

Learning Resource Exchange (LRE) Operations

European Schoolnet (EUN) is at the forefront of global initiatives related to the exchange and interoperability of digital learning resources. With the commitment of its participating Ministries of Education and support from European Commission research programmes, European Schoolnet is continuing to build a Learning Resource Exchange (LRE) service for schools that enables teachers and learners to access and use educational content from many different countries and providers.

The Learning Resource Exchange was developed by European Schoolnet and its supporting Ministries of Education as a result of work in a number of EC-funded projects (particularly CELEBRATE, CALIBRATE and MELT). This resulted in the launch of the LRE as a publicly available service in December 2008.

At the European Schoolnet Steering Committee meeting in November 2009, Ministries recognized that, while the LRE had initially been designed as a service primarily for MoE, regional authorities and other organisations were also active LRE partners. In this context, Ministries in the EUN Steering Committee agreed that a new LRE governance mechanism should be put in place to allow for the fact that increasingly regions, municipalities and other educational content and tools' providers might wish to join the LRE.

At its meeting on 26 May 2010, the EUN Steering Committee duly created a LRE Subcommittee to define the strategy and operational rules of the LRE and to manage its ongoing development.

This document created by the LRE Subcommittee defines a set of operational rules for LRE stakeholders.

1 Article 1: General Provisions

- 1.1 The Learning Resource Exchange (hereafter - LRE) operational regulations (hereafter - Regulations) regulate the LRE status, conditions and procedures for LRE content, metadata, users' rights and the obligations, and responsibilities of organisations that accept to become LRE partners.
- 1.2 The basis for these regulations is a series of decisions taken by Ministries of Education in the European Schoolnet (EUN) Steering Committee in its meetings of 22 April 2008, 26 September 2008, 22 April 2009, 25 November 2009 and 26 May 2010.
- 1.3 The LRE is a service provided by the EUN Partnership aisbl.
- 1.4 The main objective of the LRE is to provide teachers, pupils and other members of the educational community with access to information about digital teaching and learning resources. In order to achieve this objective, the LRE provides Ministries of Education, regional and municipal authorities, learning platform providers and other relevant stakeholders with access to content in a network of learning content repositories together with associated tools that allows them to more easily exchange learning resources that can be used by teachers in different countries. Mechanisms will also be put in place, linked to EUN initiatives and projects, to allow teachers to upload their own resources to the LRE.
- 1.5 A key objective of the LRE Subcommittee is also to provide a knowledge building community and forum within which LRE stakeholders can exchange information and keep abreast of global initiatives related to the exchange and interoperability of digital learning resources and develop best practices related to the implementation of relevant international standards.
- 1.6 The operations of the LRE are controlled and steered by a LRE Governing Committee (hereafter - LRE Subcommittee) established as a subcommittee under the existing statutes for the EUN Consortium (Article 14) and EUN Partnership (Articles 6 and 10).
- 1.7 The day-to-day operations and ongoing development of the LRE are carried out by the EUN Office in Brussels under the direction of the EUN Executive Director and the LRE Subcommittee.

2 Article 2: LRE Subcommittee

- 2.1 Membership of the LRE Subcommittee is open to both public and private sector organisations that agree to the LRE objectives.
- 2.2 There are three types of LRE partners:
 - Founding Partners - Ministries of Education participating in EUN.
 - Associate Partners - Territorial, regional and municipal education authorities; commercial and public sector content providers; tools' providers, including learning platform providers; other stakeholders deemed relevant by the LRE Subcommittee.
 - Affiliate Partners – Organisations, typically involved in content aggregation or federating repositories at international level, that are invited to join the LRE by the LRE Subcommittee.
- 2.3 Both Founding Partners and Associate Partners will pay an annual fee (that can be included as part of an ongoing EUN membership or business partnership fee), as decided by the Subcommittee and have voting rights (one vote per organisation) in terms of Subcommittee decisions. Affiliate Partners do not pay an annual fee and do not have voting rights.
- 2.4 The LRE Subcommittee will meet at least twice a year. All LRE Founding and Associate Partners can attend and can give a proxy to another member if they cannot attend. All Founding, Associate and Affiliate partners can propose items for discussion at Subcommittee meetings but must do so at least one month prior to the meeting.

- 2.5 Decisions to accept new LRE partners will be approved by the LRE Subcommittee following a simple majority vote involving all LRE voting partners. Both Founding and Associate Partners will have one vote each. Affiliate Partners and LRE Subscription members do not have voting rights.
- 2.6 An LRE Subcommittee Chair will be elected bi-annually from among the LRE voting partners. The Chair can be either a Founding Partner or Associate Partner.
- 2.7 Each Founding and Associate LRE Partner will be invited to participate in a LRE Technical Advisory Board (TAB) that will be Chaired by EUN. , The LRE Subcommittee can also choose to invite Affiliate Partners to join the TAB. The key TAB responsibilities will be to:
 - o Review the technical developments proposed for the LRE by different partners.
 - o Make technical recommendations to be approved by the LRE Subcommittee.
- 2.8 Decisions related to the operation of the LRE, including the setting of an annual work plan, will be taken by all LRE voting partners (both Founding and Associate Partners will have one vote each) and will require a simple majority vote.
- 2.9 Proposed changes to the statutes of the LRE Subcommittee and the Regulations can be made by both Founding and Associate Partners but any changes will require a majority decision by all Founding Partners.
- 2.10 LRE Founding Partners can decide to terminate the development and maintenance of the LRE on the basis of a simple majority vote by all LRE Founding Partners.

3 Article 3: LRE Partners

- 3.1 An open call will be published on the LRE portal inviting organisations to become LRE partners.
- 3.2 Organisations seeking to join the LRE are required to complete an application form provided by EUN that provides details on why they wish to participate and how they intend to use LRE content. Organisations wishing to contribute content to the LRE must also provide information describing their collection(s) and their metadata along with examples of resources, metadata and other relevant documentation (i.e. application profile) for review by EUN staff.
- 3.3 Applications to join the LRE will be circulated to LRE Founding and Associate Partners as these arise. New members can be accepted as soon as over 50% of current LRE Founding and Associate partners confirm in writing that they accept the applicant organisation.
- 3.4 Organisations that are accepted as LRE partners will be asked to sign a letter confirming that they agree with the LRE objectives and Regulations.
- 3.5 LRE Founding and Associate Partners are entitled to contribute to the development of an annual LRE work plan and help shape the longer-term LRE strategy.
- 3.6 The names of all LRE partners will be published on the LRE web site.
- 3.7 Organisations joining the LRE as Founding or Associate Partners agree to pay an annual LRE membership fee (that can be included as part of an ongoing EUN membership or business partnership fee), as decided by the LRE Subcommittee.
- 3.8 Organisations can also apply to be LRE Subscription members for one year (at a reduced annual fee); this level of temporary membership is a first step towards becoming an LRE Associate Partner and is primarily open to smaller organisations that wish to explore the added value of being part of the LRE. These organisations must also follow a similar application process as defined in articles 3.1 to 3.4.
- 3.9 By becoming a LRE Founding or Associate Partner, organisations can further their own objectives by having access to a technical infrastructure that supports a wide range of strategies

to collect and expose metadata and provides a number of important associated tools and services. Benefits for LRE partners include:

- Access to the complete LRE collections.
- The ability to promote and disseminate their own resources via the LRE.
- The right to use the LRE logo to indicate that they are members of the LRE federation of repositories and content providers.
- Support and, if required, training from EUN technical experts on content repositories, semantic interoperability, applying open licensing schemes and content access controls.
- Support and, if required, training from EUN technical experts in how to exploit LRE tools and services (e.g. for metadata and vocabulary management).
- Information and advice related to content standards and specifications.
- Participation in the LRE Technical Advisory Board.
- Links to relevant global initiatives.
- Participation in an internationally recognised, knowledge building community.
- Opportunities to participate in EC-research projects and to benefit from the results of this research.

3.10 LRE content providers can opt to have their metadata remain within the central cache of LRE metadata even if they decide not to renew their membership of the LRE Subcommittee. In these instances, EUN will regularly monitor the quality of this metadata and, based on this monitoring, the LRE Subcommittee will decide whether such metadata remains part of the LRE collection.

4 Article 4: LRE Technical Support

4.1 EUN is responsible for providing technical support to LRE partners and Subscription members. LRE Founding and Associate partners will receive a higher level of technical support than Affiliate Partners or Subscription members. The specific levels of technical support are as follows :

For LRE Founding and Associate Partners that are content providers:

- Preparatory discussion with LRE representative
- Up to 5-day support on-site including
 - One-day seminar for provider staff on LRE protocols, application profile and tools
 - LRE metadata application profile mapping
 - Assisting local team with the LRE connection
- Remote follow-up support by the LRE technical team (email / skype)
- Bug reports
- Feedback on use of provider's resources by LRE users (bi-monthly)

For LRE Founding and Associate Partners that are content consumers:

- Access to the LRE using multiple protocols (e.g., SQL, OAI-PMH) and metadata in customized format
- Up to 5 day connection support including:
 - detailed introduction to the available LRE metadata formats, protocols and tools (1 day)
 - assisting local team with the LRE connection
 - assisting local team with metadata cross-walk
- 1-month follow-up support (email / skype)
- Ongoing annual online support (email / skype, + rapid answer)

In addition to the specified levels of support, the EUN Office may, for an additional fee, provide added value services and support to LRE partners customised to their particular requirements. (e.g. could include training to schools in a municipality or region).

For Affiliate Partners and Subscription members that are LRE content providers

- Provider has preparatory discussion with LRE staff

- Customised one-day individualized training at EUN for provider staff (protocol + application profile)
- LRE metadata application profile mapping
- Remote follow-up support by the LRE technical team (email / skype) during the establishment of the connection
- Bug reports
- Feedback on use of provider's resources by LRE users (twice a year)

For Affiliate Partners and Subscription members and that are LRE content consumers

- Access to the LRE using multiple protocols (e.g., SQI, OAI-PMH) and multiple metadata format (e.g., LOM, ILOX)
- Detailed one-day introduction to the available LRE metadata formats, protocols and tools (1 day)
- 1-month support during connection period (email / skype)
- Ongoing annual online support (email / skype, + rapid answer)

4.2 All feedback on the use of resources will consist of summary statistics extracted from LRE log data but will not include any information from which specific individuals or schools can be identified.

5 Article 5: LRE Partner Obligations

- 5.1 When applying to become an LRE partner or Subscription member, all organisations will be asked to describe how they intend to use LRE metadata and for what purpose.
- 5.2 On becoming a LRE partner, organisations must nominate a member of staff who will serve on the LRE Technical Advisory Board.
- 5.3 All LRE partners are legally responsible for the quality and suitability of the content, metadata and information that they make available via the LRE. EUN provides only the infrastructure, tools and support that enables LRE content partners to make their resources available to a wider audience.
- 5.4 LRE partners submitting resources/metadata to the LRE must, wherever possible, obtain all relevant Intellectual Property Rights to the content and are required to submit the content under a Creative Commons or other form of open license. The preferred form of Creative Commons' license is cc-by-sa (Attribution Share-Alike).
- 5.5 Where EUN identifies problems with a partner's metadata or content, including broken links to resources, members are required to address and rectify these problems within one month of being notified of their existence by EUN. Failure to do so may lead to the removal of the partner's problematic resources from the LRE. All LRE partners also have a responsibility to notify EUN of any problems they detect with LRE metadata or content.
- 5.6 EUN is in the process of defining quality criteria that make it possible to more easily identify content that "travels well" and that can be used in different countries and pedagogical contexts. LRE content partners will be required to apply these criteria to their own content collections before selecting and submitting resources to the LRE.

6 Article 6: LRE Federated Content

- 6.1 The LRE aims to provide access to information about digital teaching and learning resources for schools covering all curriculum subjects from many different countries. Content from contributing LRE partners may include larger or more complex learning resources (including what are sometimes referred to as 'learning objects') as well as smaller learning assets (individual images, a short piece of text or a small audio file...).
- 6.2 The LRE particularly aims to make 'open content' (with minimum IPR restrictions) more widely available to schools. If required by the LRE Subcommittee, the LRE can also be adapted to enable content from commercial suppliers to be provided to all or some LRE users.
- 6.3 As indicated in article 5.3, all LRE partners are legally responsible for the quality, suitability and legality of content that they make available via the LRE and EUN will continuously monitor the content that can be accessed via the LRE
- 6.4 EUN will put in place mechanisms to monitor the quality, suitability and legality of content directly submitted by registered users to the LRE portal and has the right to remove any content that it deems unsuitable or likely to cause offense.

7 Article 7: LRE Metadata

- 7.1 The LRE provides access to information about digital teaching and learning resources primarily by collecting, enhancing and redistributing learning resource descriptions. These descriptions (also called "metadata") are structured according to standards so that machines can transport this information to users in a variety of formats.
- 7.2 The LRE makes use of controlled vocabularies that take into account the specific needs of educators and European education systems and maintains and utilizes a multi-lingual thesaurus (currently in 15 languages) to standardise the subject descriptions of learning resources.

- 7.3 The Learning Resource Exchange Metadata Application Profile uses the IEEE LOM Metadata standard and the IMS LODPE Information for Learning Object eXchange specification (ILOX) in combination with multi-lingual controlled vocabularies to meet the needs of educators at the K-12 levels in Europe. All LRE content providers are required to adopt the LRE Metadata Application Profile for resources they wish to distribute within the LRE federation. They are also obliged to maintain compliance with the application profile as it evolves. The current version of the LRE Metadata Application Profile should be obtained at <http://lre.eun.org/node/6>.
- 7.4 Updates to the LRE Metadata Application profile that impact on backward compatibility will require the approval of the LRE Subcommittee based on recommendations made by the LRE Technical Advisory Board.
- 7.5 LRE resource metadata will be made available in two versions. The first version will be a basic and limited version publicly available to anyone for harvesting. The second, will reflect the full LRE Metadata Application Profile (including all enrichments). This second version will only be made available to LRE Founding and Associate Partners. LRE Affiliate Partners may be granted access to this full and enriched version with the agreement of the LRE Subcommittee.
- 7.6 EUN will put in place mechanisms to monitor the quality of metadata and comments directly submitted by users in the LRE portal and reserves the right to remove any user-generated metadata or comments that it deems unsuitable or likely to cause offense.

8 Article 8: LRE Services to Users

- 8.1 The LRE is an infrastructure for exchanging learning content and its metadata. This infrastructure allows EUN and the other LRE partners to connect portals and other applications primarily serving K-12 educators.
- 8.2 The LRE federation may also be of use to other educational stakeholders, parents, cultural heritage organisations, etc.
- 8.3 There is no charge for using the LRE portal provided by EUN. This portal is publicly available and all content can be freely browsed by all visitors.
- 8.4 Teachers, learners and other stakeholders can register as an LRE portal user in order to have access to a range of additional functions: e.g. storing and sharing Favourite resources, rating resources, participating in LRE communities, submitting their own content, etc.
- 8.5 The EUN will put in place mechanisms, agreed to by the LRE Subcommittee, to check the quality and suitability of metadata/content submitted by users directly to the LRE portal.
- 8.6 Teachers submitting their own metadata/content directly to the LRE will be asked to apply an Attribution Share-Alike Creative Commons' license to their content where this is possible.
- 8.7 Personal information provided by users or collected during their use of the LRE service will enable EUN to improve the LRE user experience, including for the purposes of access control, tracking usage frequency, habits, preferences and settings, and for informing users about any developments and updates related to the LRE. In cases where any user data is provided to LRE partners, all personal information will be stripped from such data sets.

9 Article 9: LRE Maintenance

- 9.1 EUN will respond promptly to ensure that users have uninterrupted access to the main facilities of the LRE service.
- 9.2 EUN may at any time withdraw from service certain parts of the LRE to deal with breakdowns. EUN will make every effort to alert LRE partners of such actions by providing timely notice.
- 9.3 EUN may, after providing suitable notice, temporarily withdraw from service certain parts of the LRE in order to carry out necessary maintenance. EUN will, as far as is possible, ensure such maintenance activities are carried out at times when demand for the service is at its lowest.

10 Article 10: LRE Indemnity, Guarantee and Liability

- 10.1 The LRE service is provided by the EUN Partnership aisbl “AS IS” and on as “IS AVAILABLE” basis without any representations or any kind of warranty made (whether expressly or implied by law) including the implied warranties of satisfactory quality, fitness for a particular purpose, non-infringement, compatibility, security and accuracy.
- 10.2 The EUN cannot vouch for the correctness, quality, suitability or legality of the metadata or content provided by LRE partners.
- 10.3 LRE partners, indemnify European Schoolnet and the EUN Partnership against any metadata, content or information, that is made available by them for inclusion in the LRE, which constitutes an infringement of copyright or which is defamatory or which breaches privacy legislation.

May 2011