

POCKET Transformation Guidelines

Developed from the original document '*Transformation Guidelines for Academic Transformers-Version 3.3*' Prepared by Giselle Ferreira, Nick Heap, Tina Wilson and Patrick McAndrew for the Open Content Team – 03/08/06

The Integrity Model

Any materials submitted to the OpenLearn platform must conform to the **integrity model** proposed by Andy Lane, which states that:

All the material in the Unit is recognisably very similar to the original material and as complete as possible with the ability to study it in exactly the same order as the original. In practice, this means slicing existing text into smaller portions, each of which delivered as a text page or pdf, with activities translated into an interactive form, and other resources such as audio clips added to it rather than being delivered separately.
As quoted in: Ferreira *et al.* (2006)

The Transformation Process

The transformation process can be viewed as a series of stages, amongst which Ferreira *et al.* (2006, p. 2) highlights the following as essential:

1. Skim read the material and identify the key pattern
2. Review the existing content
3. Identify and plan essential changes
4. Implement changes consistently with the integrity model
5. Prepare text for Unit 'Introduction' (word count: 200 words)
6. Finalise the initial review form

In general, the materials that are produced as open educational resources are for people to learn from and also for others, such as teachers, to take and rework for their own situation. Consequently, other educators need to be considered as well as the learner's perspective. One of the issues that this raises is how the materials are described, and the potential impact on how materials will be reworked once they are available in the LabSpace. The stages above reflect these two aspects of our work on open educational resources and, therefore, combine different perspectives.

1. Skim-read the material and identify a key pattern

A patterns approach can be used to describe what the material is trying to achieve, as well as describing the key ways in which this is being done. This type of information will help change the course material into open content. Therefore an initial analysis of the course content should be carried out to think about how it works

and organise these thoughts by completing the initial review form. This should also help to identify aspects of the material that must be retained to maintain integrity.

2. Review

This stage is a process of identifying elements that might require change. The method adapted by the Open University for OpenLearn was to annotate a printed version of the PDF file using a marker pen. A similar approach has been adapted by POCKET.

Focus areas for this stage:

- **Learning Outcomes:** If the learning outcomes refer to a whole block, rather than just the extracts you are looking to transform, they may need to be adjusted and new learning outcomes written.
- **UK-specific terms:** Within the scope of an integrity model transformation and to meet the open content approach, some explanation of UK-specific terminology should be provided as appropriate.
- **Forward and backward references:** Existing references in the unit to previous work or courses should be removed.
- **References to supported learning:** Any references to 'tutorial groups' and 'tutor' in association with activities, are inappropriate for the Open Content context and should be highlighted.
- **Structural elements** (e.g. Sections, subsections, changes of topic within a section): It is important to consider the way in which material is sectioned. Depending on the size of sections, further work with the unit may be needed in terms of further sectioning. Please see the notes in the section 'Stage 3' for more details on structure.
- **Activities:** Some activities (e.g. Group discussion) are not meaningful within the Open Content context and, so, need to be replaced (if and as appropriate). Alternatives should be suggested – only in exceptional circumstances should the activities be removed. Another factor to be aware of is that answers and feedback to any self-assessment activities should be included in the material. It is also helpful to have a study time guide on how long users should expect the activity to take them to complete.
- **Unit title:** Ideally the title should be short and contain the subject-specific words that appear in the text (especially in the 'learning outcomes' section).

3. Identify and plan essential changes

The above areas should be used as a starting framework for approaching the transformation:

- **Learning outcomes:** These may need to be adapted to the specific extract used for the unit. Any changes made to the learning outcomes should be flagged in the initial review form.
- **UK-specific terminology:** Any acronyms and terms used in the material should be explained.
- **Forward and backward references:** A possibility here is simply to remove the reference and related text. This however needs to take into consideration the overall idea of the integrity model. According to this approach, further materials (from other courses or portions of the course) cannot be added, which, in practice, limits what can be done to remedy

references. The important thing to keep in mind when making decisions here is the need for a compromise between the 'ideal' you might like to create and the integrity model as a practical requirement.

- **Supported learning terms:** Any deletion of these terms should take into account the overall 'philosophy' of the integrity model of transformation. It may be the case that terminology such as 'discuss <something> with the tutor group' could be replaced without affecting the integrity of the material whilst still being meaningful within the context of Open Education (e.g. locate the forum/discussion area for <theme> and <do something like introduce yourself and let others know you're studying <a course> within the theme>').
- **Structural elements:** The sectioning of material in terms of XML tagging will be reflected in the Moodle environment, as the XML file will be rendered as a collection of linked HTML files presented over a specific design. Two aspects that are relevant to structure are:
 - i. The amount of scrolling that may be required for viewing a section
 - ii. The study time required

A simple rule of thumb might be that no section should require more than a given study time, possibly 1-3 hours, in one sitting. Similarly, we might like to avoid lots of very small sections. It may be useful to draw up a table of contents for the Unit, based initially on the existing sections/subsections, and note down estimates of study time per section, as an aid to planning. The notes you will have made in stages 1 and 2 regarding structural elements might also be helpful. Bear in mind activities associated with the teaching text when thinking about study time as well as figures. Images will need to be reviewed to assess if they are still appropriate.

- **Calculating study hours**

To calculate study hours for individual units follow the following calculation:

Time originally allocated to the material + 5% for new learners to the topic + lengths of any video and animation used + total activity time = total study hours for unit

- **Audio-visual material and animations:** It may be the case that activities or tasks related to AV material are appropriate or acceptable when the medium is a VHS tapes or a DVD, but inadequate when web delivery is used. Work revolving around AV and animations therefore, may require some consideration.
 - It is helpful to include the length of any AV material used in the unit, so this can be included in the XML file and communicated to the learner.

4. Implement changes in the XML file

Once the required changes have been outlined the relevant modifications to the text and tags in the XML file should be made. Here it is important that no further

functionality provided by Word is used and that no notes or comments are added to the file. Remember to check section, figure, table and image numbering if any have been removed from the file.

5. Prepare text for Introduction

The OU XML schema includes the element <Introduction> within two different contexts: as a child-tag of the <FrontMatter> element; as a child-tag of the <Section> element. The content of <Introduction> within the <FrontMatter> section will appear as the top page of the Moodle rendering of the material, that is, this content will be the first thing that readers should see when accessing a particular Unit. Therefore, this ('Sales Pitch') 'Introduction' needs to be succinct yet sufficiently broad to give a flavour of what the Unit is about. The word limit for this Introduction is 200 words.

6. Finalise the initial review form

Having completed the modifications to the text, review and complete the final review form. This should provide a pattern that matches the transformed unit.

7. Final review stage

The Final Review form will be completed once the material has been XML formatted and is just about ready to be uploaded onto the LabSpace. It will be most beneficial if this form can be completed by someone who has not yet been involved in the transformation process, but who has a sound knowledge of the material (e.g. Head of subject department).