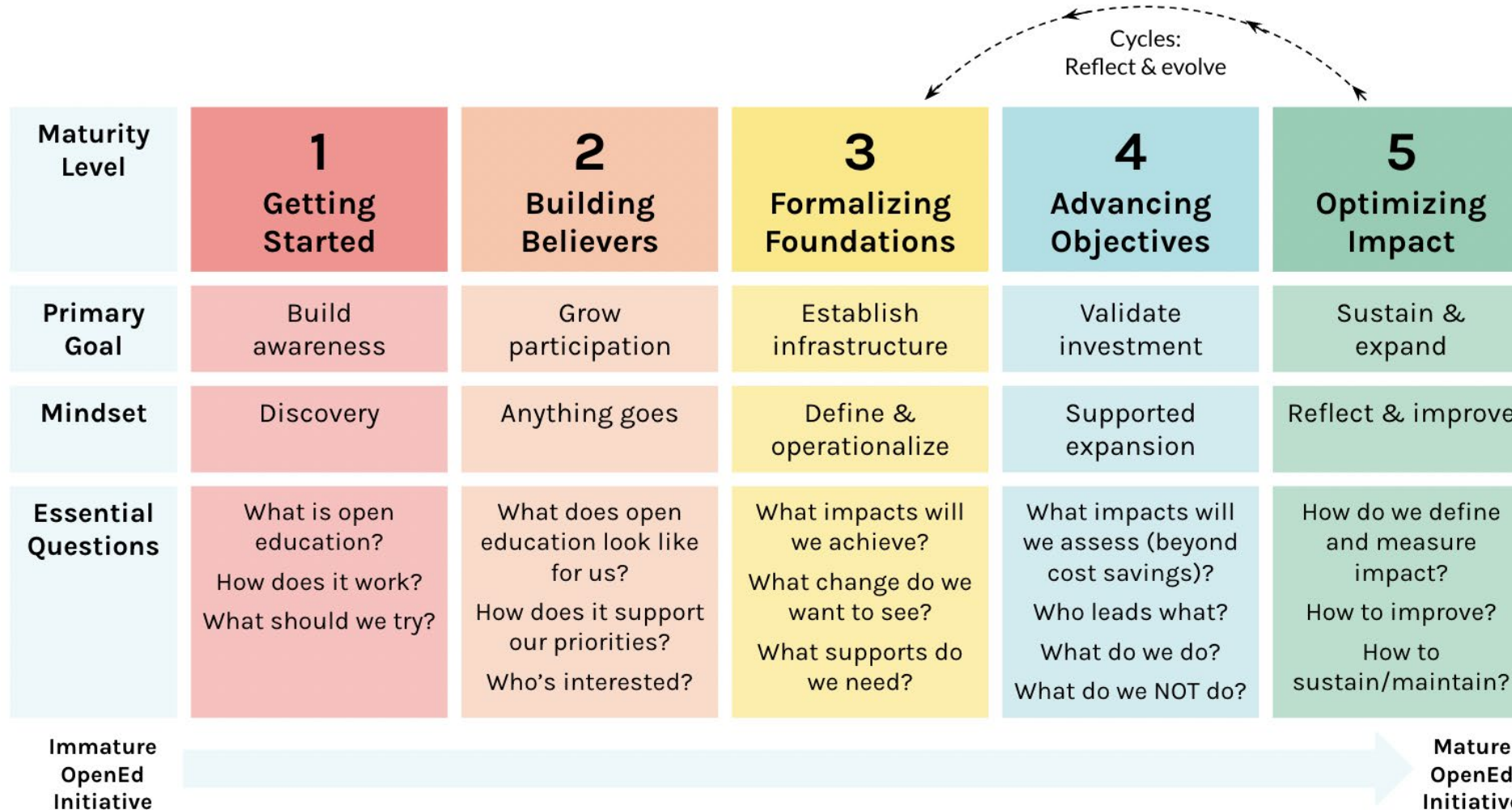
Our **JCU Library Director** and **Library Leadership Team** have been highly supportive and absolutely integral in achieving Education Division level support for the pilot project and subsequent institution-wide initiatives (including the ongoing JCU Open Education Program and the 2 year HEPPP funded *Textbook Affordability Project*).

Applying an Open Education Maturity Model to track our project management journey



- This maturity model provides a framework for assessing a level of development for an organisation, project, team etc.
- A way to see progress and map against indications of success as development progresses.
- A planning tool for navigating toward the future stages of maturity.

Maturity Model Framework for Mapping Open Education Progress



Slido Question – Where do you see your institution on this maturity model scale?

PHASE 1 and 2

Getting started - anything goes (2021-2022)

Maturity Level	1 Getting Started	2 Building Believers
Primary Goal	Build awareness	Grow participation
Mindset	Discovery	Anything goes
Essential Questions	What is open education? How does it work? What should we try?	What does open education look like for us? How does it support our priorities? Who's interested?

- We started this phase in 2021 with our pilot project known as the *JCU Open eBooks Initiative 2021-2022*
- This was a very low-tech phase where we used lots of sticky notes and whiteboards
- We were learning the Pressbooks platform on the fly and slowly building awareness of OE through our existing relationships between academics and liaison librarians

PHASE 1 and 2

Real life example (2021-2022)

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- Our first Pressbook was an adaptation of a Libguide that librarians had co-authored with several academics. This was a quick early win
- A strategic collaboration with a key business academic led to the creation of a suite of 4 open textbooks to facilitate a “zero-dollar textbook cost (ZTC)” for the Graduate Certificate of Project Management program
- Thankfully, the academic author was very motivated, enthusiastic and an industry expert in Project Management, so this was an incredible opportunity to collaborate and practice project management as third space practitioners

PHASE 1 and 2

Practical advice at this stage (2021-2022)

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- Start to scale upwards from sticky notes and whiteboards towards Excel spreadsheets, Microsoft Planner, Microsoft Project, Trello, Google Docs, etc., to manage your book tasks and workflows
- Build a 'One Library' team approach and collaborate closely with Library Managers, Liaison Librarians, Cataloguers and Copyright experts
- Start using the 7 Stages of the CAUL Publishing Workflow to guide your eBook production and workflows

PHASE 3

Formalising the foundations (2022-2023)

Maturity Level	3 Formalizing Foundations
Primary Goal	Establish infrastructure
Mindset	Define & operationalize
Essential Questions	What impacts will we achieve? What change do we want to see? What supports do we need?

- We created a Core Checklist Template of every task in the production of an OER creation or adaptation. The JCU Open Scholarship Policy was officially adopted with key inclusion of open education resources.
- We moved from a pilot project phase to an official Open Education Program.
- Continued to be guided by the CAUL Open Publishing Workflow and constantly improved and finessed our core checklist of tasks.
- Started doing collaborative projects with other universities.
- Expanded our tools to include Cross-Institutional Microsoft Teams groups and the use of Excel spreadsheets/Google Docs to manage group tasks.
- Developed a JCU OER Author Guide with chapters on the publishing workflow, EOI forms, MOU/Author Agreements, and the Peer Review Process.

PHASE 3

Real life example (2022-2023)

Maturity Level	3 Formalizing Foundations
Primary Goal	Establish infrastructure
Mindset	Define & operationalize
Essential Questions	What impacts will we achieve? What change do we want to see? What supports do we need?

- *Legal Research Skills: An Australian Law Guide* – a collaboration by law librarians from 8 universities, across 6 Australian jurisdictions
- *Confident Supervisors: Creating Independent Researchers* – 31 authors, across 10 universities
- Successful in being awarded 3 CAUL OER Collective Grants
- 10 + Open eBooks published on JCU Open eBooks Platform
- Developed a curated subject discipline discovery collection in Primo

PHASE 3

Practical advice at this stage (2022-2023)

Maturity Level	3 Formalizing Foundations
Primary Goal	Establish infrastructure
Mindset	Define & operationalize
Essential Questions	What impacts will we achieve? What change do we want to see? What supports do we need?

- Constant communication
- Create checklists
- Cooperate with local and national colleagues and networks
- Collaborate with authors, fellow library staff, CAUL, etc.
- Collegial networks – share open practice and pay it forward

Phase 4 and 5

Advancing objectives and optimising impact (2024-)

Maturity Level	4 Advancing Objectives	5 Optimizing Impact
Primary Goal	Validate investment	Sustain & expand
Mindset	Supported expansion	Reflect & improve
Essential Questions	What impacts will we assess (beyond cost savings)? Who leads what? What do we do? What do we NOT do?	How do we define and measure impact? How to improve? How to sustain/maintain?

- Successful HEPPP funding for 2 year Textbook Affordability Project
- Needed a more sustainable way to manage the individual book projects and the overall outreach and relationships with authors and academic staff
- This led to an environmental scan of project management software (requirements, limitations etc.)
- Fortuitous opportunity to join in a session about the use of Airtable to project manage a textbook project at University of Texas
- Prepared a business case to move to Airtable – a relational database for both CRM and PM

PHASE 4 and 5

Real life example (2024-)

Maturity Level	4 Advancing Objectives	5 Optimizing Impact
Primary Goal	Validate investment	Sustain & expand
Mindset	Supported expansion	Reflect & improve
Essential Questions	What impacts will we assess (beyond cost savings)? Who leads what? What do we do? What do we NOT do?	How do we define and measure impact? How to improve? How to sustain/maintain?

- Looking to show impact – Launched the JCU Open eBooks Data Dashboard
- We investigated several dashboard options before developing our dashboard via LookerStudio (Google Analytics)
- The interactive dashboard shows the geographic reach, views, users and other impact analytics of each book

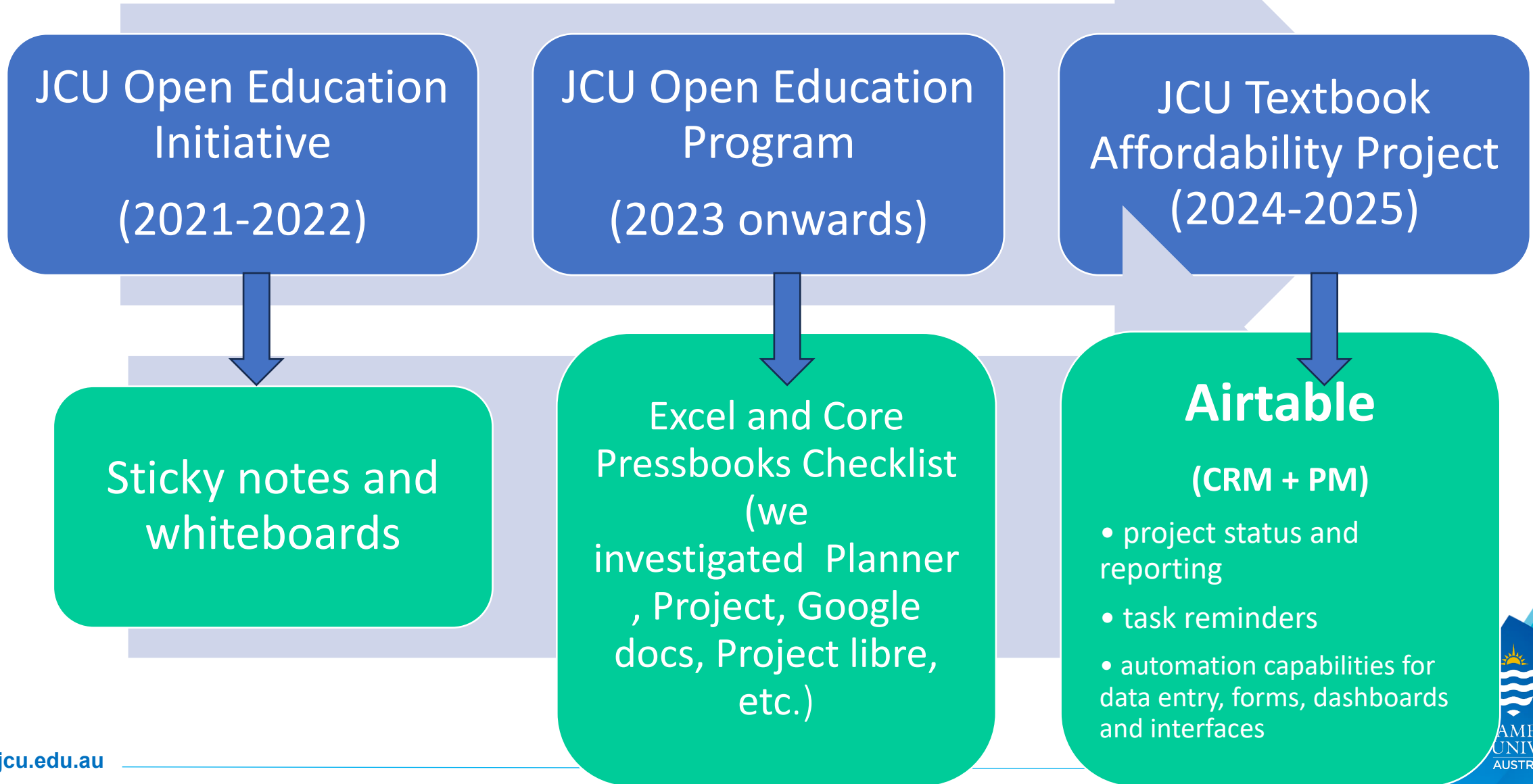
PHASE 4 and 5

Practical advice at this stage (2024-)

Maturity Level	4 Advancing Objectives	5 Optimizing Impact
Primary Goal	Validate investment	Sustain & expand
Mindset	Supported expansion	Reflect & improve
Essential Questions	What impacts will we assess (beyond cost savings)? Who leads what? What do we do? What do we NOT do?	How do we define and measure impact? How to improve? How to sustain/maintain?

- Be curious and experimental with dashboards and project management tools
- Advocate and make strong business cases for these tools that will allow your project to be scaled up, show impact and be sustainable
- Support from Library leadership is essential

Evolution of our project management approach



JCU Open eBooks

James Cook University Open eBooks Collection

ABOUT JCU OPEN EBOOKS

JCU Open eBooks is James Cook University's open textbooks platform based on Pressbooks. Open textbooks, also known as [Open Educational Resources \(OER\)](#), are created and reviewed by university staff and are licensed under an open copyright licence. Pressbooks is a suite of open source software products designed by and for educators.

WE'D LIKE TO WORK WITH YOU

If you would like to adapt, adopt or create an open text

GET IN TOUCH

Textbook Affordability Project 2024-2025

Reduce costs for students

1. Aim

Deliver JCU Textbook Affordability Project 2024-2025 to minimise or remove 'cost to student' for all first year core subject textbooks in line with other Australian universities (ZTC - Zero Textbook Cost) focusing initially on courses moving to trimester mode.

Prioritise quality low or no cost textbooks

2. How

- Audit first year core subject textbooks
- Analyse current textbook costs to students and the institution
- Explore alternative methods of access (unlimited licenses, OERs, curated reading lists)
- Collaborate to provide tailored individual solutions for each subject

First year students potentially paid **approximately \$2,000,000** for current first year core subject textbooks



Further analyse Library expenditure for current first year core subject textbooks

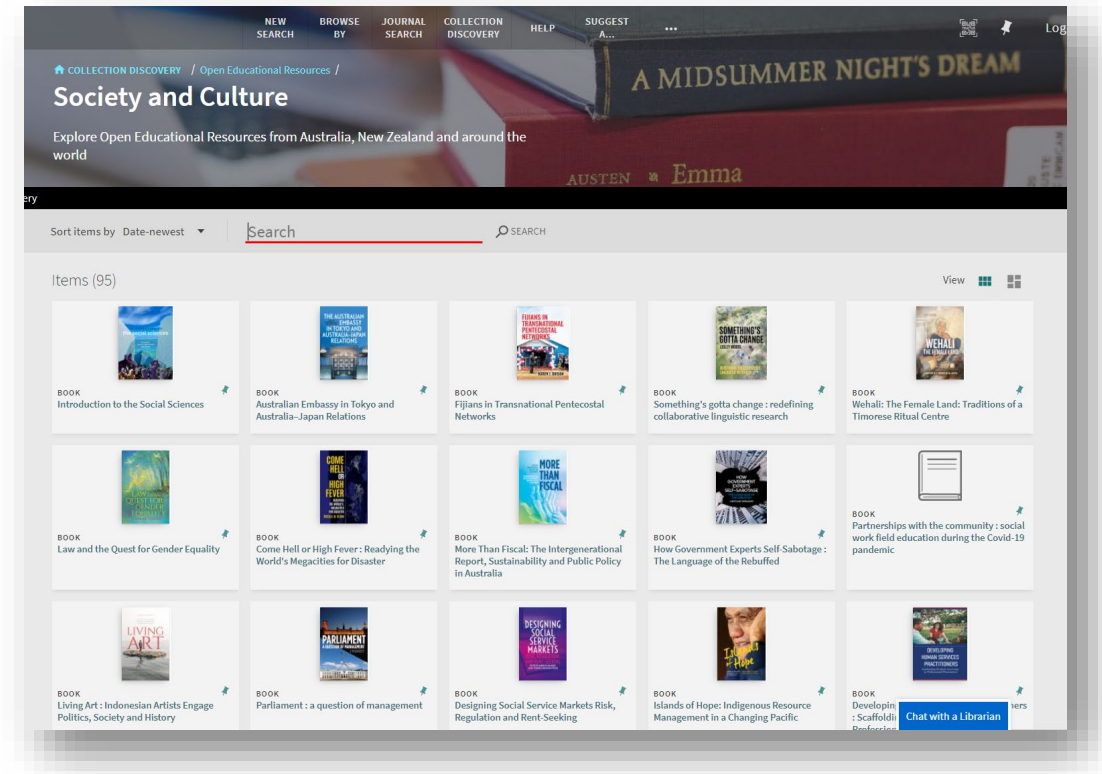
3. Outcomes

Benefits for Students, Academics, Alumni, JCU Community and beyond

- ✓ Textbook Ready Day 1
- ✓ Flexible Mode Availability
- ✓ Accessibility
- ✓ Financial Savings
- ✓ Diversity
- ✓ Student Success
- ✓ Student Retention
- ✓ Inclusivity
- ✓ Equity
- ✓ Unlimited Access

OER Discovery Collections

- Curated browsing collections for each subject discipline to increase the discoverability of OERs developed at JCU and other Australian and New Zealand universities
- Librarians make selections on an ongoing basis for existing books published in Australia or elsewhere that are of a high quality

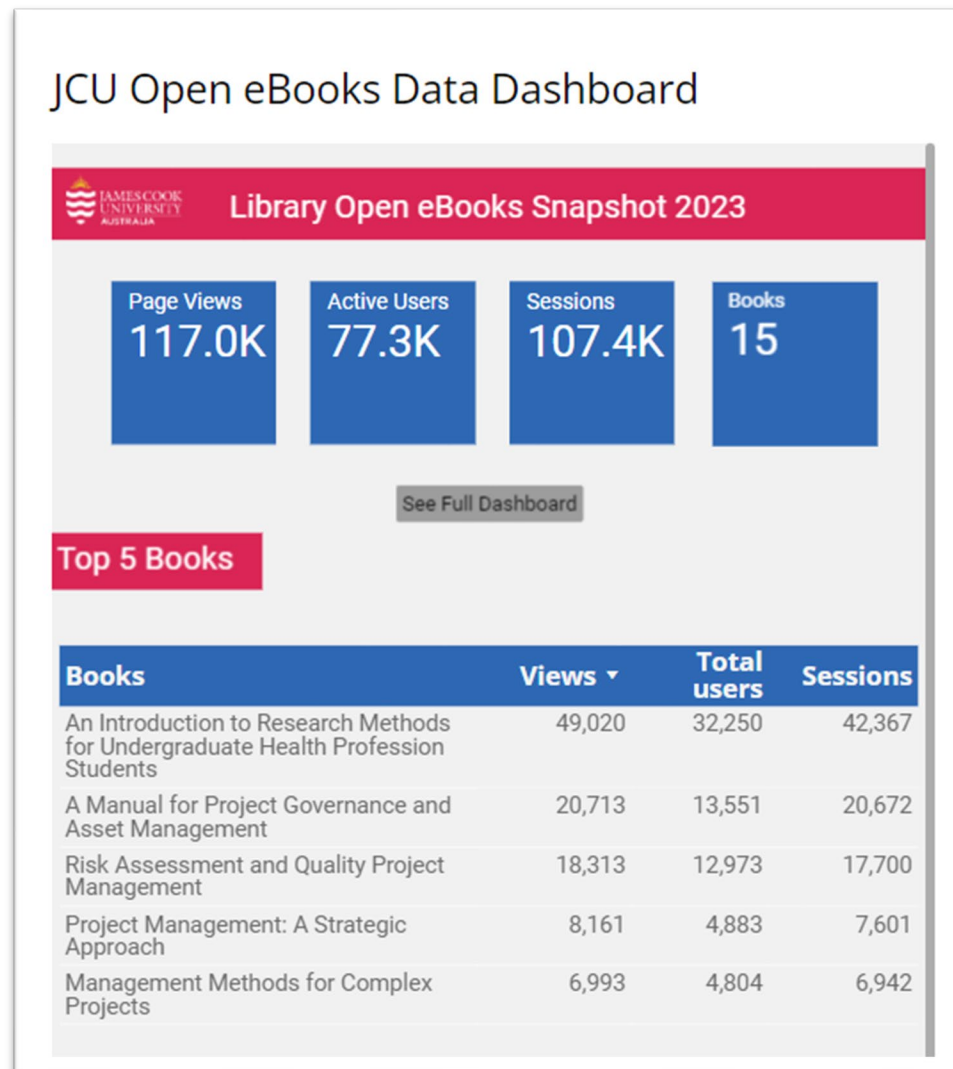


- [OER Discovery Collections](#)

JCU Open eBooks – Data Dashboard

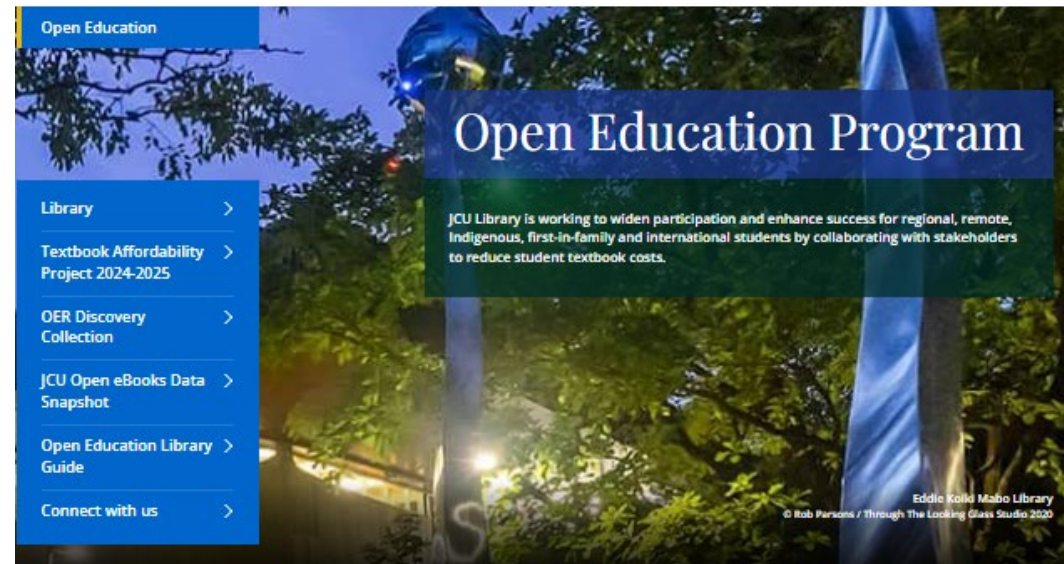
Since the Open Education Initiative began in 2021, we have an ever-growing data set of eBook analytics

- In 2024 we launched LookerStudio data dashboards to explore the usage, impact and reach of books on our Pressbooks platform.
- Features include both a Data Snapshot (publicly available) and a Full Data Dashboard (JCU SSO Authentication).



JCU Library

Open Education Program Website



► About Open Education

JCU Library has a deep commitment to the principles of Open Education and the deliberate dismantling of financial, legal, and inclusion barriers that impede access to high-quality learning resources. In 2021, JCU Library launched the highly successful JCU Open eBooks initiative, and has accelerated these efforts with the 2024-2025 Textbook Affordability Project.

Open Education empowers the creation, adaptation, and distribution of educational materials across various media formats. By fostering a culture of openness, collaboration, and accessibility, Open Education not only supports individual learning journeys, but also cultivates a pathway towards a brighter global future. It is through education that the world can collectively address universal challenges and enhance the well-being and prospects of individuals worldwide.

We can support you to explore a zero textbook cost (ZTC) experience for your students:

- A curated, customised Reading list
- Adoption, adaptation, or creation of an Open eBook
- Existing library resources

If you are interested in supporting Open Education through free, accessible, high-quality textbook alternatives, we would love to [hear from you!](#)

► Find out about JCU Open eBooks

JCU Open eBooks Catalogue

Authored by JCU academics

OER Discovery Collection

Curated by our JCU librarians for you

Open eBooks Data Dashboard

Deep dive into our Open eBook analytics



TEXTBOOK AFFORDABILITY PROJECT

Use template

Textbook Affordability Tracking

#OPERATIONS #EDUCATION #PROFESSIONAL

This Customer Relation Management (CRM) base will help Open Education Practitioners organize their campus initiatives. This includes tracking engagement from faculty, students, and staff, grant initiatives, OER Requests, as well as grant and outreach overviews.

Contacts

- Data Entry
- Faculty by College
- Faculty by Department
- Point of Contact
- Faculty Using OER

Grant A

- Data Entry
- Grouped by Semester
- Participation by College
- Grant Status

Grant B

- Data Entry
- Grouped by Semester
- Participation by College
- Grant Status

OER Requests

- Data Entry
- Requests by Semester
- Adoption Status
- Request Status

Explore the base →



JCU Open Education Team – Top Tips

- ✓ Communicate, communicate, communicate!
- ✓ Create checklists
- ✓ Cooperate with local and national colleagues and networks
- ✓ Collaborate with authors, fellow library staff, CAUL, etc.
- ✓ Collegial networks – share practice and pay it forward
- ✓ Create opportunities to be catalysts for change
- ✓ Connect the strategic dots – look for ways to influence policy, etc.
- ✓ Champion your authors and colleagues – recognition, awards.

~ Part 2 ~

A book level view of project management using the 7 Phases of the CAUL Publishing Workflow

Rani McLennan, CAUL OER Collective