

OSIER project –checklist to use before upload

This document sets out to identify the features needed to ensure that a resource can be used in OSIER under Creative Commons licence CC-BY-NC-SA. The document comprises two sections:

- Three tables that describe conformance with the OSIER requirements against four criteria
- Notes on the criteria

1. OSIER requirements for OERs uploaded to the project repository

The listing is colour coded. The green list describes a resource that is ready for inclusion. The amber list describes a resource that does not meet requirements in some way, but can be changed easily to conform. The red list describes a resource that is unlikely to be eligible for inclusion, usually for copyright reasons.

1.1 Green list – ready to go	
Copyright and authorship	<ul style="list-style-type: none">• Copyright and authorship are identified clearly
Creative Commons licence	<ul style="list-style-type: none">• The appropriate Creative Commons licence is identified• The CC licence is incorporated into the resource where possible• Any exceptions to the CC licence are identified clearly
Third-party materials	<ul style="list-style-type: none">• Third-party materials are identified clearly and acknowledged as specified by the copyright holder• Where possible, third-party material is licensed under Creative Commons• If specific permission to use the material has been obtained, this is documented and lodged with OSIER
Accessibility and usability	<ul style="list-style-type: none">• The resource meets accessibility and usability criteria that match the standards set for the repository site, eg following TechDis guidelines for MS Office files• Where possible and realistic, alternate presentations are made available, eg transcripts for spoken audio files

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1.2 Amber list – needs attention before submission	
Copyright and authorship	<ul style="list-style-type: none"> • Although copyright and authorship are not identified explicitly, this can be rectified without any ambiguity
Creative Commons licence	<ul style="list-style-type: none"> • Creative Commons licence not identified, but there is no bar to using a CC licence • CC licence not embedded in the resource, but this can be done (where practical) • Exceptions to CC licence need to be specified
Third-party materials	<ul style="list-style-type: none"> • Third-party materials are not identified clearly and acknowledged or licensed as specified by the copyright holder, but it is practical to do so • Specific permission to use the material has not been obtained, and is not documented and lodged with OSIER. However, this can be rectified easily • Effective alternatives to unlicensed third-party materials can be provided either by substituting new CC-licensed materials or referencing external sources • In a few cases, the risks associated with the use of third-party materials may be so low as to be considered worth proceeding without 100% certainty
Accessibility and usability	<ul style="list-style-type: none"> • The resource fails to meet accessibility and usability criteria that match the standards set for the repository site, eg following TechDis guidelines for MS Office files, but relatively minor changes will allow the material to conform

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1.3 Red list – probably beyond help	
Copyright and authorship	<ul style="list-style-type: none">• Copyright and authorship cannot be established, or are contentious
Creative Commons licence	<ul style="list-style-type: none">• A Creative Commons licence cannot be specified (typically because of issues with third-party materials or copyright and authorship)
Third-party materials	<ul style="list-style-type: none">• The resource is wholly or extensively reliant on third-party materials, for which permission cannot be obtained and where substitution or referencing are not viable options• Third-party materials include very high-risk elements, such as well-known photographs or graphics, that would almost certainly result in serious consequences if copyright infringement is discovered• Third-party material could be considered defamatory or offensive
Accessibility and usability	<ul style="list-style-type: none">• The resource fails to meet accessibility and usability criteria, and it will either be impossible or very labour intensive to make it do so

2. Notes on the resource criteria

These notes amplify the criteria used in the listings in Section 1. More detailed information on these topics is available from the project wiki (<http://osierproject.pbworks.com/>) including links to authoritative websites on copyright, licensing and accessibility.

2.1 Copyright and authorship

If you are the author of an item, you are likely to hold copyright. Common exceptions are:

- Material created as part of your employment may be copyright to your employer – your contract of employment should explain this
- Material included in a commercial publication are likely to be copyright of the publisher
- Material created as part of an externally funded project may be copyright of the funding body. Alternatively, the funding body might have specified that the material should be freely licensed.

If you do not hold copyright, you need to seek permission of the copyright holder for permission to release the material as a freely-licensed resource. You should be able to provide evidence of this permission. It is the responsibility of the author of the resource, or the person uploading it to the OSIER repository, to obtain permission. The OSIER project will not normally deal with copyright issues.

You should include a copyright statement in your resource. OSIER provides template pages that can be added to word processor documents, presentation files and spreadsheets.

For further information see <http://osierproject.pbworks.com/w/page/32381886/IPR-and-licensing>

2.2 Creative Commons licences

There is a range of Creative Commons licences that offer users various levels of permission when they download and use or re-use a resource. Creative Commons licences do not replace copyright: they simply state the conditions under which material can be used without needing to seek permission from the copyright holder.

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The default Creative Commons licence used in the OSIER project is CC-BY-NC-SA. This indicates that someone using the resource must:

- Attribute it to the author (BY)
- Not use it as or in a commercial product (NC = 'non-commercial')
- Release any derived resource under the same licence terms (SA = 'share alike')

Details of this and other CC licences can be found at:

<http://creativecommons.org/licenses/>

The CC-BY-NC-SA licence logo is included in the template pages for OSIER resources (see the end of this document for an example).

2.3 Third -party materials

Third-party materials are items that are included in a resource but where the author does not hold copyright. The author cannot licence these items as part of the Creative Commons licence without explicit permission from the copyright holder.

Parts of a resource can be excluded from the CC licence, or can be included under a different licence from that applied to the remainder. If this is done, it must be clear what is excluded.

If it is impossible either to identify the copyright holder or to obtain permission from a known copyright holder, the resource author may chose to:

- Remove third-party material from the resource
- Replace third-party material with comparable freely-licensed objects
- Assess that the risk of copyright infringement arising from retaining third-party material is slight, and explicitly exclude the third-party material from the CC licence

OSIER will operate a take-down policy, whereby a resource may be removed from the repository if a copyright holder other than the author makes a valid complaint that the resource has been released under a CC licence.

2.4 Accessibility and usability

It is important that OSIER resources meet common standards of usability and accessibility. See also

<http://osierproject.pbworks.com/w/page/34312803/Accessibility-and-usability-guidelines>

2.4.1 Word processor documents (eg Microsoft Word)

Must have:	Should have:
Sans-serif font	No italic text
No background images, watermarks	No text boxes
Page numbers and other repeated information in headers and footers	Headings set by document styles, with a consistent hierarchy
	Consistent list styles

2.4.2 PDF (Portable Document Format) documents

Should be saved as tagged PDF (machine-readable text with standard heading tags – see <http://webaim.org/techniques/acrobat/>).

If created from word processor documents, the original files should satisfy the conditions set out here.

2.4.3 Presentations (eg Microsoft PowerPoint)

Must have:	Should have:
The minimum necessary number animated effects on slides and transitions between slides	Slide notes
Consistent layout templates, with accessible colour schemes	
Sans-serif fonts for all text	
Be understandable as self-contained objects, or supplied with explanatory text	

2.4.4 Spreadsheets (eg Microsoft Excel)

Must have:	Should have:
Sans-serif font	Complex calculations broken into explicit elements
Column and row titles, with freeze pane used to ensure that these remain visible if it is necessary to scroll	
Charts located in separate worksheets, rather than floated alongside data	
Individual data tables contained in separate worksheets, and clearly indexed	

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This resource has been released as part of the OSIER project, which is promoting the use of resources to support the training of practitioners in Education for Sustainable Development and Global Citizenship within the curricula of all of the home nations of the United Kingdom. You can find out more about the project on the 'About' page of the project repository site.

OSIER is part of the second round of the UK OER (Open Educational Resources) programme, funded by HEFCE and administered by the Higher Education Academy (HEA) and the Joint Information Systems Committee (JISC).

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