# OER Publishing Project Toolkit

This toolkit is for librarians and project managers who support faculty authors who are creating and publishing OER projects. It’s designed to be used at the project level, offering templates and resources work for working with authors linearly, as the project progresses.

# Author Consultation Phase

It’s helpful to meet with an author at least once before they begin writing. What expectations do you each have about the process?

[Author Guidelines](https://docs.google.com/document/d/15YsPoTbbGRAThRIX4kGlzS62SeCpKAsKVQjhPzmF2lo/edit)

These Portland State University Libraries author guidelines detail the requirements that authors must follow when working with the publishing team. Consider adapting this document to fit your institution’s needs.

# Writing Prep Phase

Before the author begins writing, we suggest sharing templates and style guides with them.

[Faculty Author FAQ](https://docs.google.com/document/d/1Me9W6YpXIAIC24MAx-9_fmsnDs0UtFcCJkePLCYXAg8/edit#heading=h.kfgc0ghy9aj7)

Here are some common questions you can anticipate from faculty authors.

[Textbook Elements](https://canvas.umn.edu/courses/377173/pages/list-of-pedagogical-elements?module_item_id=9770854)

This list includes common pedagogical elements used in textbooks. It is organized in three sections: openers, integrated pedagogical elements, and closers. An author may want to consider how to incorporate some of these elements based on their writing style and discipline.

[Editorial Style Sheet: Base APA](https://docs.google.com/document/d/1JxaW4nix4aCY-oR3TdjiT5YiDO_ZKszZGLI1nMH60Dg/edit)

Providing an author with a style sheet ensures consistency within the OER. Style sheets help authors organize and format their writing, and are integral to editing and proofreading.

[Editorial Style Sheet: Base CMS](https://docs.google.com/document/d/1y9IQEQCt77JqedNV3W0fLhgAEgZgpQr8-fq5Msxoxzg/edit#)

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[OER Content Tracker](https://docs.google.com/spreadsheets/d/1E6LtZR5t6xQ_NtQf4D6X9Mr9oGt15xoXtKkdnNOEWZw/edit?gid=1184586745#gid=1184586745)

This spreadsheet template helps an author keep track of different resources including images or other media they may be incorporating into their OER. It includes a column for licensing information, its location within an OER, and whether any actions need to be taken with said media or source.

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# Writing Phase

During this phase, ask the author to provide an early sample chapter. Use it to confirm license compliance and style guide usage. Regularly check-in with authors, at least every six weeks.

If you’re providing content and design support, you could consider building out the first chapter in whatever tool you’re using (for example, Pressbooks). This is often a helpful visual demonstration of the final product.

[Textbook Writing Tutorial](https://canvas.umn.edu/courses/377173/pages/developing-textbook-structure)

This tutorial provides an example of a traditional textbook structure including sections on pedagogical objectives, organization, and chapter structure. Authors can use this tutorial as a sample guide if they want to follow a traditional textbook format for their OER.

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# Production/Publication Phase

[Author Email Templates](https://docs.google.com/document/d/1FsK3sjrKLuUqN0c56fbNqa2s5oR6qtHQIelwld1LHkg/edit#heading=h.kw4sgneggt9s)

These are templates for project managers who work in the production and publication of OER. These templates are guidelines for communicating with OER authors on various production level needs.

[Checklist of typical production activities](https://docs.google.com/spreadsheets/d/1GmFs_7GILPEUsZ5phAEiOcxNz3DFSGaVtbUWJdXYMRI/edit#gid=0)

This checklist is divided into four sections: cover/front matter, accessibility, editing/proofreading, and marketing and distribution. Each section has a list of common items and tasks to complete during the production phase of publishing an OER.

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# Marketing Phase

[OER Marketing Checklist](https://docs.google.com/document/d/1kwF9my18FCrQt0vNzcyCc_TbX-ihlwL4w-0XZ6nQyQ4/edit#heading=h.pinchfu9y6my)

Use this checklist as a way to raise awareness about the new OER you’ve published.

[Submit to the Open Textbook Library](https://open.umn.edu/opentextbooks/books)

Once the OER is complete consider submitting it to the Open Textbook Library. Review the four criteria to ensure your title is a fit.

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# Maintenance Phase

[Tracking adoption form](https://forms.gle/eiTfFbeAPrY1f33t9)

Use this form to track the number of adoptions for your OER. This can be an important data point to collect for usage statistics.

[Errata/feedback form](https://forms.gle/XGhTvurzfi8VX28X7)

Use this form to collect any errata, edits, or feedback regarding your OER. Also consider adding a versioning history, and tracking usage statistics.