Adopting or Adapting: Open Education Copyright Instruction for Faculty and Staff

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Mark Swartz, Visiting Program Officer, CARL
Overview

● What we’re doing
● People involved
● OER & Creative Commons
● Creation process: cost & sponsors, accessibility, content & adaptation, narration, translation, visuals, animation & video production, mock-ups
● Timelines, dissemination, preservation & revision
● Adaptation
What we’re doing

- Adapted colleges’ Copyright modules
- Audience: university faculty & staff
- Changes: terminology & examples
- Bilingual
Why?

- CARL's role in “Influencing Policy” and in advocating “for copyright legislation that is fair to users and workable for libraries.”
What was the objective?

The creation of a standardized, self-directed course that can be easily implemented at universities across Canada (both those that are members of CARL and those that are not).
A clear need at Universities

● In-person copyright education is a challenge
● Web-site materials also have a limited reach
● Self-directed courses have been used successfully for other types of university-wide training
● Standardizes training, allows institutions the choice of making the course mandatory or voluntary
Copyright environment

Climate of uncertainty:
● awaiting outcome of York v. Access Copyright appeal
● certification of post-secondary tariffs
● pending copyright term extension - CUSMA
● Copyright Review recommendations
● risk-averse institutions
We’d like to hear from you! What are the top three copyright issues or questions at your institution?
What are OER?

Open Educational Resources (OER) are teaching and learning materials that are freely available and openly licensed, so that they can be modified and repurposed to meet specific learning objectives.

The 5 R’s of open:
Retain, Reuse, Revise, Remix, Redistribute
OER & Creative Commons

- College Copyright modules were licensed CC BY-NC-SA
  - attribution required
  - only non-commercial reuse permitted
  - content can be adapted but must be shared with same CC license
- Desired license for CARL modules: CC BY
  - attribution only
- Giulia wished to license the illustrations with a CC0 license
  - no license restrictions at all
Creative Commons Licenses

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AODA conflict for AV material

Selecting the most appropriate license

- Final decision: CC BY-NC

Enables the modules to be adapted, modified, remixed for any non-commercial purpose, as long as attribution is provided.

- Removing “SA” requirement gives institutions more flexibility in the way they license future adaptations.
Selecting the most appropriate license

Canadian Association of Research Libraries 2019
http://www.carl-abrc.ca/copyright-open-educational-resource/

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  - Guelph Creative Commons Video: https://learningcommons.lib.uoguelph.ca/item/what-are-creative-commons-licenses (CC-BY-NC-SA)
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Forming the Working Group

- Call for participation in the working group sent out on January 16, 2019,
- Working group was established, and the first meeting held on February 19, 2019.
- Bi-weekly meetings in Zoom (we are now on meeting 21).
People involved

Amanda Wakaruk – University of Alberta
Ann Ludbrook – Ryerson University
Anne Pottier – McMaster University
Christina Winter – University of Regina
Dan Sich – University of Western Ontario
Heather Martin – University of Guelph
Kathryn Blair – University of Waterloo

Rowena Johnson – University of Calgary
Stephanie Boulogne – University of Victoria
Stephanie Orfano – University of Toronto
Stephen Park – Université du Québec à Montréal
Thomas Rouleau – University of Ottawa
Tom Adam – Western University
Mark Swartz – CARL/Queen’s University
Visiting Program Officer

- Part-time secondment
- Primary focus: copyright advocacy and outreach
- Information about the course and the other copyright related initiatives and documents: http://www.carl-abrc.ca/influencing-policy/copyright/
- Incredible network of copyright specialists at CARL institutions
Building on the work of the Ontario Colleges

Attribution-NonCommercial-ShareAlike 4.0 International (CC BY-NC-SA 4.0)
Project Group work

- Calls for Support Related to the CARL Open Copyright Project
  - Call for Sponsorship
  - Call for Expressions of Interest: Video Creation
- Creating of sub-groups to work on specific areas of the project
Sponsorship

Clark Wilson LLP
Dalhousie University
McMaster University
Queen’s University
Ryerson University
Simon Fraser University
Université de Montréal
University of Alberta
University of Calgary
University of Guelph
University of Ottawa
University of Regina Library
University of Toronto
University of Windsor
Vancouver Island University
Western University
Copyright in Crisis #ccsummit keynote by Dr. Ruth Okediji + panel w @mgeist @tenobre #viznotes by Giulia Forsythe CC BY 2.0
Some of the open courseware we have developed is posted on Open Waterloo: https://uwaterloo.ca/open/

- Engineering models
- CEMC 7&8
- http://accessibilitystandards.cel.uwaterloo.ca
Creation process: accessibility

- Audio
- Time-based images
- Captions
- Descriptive text transcript
- Text + still images (with alt text)
Creation process: accessibility

- http://accessibilitystandards.cel.uwaterloo.ca/
Creation process: content and adaptation

- Content covered by these modules: similar structure to modules developed by College Libraries Ontario
- What makes this content different?
  - Stylistic choices: changed tone/presentation
  - Copyright landscape has evolved since scripts originally developed!
  - Varying copyright compliance practices all over Canada
Adapting the scripts

• First editing team:
  – Made suggestions for additional material and reworks based on institutional resources, updated practices, etc.
  – Developed a set of learning objectives and outcomes for each module

• Second editing team:
  – Made more edits! (based on comments)
  – Ensured we achieved objectives/outcomes
## Overview of modifications

<table>
<thead>
<tr>
<th>CLO Module</th>
<th>CARL Module</th>
<th>What has been modified?</th>
</tr>
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</table>
| Introduction                                    | Introduction                                    | • More content in adapted module  
• Introduces 5-question guide to assist in making decisions. Adapted from resource used at Western and U of T |
| What Are My College’s Copyright Practices Based On? | What Are My University’s Copyright Practices Based On? | • Q&A format modified to include more context about copyright fundamentals  
• Focus on user rights, highlighting unique institutional practices |
| When Do I Need to Think About Copyright?        | When Do I Need to Think About Copyright?          | • Minimal modifications. Tone/structure changed to accommodate different style of graphics  
• Updated examples |
| The Balancing Act: What Rights Do Copyright Holders Have? | The Balancing Act: What Rights Do Copyright Holders Have? | • Minimal modifications. Tone/structure changed to accommodate different style of graphics |
## Overview of modifications cont’d

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<td>The Balancing Act: What Can I Do As a Copyright User in Education?</td>
<td>The Balancing Act: What Can I Do with Copyright-protected works?</td>
<td>● Took a deeper dive into fair dealing, outlining two tests and six factor analysis</td>
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<td></td>
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<td>● Briefly outlined other education exceptions available to users</td>
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<tr>
<td>What Do I Need to Know About Licensing?</td>
<td>What Do You Need to Know About Licensing?</td>
<td>● Deeper look at library licensed content and permitted uses (generally)</td>
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<tr>
<td></td>
<td></td>
<td>● More context to given to collective society licenses (particularly Access Copyright / Copibec)</td>
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<tr>
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<td>● Obtaining a transactional license, other other licenses you might encounter</td>
</tr>
<tr>
<td>How to Copy “Left”</td>
<td>Openly Licensed Material</td>
<td>● Almost entirely new content focusing on Creative Commons open licences</td>
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Legal accuracy

• Original scripts developed by colleagues managing or aligned with copyright portfolios. Also vetted by legal counsel.
• Updates to scripts reviewed by Michal Jaworski, Partner and Co-Chair of the Higher Learning practice group at Clark Wilson LLP
Creation process: narration

- Narration recorded at UWO’s ITRC; reviewed by professional voice actor; will be hiring professional to re-record.
- French translations: broadens audience; translations vetted; edited for Quebec context; professional voice actor; videos soon complete
Creation process: mock-ups
Timelines

- Original timeline: complete the project by the SuperConference
- New timeline: Everything ready by the ABC Copyright Conference in June 2020 so that institutions can use the course for the Fall 2020 term.
  - Even with careful planning, this project took more time than expected.
Preservation & revision

- All production files saved
- Facilitates revision
- Will be available for download
Adapting

- Hope is that community will use these modules as-is, or adapt them
- Consider what your institution needs
  - A resource to point to?
  - Modules built into your LME?
- We’re hoping to learn from you!
We’d like to hear from you! A few questions for you.

1. Grab your phone
2. Go to www.menti.com
3. Enter the code 29 96 92 and vote!
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Thank you!