The Cookbook

A discussion on the process, pitfalls and successes of hacking an open textbook

Executive Summary

This document represents the process and reflections on the creation and curation of an open source 'texthack' for a media studies textbook for students in Australia, New Zealand, and the Pacific. This document is provided as a resource for anyone contemplating a similar texthack project. Suggestions on processes and issues for consideration are presented along with information about successes and difficulties of this specific project. The final curated 'text' this document refers to can be found at: http://mediatexthack.wordpress.com.
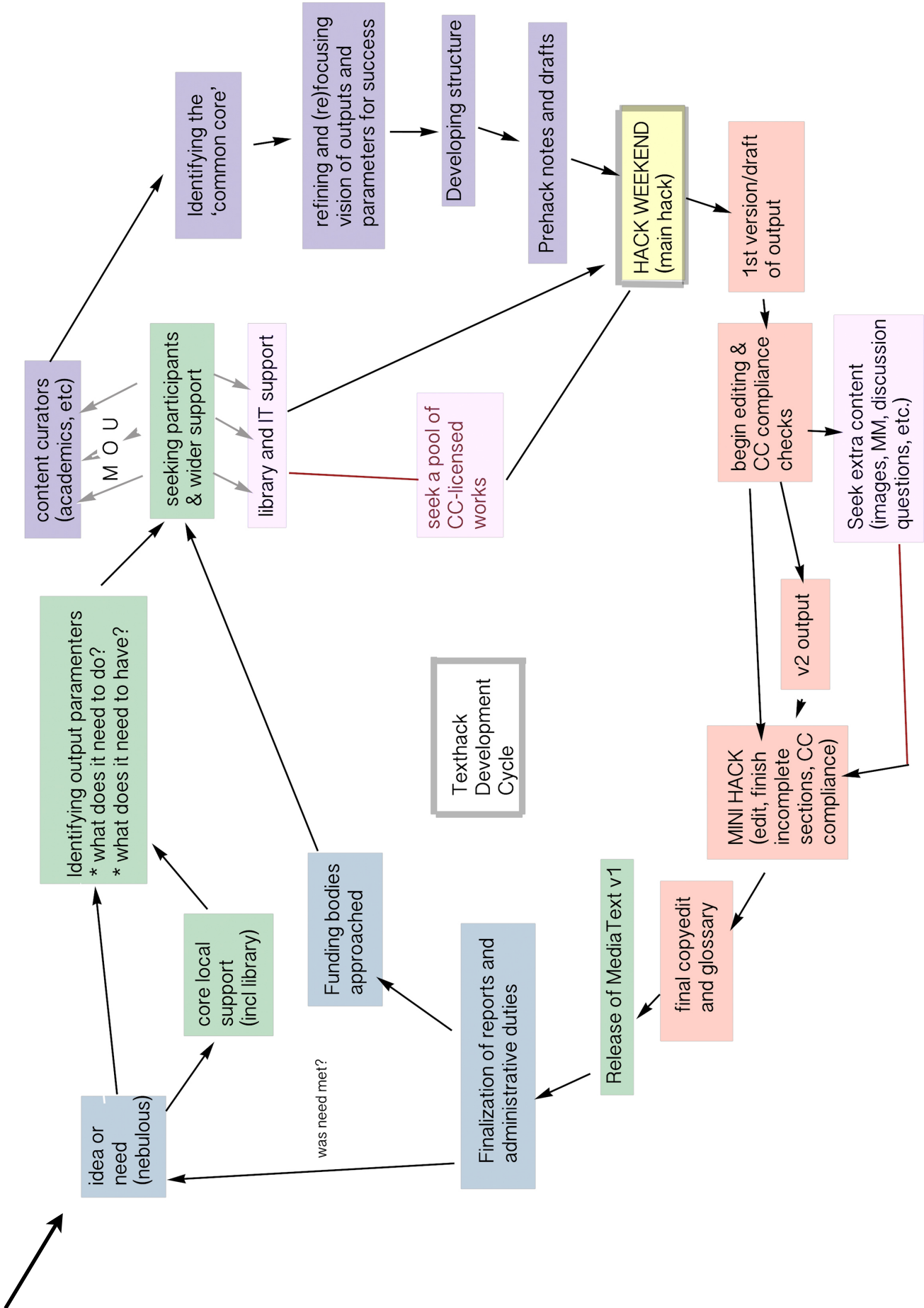
Contents

idea or need (nebulous)

Identifying output paramenters
* what does it need to do?
* what does it need to have?

core local support (incl library)

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M O U

seeking participants & wider support

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Identifying the 'common core'

refining and (re)focusing vision of outputs and parameters for success

Developing structure

Prehack notes and drafts

HACK WEEKEND (main hack)

1st version/draft of output

begin editing & CC compliance checks

Seek extra content (images, MM, discussion questions, etc.)

seek a pool of CC-licensed works

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MINI HACK (edit, finish incomplete sections, CC compliance)

final copyedit and glossary

Release of MediaText v1

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Funding bodies approached

was need met?

Texthack Development Cycle

Background and Context

Open Education is an idea that has risen in profile significantly since the turn of the century. From institutional and corporate leaders like MIT and Connexions, to more independent and context-specific projects, there have been a number of initiatives which challenge existing models of mass education and the creation of educational resources. **Open Educational Resources (OER)** is a term used to describe resources made freely available, including texts, course materials, even syllabi. Common across all of these initiatives is the desire to open up access to education and resources important to the communities they seek to serve.

On the weekend of 16-17 November 2013, a group of academics and librarians across Australia and New Zealand got together virtually to collaboratively write or '**hack**' an **open textbook**, known as the main **texthack** project. The team was inspired by a group of Finnish mathematicians who wrote an open mathematics textbook in a weekend [see: http://www.edudemic.com/finnish-teachers-writing-entire-math-textbook-3-days/]. The texthack project sought to continue the OER ideas of high-quality, free to access educational materials targeted at a specific audience. Funding was sought from **Creative Commons** (CC) (via the New Zealand office) for an open source textbook that would address an underserved population – namely, media and communication studies at late secondary/ early tertiary level in the New Zealand, Pacific and Australian regions. Given the specific terrain of the discipline, alongside the small student populations, there is only a limited range of texts available for students to use, thus the area seemed ripe for a new approach, such as OER.

Early reviews of the field did not uncover much in the way of process guides to create an OER, and the few indications of possible guides available seemed geared more to science/mathematics books; subjects which feature equations and laws that are unchanging across cultural contexts (see end for annotated bibliography of useful works). By contrast, media and communication studies, as taught in the region, is centred on questions of culture and communities using a range of theories and approaches. It is these theoretical tools and concepts that formed the basic structure of this project, though the content itself is geared to a regional context. Different disciplines may find other structuring approaches work better for the needs of their discipline.

In the lead up to, and throughout the process of the texthack, questions of language and approach also became more critical. Words like 'book' and 'author' seem ill-suited to the needs of a hacked text – even 'text' itself is somewhat problematic. Over time, a new lexicon emerged from the group – collaborative resource rather than book, **curator** rather than author, section rather than chapter. Even

Some Useful Terms...

Open Educational Resources (OER): resources such as textbooks, course materials and syllabi made freely available. See:
http://www.oercommons.org/about

hack: [noun] an activity where you refine or improve an existing idea or product; [verb] to refine or improve an existing idea or product.

open textbook: a textbook that seeks to break free of all current technical and legal restriction access issues by being free to read, reuse, adapt and distribute worldwide.

texthack: where multiple people come together equally to manipulate and curate information and ideas to create a new and useful body of work.

Creative Commons (CC): See: http://creativecommons.org/about

curator(s): the participant(s) who guide, organize, and make sense of the information for the open textbook.

these terms have limits, and it may be a question for the wider texthack community as to what kind of descriptions are preferred. Wider suggestions include labels like 'composer' but there is still currently no consensus lexicon. For simplicity's sake, 'text' will be used here to refer to the finished resource in totality, and curators refers to the various participants who contributed to the final work.

This labeling issue came out of a larger question around structure and need. The process of hacking the text uncovered deeply held assumptions about the role of text and narrative in a digital, open-source era. Were participants still authors in the sense of 'creation', or were they engaged in authorship as pastiche, pulling together ideas, issues and examples and stitching them together into something 'new' and useful for readers? Should participants be named, or should contributions pass through many hands and reflect a consensus effort? The process of hacking, and of learning to take advantage of the multi-media affordances of the platforms selected to run the open textbook through, changed our understandings of the role of the curator; we found ourselves tending towards notions of curation, where one who pulls together other texts (such as video clips or images) and draws the readers' attention to the underlying links and concepts. In doing so, the role of sense-making, and the authority that conveys, shifted much more fully towards the reader. In doing so, a much more hypertextual, interlinked, multimedia OER emerged.

However, this open textbook is also an object in transition, and so nods towards traditional linear narratives also crept in - passages and sections can be read in sequence like chapters, and the frontispiece invites the reader to engage with it like they would with a table of contents. Only once the reader is in the body of the text can they start to move more independently, to take ownership of their reading. How much other hacked texts lean towards one readership position or another may affect how their hack is structured. The process of hacking a textbook together forces the creators (whether they tend towards authors or curators or something else entirely) to confront questions of process and structure, readership and bricolage, intent and channel, to a level not normally considered within the existing book production process. Anyone considering hacking a book, for any reason, is strongly encouraged to reflect on those questions well ahead of commencing a texthack, as they will influence everything from content structure to how the text is presented to its intended audience.

The following steps reflect our path towards the final product. We make no claim to them being reflective of any kind of 'best practice,' but rather offer this information to help future texthack projects avoid our errors and build on our successes.

Sidenote

OER is used here as a catch-all term for all open materials. The phrase Open CourseWare (OCW) is a newer term relating specifically to open and free material for university-level education, including content, planning materials and evaluation tools. As our project targeted both tertiary and secondary students, we will use OER inclusive of OCW.

The Recipe

Here is a brief overview of the ingredients and the steps we followed to make our text

Ingredients

Curators/participants, project manager, common core, information to hack, MOU/ Agreement, platform or space for hacking, platform for final content

Pre-Production	Production	Post-production
1 identify need and audience	**7** employ pomodoro sprint technique to initiate texthack	**11** embark on copyediting
2 appoint project manager and recruit curators		**12** fine tune study and self-guided reading questions
3 prepare MOU and identify common core	**8** employ peer review, communal editing and resolve technical issues	**13** check license status and citation of all CC materials
4 consider format, platform and structure of text		**14** hyperlink sections and glossary/ index
5 identify appropriate CC-licensed materials to embed	**9** seek out and use appropriate CC-licensed materials as appropriate	**15** create ISBN record through National Library, and from that create the bibliographic record
6 orientate curators and their tasks in tracking or project management documents	**10** project manager to centrally track all updates	**16** Declare project complete and release to audience

This project emerged out of a convergence between a desire to engage in the OER/texthack dialogue, and an identified lack of a suitable text for first year tertiary media and communication studies students in the New Zealand/ Pacific/ Australian context. Through discussions with library, copyright, and teaching staff, it was articulated that the lack of a suitable text centred around questions of culturally-appropriate examples and theories/concepts taught in the existing syllabi. This were compounded by the small potential audience for such a text, meaning that it was unlikely that this need would or could be met by existing educational publishing infrastructure. The situation seemed right for a texthack experiment.

After seeking and receiving funding support from Creative Commons, the project cast around for examples of best practice. At that time, there were no obvious or centralised repositories or lists collating information on text hacking, or best-practice examples available.   Some more have emerged over the course of the project and a suggested reading list is provided at the end of this document [see Appendix 1]. But at the time of the genesis of this project, the most famous examples came from mathematics and the so-called 'hard' sciences, and there was little information available about the processes that created these texts as far as we could find.
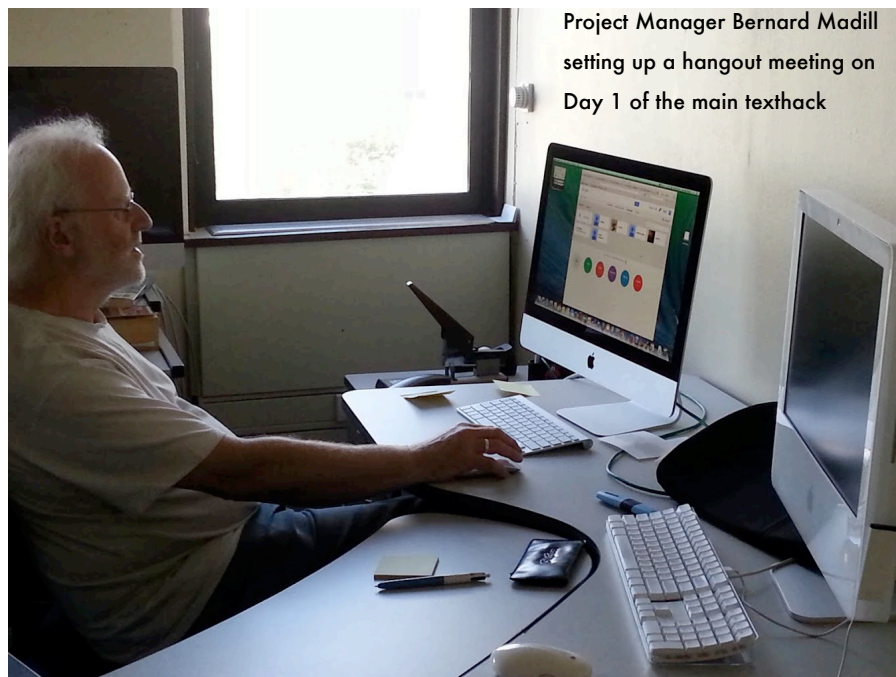
Furthermore, due to geographical constraints and limitations on travel for our participants, it was realised that this texthack would need to be conducted virtually using network tools including voice/video interlinks, shared document and editing facilities, and asynchronous communication such as email. To date, we have yet to identify any other major texthack project that was run entirely virtually, and the remote nature of this project did drive some of the decisions made about the operation of this texthack that may not be relevant to co-located texthack groups.

Project Manager Bernard Madill setting up a hangout meeting on Day 1 of the main texthack

Sidenote

The emerging profile of OER means that they are not (yet!) part of standard university publishing practices.

In a 'publish-or-perish' academic climate, there is still a way to go to prove the value of OER creation, and this may affect the 'buy in' of participants working in such an environment, who do not fully understand or perceive the 'value' of OER to their careers or publication profiles.

There remains a wider question of where OER sit in the schema of publication. As more OER emerge, this question may resolve itself, but, at the moment, curation work such as with an OER has an unclear status in the publishing landscape.

Some Useful Terms…

common core: general topics recurring across courses that form the common issues to be represented within the work.

memorandum of understanding (MOU): a document that describes the agreement between two parties as to the nature of work or contribution component. For an example, see Appendix two.

Reflection

Working with a hacked text forces a reflection on the needs of both students and teachers. It is also a great space to think about the *format* and *platform* of content delivery and desired outcomes.

With these issues in mind, a project manager was appointed and tasked with facilitating this virtual collaboration. The first step after setting out these parameters was to seek co-participants. Given that this project had a geo-cultural element, participants were sought only from the Pacific Islands, New Zealand, and east and central Australia. Collaborators were not sought from the west coast of Australia or south-east Asia as, with the management of the project based in New Zealand and a tele-conferencing structure planned for the hack, it was thought that the 5-hour-plus time difference would be too disruptive to be a worthwhile investment of resources.

Issues arose during the recruitment process due to the lack of general awareness as to what a texthack was, and whether it was a valuable use of time for participants. The primary participants targeted to join the collaboration were academic staff employed in some capacity with universities in the region. As such, there were institutional pressures on these individuals, who were obviously unclear about how this work would contribute to their research and publishing outputs if they were to participate in the texthack. Resistance was also encountered from those who had a prior professional or economic interest in existing published textbooks. In light of these issues, it is perhaps unsurprising that the majority of the participants were early-career researchers, with a strong cohort of senior postgraduate students who felt freer to participant in, what was to many, an 'experimental' output. A small core group responded to the open call (sent to relevant academic departments across the region) and after a **memorandum of understanding (MOU)** was agreed to, an asynchronous email-based discussion developed around questions of content and focus. Emerging from this, the participants shared their syllabi and what came to be known as the **'common core'** was identified – the general topics that recurred across all courses. From that, themes emerged

and, after several drafts, the 'common core' was structured into four areas, each area representing two or three related topics. This formed the basis of the 'table of contents' reflected in the frontispiece of version one of the online text. In different contexts, such as for a high school audience, this common core might come out of national standards, or be found in the gaps of existing texts and teaching resources.   Missing from this early conversation was a more detailed discussion about the format, platform, and structure of the text.   On reflection, the participants were all carrying with them old practices and ways of scholarly writing and the structural frameworks of existing, traditional, textbooks. As more OER and hacked texts emerge, and as users and creators come to grips with the new tools and modalities available, the dominance of these frameworks could ease. In the meantime it is important to recognize and interrogate these assumptions early in the process to ensure that all participants have a shared vision of the text they are hacking.

The final concern in these early stages, which is tied to these questions of framing and assumptions, is the balance of leadership and collaboration. Again, without clear models and guides to follow, there were moments when participants were unsure of their footing. For example: whether they needed to follow a 'leader' or follow a more collectivistic and nonhierarchical process.   In this project, as the participants became more familiar with each other, we fell into a collectivist model based on negotiation and group consensus, though it may have been worthwhile to more explicitly frame this consensual understanding as the desired operation model from the very beginning.

There were also some questions and confusions about the operational functionality of the various CC-licenses, especially when considering the potential international reach and draw of the work. These concerns became more pressing as, over the course of the project, the vision of the text shifted from a somewhat linear, book-like format delivered via PDF, to something far more hypertextual, interlinked,

	A	B	C	D	E	
1		link	initialization	COMMENTS	Wordpress	sec
2						
3	**Reading Media Texts**					
4	Analysing texts: theory and method	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing				
5	Semiotics & Language	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing	erika	REALLY super rough notes that Need More Theory :)		
6	Communication and Culture	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing	Martina	concentrating on intercultural and organisational cultures so far, happy for anybody to add other dimensions :)		
7		https://drive.google.com /file/d /0BziGX1JNPi97TlhUMDktM /edit?usp=sharing				
8	**Culture and Contexts**					
9	Ideology	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing				
10	Discourse and Institutions	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing	team otago			
11	Democracy and Public Spheres *	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing	team canterbury		team canterbury	
12	Media Effects *		Khin	Have written on Hypodermic needle model Minimal effects model/Two-step flow model Starting on Users and gratification model & Strong effects model Adding hyperlinks to YouTube videos to Pavlov's Dog, Orson Welles' War of the Worlds, Bobo Doll experiment.	Erika, Khin, Martina	
13						
14	**Production * and Structures**					
15	Political Economies (Old/New)	https://drive.google.com /folderview?id=0B8KcdXuyB: usp=sharing	Sy	notes: half written 1st draft - apologies to anyone who pickes this shambles up		
16				I'm thinking about splitting this into a chapter on technologies and another on			

FIGURE 1: Initial tracking document, with (l to r) page title, link to shared document, first pass notes, then collaborators' notes as others enter the document to add or review content.

and curated out of existing materials. One of the strategies to negotiate this was to embed CC-licensed materials (after confirming license status to the best of our abilities) and only linking out to non-CC material or work that had a confused provenance. For example, if CC-licensed material was not available or could not be confirmed, a link was provided to where that material was hosted, and a note was added to the OER's CC license acknowledging these 'holes' in our ability to assign CC rights to the work overall.

In the pre-production months, several technological questions had to be addressed. Because this hack was operating virtually, and there was no physical connection between most of the participants, all collaboration spaces had to be online. It was decided that, despite their limitations, the Google Drive™ service and Google Hangouts™ would be used as primary points of connection alongside email. This was mainly due to an existing familiarity with the services (especially Google Drive™). Some issues arose due to the need for Google+ signup to use Hangouts™, especially in video mode, but these were managed by the project manager in collaboration with individual participants. Other options that could have been used included Dropbox, file sharing services, and Skype, though these too had their limitations. In addition, there were shared concerns in using a corporate service for an OER. This was an issue that reoccurred throughout the life of the project and so will be discussed more thoroughly in the next section.

At this stage, with this basic infrastructure in place and a 'common core' as guide, participants elected to assign themselves topics and areas and began to compile notes, outlines and ideas in each of the shared document folders.   To facilitate management, a spreadsheet was also created in the collaboration space that used hyperlinks and a process checklist to manage and track edits and changes (Fig 1). This spreadsheet remained current up until the weekend of the hack itself, at which point the collaborators transferred to a more detailed tracking spreadsheet administered by the project manager (Fig 2).

The virtual tracking documents became increasingly important as participants were confirmed. In the original plan, it was envisaged that locales would host small teams (such as on-campus or in a major

FIGURE 2: The expanded tracking document

city) who would collaborate with each other as well as with the wider team. However, due to issues affecting buy-in from academic staff mentioned earlier (such as publishing pressures), in the end the majority of the participants were working in geographical isolation. Apart from the team at the host institution, only one other institution had two participants, and up until the first day of the hack itself, they worked apart before agreeing to meet up to work collaboratively on the second day. Their experiences, especially when contrasted with the experience of the host institution team, reinforced the value of having at least partial in-person collaboration as at least one component of the overall collaborative process. But because most were working in isolation, the tracking document became the primary way to monitor activity. The in-built text-based chat function of the Google document tool was also used to supplement the video conference calls on the day and to retain a kind of ambient awareness of other participants and their activities.

The hack weekend itself was run across a Saturday/Sunday in late 2013. Unlike some earlier hack projects, which were residential in nature, the virtual collaboration meant that this hack had to be more tightly scheduled and structured. The first day started with a video hangout – for most of us, this was the first time we had seen or heard our fellow collaborators! A substantial conversation followed laying out the consensus plan for the rest of that first day.

Day one borrowed a modified **'pomodoro' technique,** a sprint structure involving bursts of hacking facilitated by the project manager. Participants 'met' virtually to discuss various areas, and then logged off the video call to 'write' a section, using the textchat function to ask quick questions, get clarification, or to bounce an idea off a colleague. This was repeated several times across the course of the day. With each video check-in, we looked at what others had done, discussed ideas or issues that had emerged, and prepared for the next sprint. Across the course of this day, we also developed a strong rapport as collaborators, despite the virtually mediated engagements, to the point where the Google Hangouts™ (with a

Useful Term…

pomodoro technique: a time management technique that involves working in short increments (typically 25 mins) with periodical breaks (typically 5 mins). This method is thought to encourage more focus and creativity and less mental burnout. (see: http://pomodorotechnique.com/)

Tip

Project management is essential for tracking collaborations and contributions, especially in the processes of peer reviewing, so it is worth spending time and effort setting up a system for this, and familiarizing all participants in how to use it to manage their contributions.

built-in animation function) became not only playful spaces, but also spaces where participants felt comfortable raising concerns and issues not only with each others' content, but also with the text overall. It was from these types of discussions that we decided to modify our approach for the second day of the hack.

On the second day of the hack, concerns were raised that we were reproducing a traditional textbook rather than taking the chance to innovate with the form. From this came a fruitful discussion about authorship versus curation - using our collective skills, knowledge and expertise to create a bricolage, multimedia hypertext rather than act as 'authorities' writing and rewriting the existing narrative. This led to a stronger commitment to incorporate the plethora of existing material – especially emphasizing CC-licensed material – in our curated text, even though it was often difficult to source material relevant to our context and content under this license.

From this, it became very clear that early tentative plans to release the OER as a PDF through an online (library) depository would not work with the text that was emerging. This ties back to the earlier comment about planning for look and feel and structure as well as content and focus. Having come to this conclusion much earlier would have allowed the work to be far better tailored to the capacities of the content management system Wordpress, a platform that became the final home of version one of the text.

Wordpress was chosen for a number of reasons, including political/ ideological issues (commitment to open source/access) as well as more pragmatic reasons such as multiple user access and the support of a wide range of multimedia components. Again, if this decision had been made much earlier, it would have allowed more time to set up the site (including questions of installation location, domain name, etc.) as well as better tailor the workflow elements (such as the spreadsheet and the shared doc system) to dovetail more neatly with the techno-design affordances of the Wordpress system. The same concerns would need to be addressed whether it were a PDF, a Moodle-type system or some other platform used. No matter the approach, it is important not to under-estimate how much the container shapes the content structure.

The shift to Wordpress enabled a far greater use of external materials than had previously been envisaged. This gave a far greater scope for curation and reference to practical examples within the communities we were addressing with this work. However, this also gave rise to significant issues regarding linking, copyright, and access. The goal for this OER was to use appropriate CC-licensed material wherever possible. However, much of the material deemed suitable, appropriate, or useable, was not released under CC, or the validity of

The copyright cautions on this image of de Saussure @ wikimedia clearly warn of possible copyright issues, but not all image notifications are as clear
http://en.wikipedia.org/wiki:File:Ferdinand_de_Saussure_by_Jullien.png
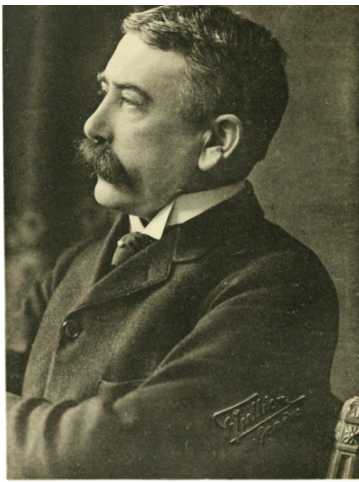
Size of this preview: 406 × 599 pixels. Other resolutions: 163 × 240 pixels | 325 × 480 pixels | 407 × 600 pixels | 520 × 768 pixels | 694 × 1,024 pixels | 1,448 × 2,136 pixels.
Original file (1,448 × 2,136 pixels, file size: 2.53 MB, MIME type: image/png)

Expand view

This is a file from the Wikimedia Commons. Information from its description page there is shown below.
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Summary [edit]

Description	English: The Swiss linguist Ferdinand de Saussure (1857–1913)
Date	before 1913
Source	Indogermanisches Jahrbuch
Author	"F. Jullien Genève", maybe Frank-Henri Jullien (1882–1938)

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File history

that license could not be confirmed (such as people reposting material without permission and applying CC-license tags even though they were not the copyright holder and did not have the authority to do so). In other cases, the copyright holder could not be ascertained at all. Decisions had to be made as to how to work with such materials. It was decided to embed material that was correctly CC-licensed, adhering to any license conditions that may have been imposed.

These issues raise an important consideration for future hacks: at the moment, particularly internationally, CC-licensing has not become common across the board. This is compounded by the fact that traditional copyright licenses are still the default for many media hosting sites (like Youtube). Uploaders and creators have to actively seek out the CC license. Furthermore, in many cases there are issues with who holds the copyright or the right to upload at all, as material is recorded, reproduced and remixed without consistent reference to the original rights holder. It becomes the responsibility of the curator to seek out and make judgments on the license status of any work they may wish to include, a time-consuming and labourious task that was not anticipated in the planning of this hack.

These copyright issues exacerbated an expected problem: a lack of culturally appropriate (and in some cases, culturally-sensitive) raw materials, to either embed or reference. This is, in part, a continuation

Tip

Copyright standards and expectations vary across formats and from the diversity of sources available to a texthack. It is advisable to structure into your plan, sufficient time to evaluate the copyright provenance of external sources, just as you would evaluate their critical or pedagogical relevance.

of the problems that triggered the creation of this OER in the first place: comparatively small and remote populations (and markets) have limited resources for creating, archiving, and making accessible cultural products and ephemera. In many sections, there was limited (often low-quality) access to the materials that could be used in examples, and in some areas (such as those relating to technologies) no local examples at all could be sourced. While anticipated in the earlier production plans, the expanded multimedia focus of the final OER meant that this was more obviously lacking. As more resources become available, it may be possible to fill these gaps in future versions with more local content. Again, these issues are more detrimental to projects that have a strong local/cultural focus, and may be less of an issue with other types of content.

The second day of the main text hack kept some aspects of the 'pomodoro' structure, but increased the rotation of meetings to deal with these copyright issues, and to negotiate editorial changes and structural questions (such as order of sections). As a result, the second day also had a much stronger element of peer review and communal editing, as sections changed hands rapidly in order to polish, focus and revise the work to the highest standard possible in the time available. Consequently, there were technical issues that needed to be addressed, which included managing multiple editors working in documents, as well as connectivity issues due to the very limited broadband access in NZ as compared to many other places around the world. The use of Google Hangouts™ (in video mode) did consume a lot of bandwidth and restricted some participants from fully accessing the virtual communal spaces. This in turn had an impact on their effective ability to edit and to participate in the communal production process.

In addition, the second day also featured a more concerted effort for both consistency across sections, and interlinking between sections, as participants became more familiar with sections that had been initialized by others. Though a style guide had been discussed and agreed to in the broadest terms, this guide was soon discarded as it had been geared more towards the PDF/repository version of the 'book'. In short, that guide did not fit the emerging form and structure, and would be another aspect that should have been considered much earlier.

Further to this, it became clear that participants were taking different approaches to referencing; some sections came with a bibliography, some with links, and some with few explicit references at all. This reflects different writing approaches and the speed of creation, as well as disregarding the detailed style guide in favour of a simplified structure guide of marrying theory with regional examples followed by discussions and guided by a hypertextual relationship with other sections.

The texthack weekend concluded with a significant core of material written to either first or second draft stage, though there were noticeable differences in format and style, from highly curatorial sections, which accumulated large amounts of external matter, to far more linear, chapter-style sections with only limited external material. In most cases, these sections also included regionally-appropriate examples, though again the depth and integration of these examples varied across the sections. An innovation that came out in the pomodoro period, to include discussion questions for each section, had also been applied to a minority of finished sections.

Following the hack weekend, the participants contributed some time to follow-up with sections in their areas of expertise, as well do some basic peer-reviewing, copy editing, and formatting (especially with the examples and discussion questions).

During the post-production period, the unevenness of the text, the variance in number of examples and discussion questions, the obvious need for a glossary, more interlinking, and other readability factors, plus a number of empty sections, became increasingly apparent. In concert with university librarians, a second 'mini-hack' was organized with the goal of filling in these gaps (particularly in regards to the examples) with CC-licensed materials. This mini-hack was held on location (as opposed to the virtual nature of the main hack) and featured librarians and postgraduate students working in the area. This mini-hack (about six hours) introduced these new participants to hacks, the CC-license suite, and the search tools needed. Over the course of this second hack, two empty sections were written up to first draft status, and several new examples, illustrations, and extra materials were curated and added to other sections already in progress. Alongside this, the tasks of peer-review and copyediting, as well as layout revision, were greatly advanced. The participation of two liaison librarians greatly enhanced the range of material found that was appropriately licensed as well as relevant for the topic at hand. Not only did they have the sophisticated searching and information management skills, they were also able to share these skills with other participants, and advise them on issues encountered. Existing examples were also checked for license compliance. All changes continued to be tracked on a master spreadsheet.

Out of the original plan, the order of topics remained consistent, even as the amount of interlinking between them increased. Another part of the project that owes its roots to more traditional book publishing, and which actually increased in importance, was the glossary. Given that the reader would now more likely be actively navigating their own path through the material than reading linearly, linking to key concepts and having an easy to use glossary became critical. It could no longer be assumed (as with a more linear book) that readers will have passed through prior sections. Therefore, all key terms had to be referenced for easy checking/refreshing. It is not inconceivable that future hacks will take advantage of e-reader platforms and software to embed

Tip

In planning an event through to post-production, it is useful to include time and resources for editing and layout design tasks, to ensure maximum quality and readability. It is also advisable to have time to deal with any potential technical or copyright issues. This may include a minihack, as we tried here, be built into the main hack structure, or the post-production period.

Reflection

The two hack events highlighted the benefits of concentrating effort and resources into short but intense bursts of activity to produce large amounts of relevant content. Again, *who* is participating influences heavily *what* is produced in these intensive events and how much editing and post-production there needs to be subsequently.

'dictionaries' and key term definitions right into the text itself, to save even the clickthrough away from the section of interest.

For this texthack process, the task of editing represented a long-tail, as participants slowly dropped off the project or had only sporadic post-hack involvement to begin with. At this stage, a dedicated project manager was crucial in chasing up promised edits and revisions, maintaining and updating the tracking document, and monitoring sections yet to be edited. In our hack, the project manager also took on an active role in maintaining both meta-data, running the technical aspects of interlinking, pulling out existing definitions from the text to form the core of the glossary, building and maintaining hyperlinks between sections, and testing the operational experience of the text.

The maintenance of the workflow document was an unglamorous but critical part of the process and its importance cannot be understated. The texthack is a complicated package, with multiple contributors, and each section progressing at its own pace. Whereas in traditional publishing an editorial board (often made up of nominal 'experts' or 'authorities') could act as final arbitrators of a 'finished' work, the texthack operated much more collectivistically. The tracking document gave all participants the opportunity to get the big picture of the whole project after working so long in their various specialties.

The decision to declare the project complete was decided by assessing the point of diminishing returns – at what point would the effort of editing exceed the return on investment in the finished product. After a final pass for correction errors (especially in linking and navigation), the project was declared open ('beta version 0.1,' as one team member called it) via press releases announced by Creative Commons New Zealand.

In hindsight, it would have been appropriate to approach the National Library for an ISBN number much earlier in the process. Such a number would have then streamlined the creation of bibliographic records that could be added to library catalogues.

News of the project was released through official press releases, through CC bulletins, and more informally through social media and word of mouth. This helped support the last stage of the project, which was to find an audience for the text. The project began with a supposition, based on professional experience, of a lack of suitable resources. Though textbook adoption can sometimes be a slow process, it would be interesting to see at least where the early adopters came from. Unsurprisingly in hindsight, a large group of early adopters came from senior high schools, especially those who ran their own media departments. Though the specifics of their adoption is obscured by their use of the text within closed Moodles or other password-protected online learning support tools, we can track hits back to Wordpress. Given however that one of the features of the

release license is that people can take, pull apart and re-edit the text, it might be that soon these teachers and schools will be hosting their own internal copy of relevant parts of the text, hidden in these secure sites and beyond our ability to track.

Furthermore, on release, contact was made by project leads at the OpenBCCampus project [http://open.bccampus.ca/about-2/] who were interested in both the content of the Media Studies OER and the process of creating it. This project suited their wider mandate to create open and flexible learning resources for Canadian students. Since their open-source initiatives have formal support, OpenBCCampus had in place infrastructure to support the production and dissemination of open texts and OER. Through discussion, OpenBCCampus offered to host the PressBook version of the text on their PressBook server. This meant that, alongside Wordpress (based on posts and pages), readers could now also download the entire text in ePub (software) or for a mobile device. These new reading options should increase the potential readership for the text, including international audiences. Moreover, as the profile of these kinds of resources grows (such as with governmental support as in Canada), the potential readership will also develop.

As of early 2014, the site had received thousands of hits from dozens of countries, and feedback had been received requesting (depsite the CC-BY notice) the adoption of sections in both secondary and tertiary programs.

Sidenote

The social side of texthacking

The human factors in texthacking cannot be overstated. The strength of the collaboration has a huge impact on the nature of the output. As was demonstrated in this case, trust and collegiality were vital components for the overall success of the project. All curators and participants need to be comfortable in collaborating, and feel they have an equal say in the project, and be confident in raising questions or concerns at any stage of the 'recipe.' This is very different to the editorial processes typical of mainstream book production, and needs to be considered in pre-production when setting out parameters or any agreements or MOUs for all participants.

The Issues We Encountered
(and how things might be done differently)

As one of the participants noted at the end of the main hack, 'we've spent a day and a half solving problems.' Text hacks can evolve in many different ways, and not all solutions, ideas and practices outlined in this document will work for every hack, or represent best practice. They are offered here purely as a starting point, as a way of helping more hacks get off the ground.

Given that the core intention of this project was to provide high quality resources for others to reuse and remix as needed, CC-licenses were a vital component. It is hard to envision a curatorial OER without such tools available. However, CC-licenses are not evenly distributed across all types of media and content, and along with issues of fair use, there is still some confusion on both sides as to how to apply and use CC-license conditions. As CC-licenses continue to spread, and awareness is raised about how to use and apply them, this issue might diminish; for example ArchivesNZ is making great strides to incorporate CC-licenses into their archival processes. In the meantime it is important for participants in a texthack to check and recheck CC-license sources and conditions to ensure they comply with the conditions of the rights holder(s). It is possible that demonstrations of use, such as OER and texthacks, may increase the spread and adoption of CC licenses more generally.

Either way, a curatorial approach to OER needs to be built into its action plans, MOU, and development frameworks in order to facilitate the collection and checking of CC materials. In future projects, collections might even commence prior to the hack itself (perhaps through a minihack as we did subsequently) to create an archive of useable material for hack participants to tap into during the hack process itself.

The production for the main texthack might also serve a secondary purpose, in training participants how to better use and evaluate CC-licensed materials, and how existing tools can be leveraged to incorporate this material into the chosen platform. This would mean that less time is used in the hack itself coming to grip with the tools, leaving it free to be used purely for manipulating and curating content.

One of the issues with any kind of content creation is grappling with the 'blank slate.' For this project, the collation of the common core provided the necessary structure required to overcome the blank slate and frame the creation and curation process. An archive of usable material might have been another way to tackle structure and initialization, and would probably have lent a different slant to the project.

Further to this, the inclusion of discussion questions for self-guided learning was a late addition to the project. Starting much earlier with these questions might not only have reshaped the structure and interlinking components, but also reframed the project more solidly in the space between authoritarian and collaborative content. It was important for us that the content we curated was reliable and trustworthy, but at the same time was not excessively authoritarian or closed.

As discussed above, attracting key personnel to the project was a vital component to its overall success. Again, due to the still-emerging profile of OER, and their place in the academic and publishing landscape, senior academic faculty were sometimes resistant to participate in the project. This resistance lessened substantially as the project's profile grew nationally. However, those that did join the project did so in a spirit of open collaboration, exploration and play, and that proved as vital to the project's success as their academic credentials. A diverse mix of staff (including library and research staff) would be one important element of future hacks. Given the strong emphasis on peer-review and collective writing and editing, the final product was still one that met the expectations of high quality content and engagement.

This collaboration was facilitated in this case by the project manager, whose role evolved over the course of the project to take on much greater responsibility. Ultimately, the project manager position facilitated connections, wrote and circulated the memorandum of understanding (MOU) which outlined involvement and positions, documented all correspondence and managed the tracking documents. The project manager also helped maintain consistency in areas of the text such as the study questions and the glossary. The project manager worked with the writing teams closely to coordinate the different areas of expertise and different writing styles to drive a more consistent whole.

More difficult in the long run was the continuing question of infrastructure. The project management, sharing and publishing were all facilitated through third-party services. For much of the project, the team was reliant on overseas corporations to provide the sharing infrastructure. At the moment, especially for participants new to the open source movement, there is little choice in tools that satisfy the needs of collaboration and hacking. As the number of OER and hack projects grow, perhaps new tools will emerge to serve this population that are an ideological as well as technological fit.

Many of the issues encountered in this hack relate back to being an experiment, and a new(ish) idea trialed with participants for audiences who did not have much, if any, prior experience with OER and hacks. As more hacks are attempted, some of these teething issues will be mitigated. What is important to remember is that these outputs are to serve an audience, and with the flexibility of CC licenses, this content may expand and grow beyond its initial seeding conditions.

Conclusions

This document has tracked the issues, changes and challenges facing hacking a media textbook. The experience of producing a texthack emphasised a number of issues that still need resolving, and hopefully this 'cookbook' demonstrated that there are multiple approaches to curating such a text depending on context, intent, and availability of resources.

That said, overall, this project should be seen as a success. The project produced a curated, multimedia text under a CC-BY license that at least goes some way to meeting the needs of media students in the region. Early feedback from students suggest that the focused nature of the text, the relevance to their curricula, the diversity of regionally-appropriate examples and the hypertextual structure are all useful in their own studies. Furthermore, the remarkably high level of uptake at the secondary level suggests that there was a need for such a resource at that level that was as great - or perhaps even exceeded - the need at the tertiary level. Basic online metrics show a sustained level of use of the text from not only across the region but across the globe. Plans to port the text in a modified fashion into the Canadian context suggest that this project will have a life beyond the regional focus.

In conclusion, despite the difficulties outlined above, which could be expected of any novel project, the curation of this text, and the hack process that drove it, was deeply worthwhile and a highly valuable experience that led to a useful and important output for both those who wrote it and the students and classes that continue to use it.

Authors

Written by Erika Pearson with support and contributions from the Texthack Collective and the Advisory Group, and the assistance of Katherine Miller-Skillander. 2014. CC-BY

This is not an exhaustive list, but these links and resources may help those new to the idea of texthacks and Open Educational Resources (OER) to explore the sphere.

Sources and Background Information

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UNESCO and the Paris Declaration on 'World Open Educational Resources'. http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/Events/English_Paris_OER_Declaration.pdf

EDUCAUSE. (2011). Seven Things To Know About Open Textbook Publishing. http://www.educause.edu/library/resources/7-things-you-should-know-about-open-textbook-publishing

World Bank Open Knowledge Repository. https://openknowledge.worldbank.org/

Connexions. http://cnx.org/aboutus/

Open Educational Resource Commons. http://www.oercommons.org/

Texthacks, OER and Platforms

Open University (UK) Open Content Initiative - http://openlearn.open.ac.uk/

Rice Connexions - http://cnx.org/

Carnegie Mellon Open Learning Initiative - http://www.cmu.edu/oli/

Commonwealth of Learning - http://www.wikieducator.org/Main_Page

UNESCO Open Training Platform - http://opentraining.unesco-ci.org/cgi-bin/page.cgi?d=1

MIT OCW - http://ocw.mit.edu/OcwWeb/web/home/home/index.htm

National Repository of Online Courses - http://courserepository.org/index.html

Guides,'Cookbooks' and Aggregate Lists

Wikicommons Guides to OER Index: http://wiki.creativecommons.org/OER_Policy_Registry/Supporting_Documents

Wikieducator Tutorial on OER: http://wikieducator.org/Open_Educational_Content/olcos/PRODUCE_%26_REMIX

The Wikieducator Handbook:
http://wikieducator.org/OER_Handbook/educator

APPENDIX TWO: Example Memoranda of Understanding (MOU)

This is an example of the MOU that was used in this project. Different projects may need to amend some areas of text depending on intent or context.

1. Parties to the Memorandum:

2. Research Project Funding Body:

3. Title of Research Project: TextHack 2013

4. Dates of Research Project: August 6, 2013 – December 1, 2013

5. University's Key Staff and Contact Details:

[project lead]

[project manager]

6. Collaborator's Key Staff and Contact Details:

 [collaborator details]

7. Description of Project:

This project, supported by a grant from Creative Commons International, plans to bring together a number of institutions with a strong communications/media studies undergraduate program to hack together an introductory textbook that will be made available under a CC-BY license in a digital repository. The goal is to produce the core of a rigorous, regionally-appropriate and useful text, and to document and evaluate the process for future projects in the Humanities.

8. Brief Description of Research Collaborators Role:

• Each collaborating team will co-ordinate their academic personnel (staff and postgraduates) to produce their sections of the text, and liaise with their local IT and library support to help them participate in the online planning and progress sessions, as well as the November 16-17th hackathon weekend itself.
• The text will be the equal responsibility of the collaborating teams, with equal ownership of the final text, under a CC-BY license.
• Each collaborating team will also record (visual, audio or written) their progress and experience as part of the documentation project, also released under CC-BY.
• No funds will be paid by the University of Otago to the collaborator

9. Facilitators (The personnel and groups that make it happen)

Central coordination and administration of the project will be based at the University of Otago including:
• Central infrastructure to help facilitate communication and collate and store the outputs in an accessible format.
• An educational technologist.
• Liaison librarians to help with research,
• Together these will
   Manage connectivity between teams, (in concert with local support staff and
   Provide information resources and copyright advice.
   Make the final text available through its digital repository.

10. Governance:

This project will be governed by:
• The collective nature of its process.
• The MOU and Project Plan will outline each participant's responsibilities.
• Management will be by the Steering Group,[named]

11. Copyright:

As per the Head Agreement which states:
"all original material produced pursuant to this grant will be made available under a Creative Commons Attribution 4.0 international license or CCO public domain dedication."

Any publication (including electronic) referring to or resulting from this grant will acknowledge the support of Creative Commons International. It is a condition of the grant that the finished text, 'cookbook' and final report will be released, and publically available, under a CC-BY

Attribution 3.0 License or 4.0 License (when released). This license allows for the commercial use of the text so long as attribution is respected. Full text is contained in:

• License Deed http://creativecommons.org/licenses/by/3.0/

• Legal codes http://creativecommons.org/licenses/by/3.0/legalcode.

Signing indicates agreement with the conditions contained in these links.

Any related scholarship participants undertake after completion of this project will be that participants own Intellectual Property.

Signed: _____ Date: _____

Authorised signatory of the [Home institution]

Signed: _____ Date: _____

Authorised signatory of the Collaborator