



OER FIELD GUIDE FOR SUSTAINABILITY PLANNING: Framework, Information and Resources

August 2019

Donna M. Desrochers

Contents

OER Sustainability Framework	3
Infrastructure	4
1. Guidelines	4
2. Processes.....	5
3. Professional Development.....	6
4. Platforms	6
5. People and Organizational Framework.....	7
Resources	9
1. Finances	9
2. Efficiency	10
Culture	12
1. Vision and Strategy.....	12
2. Metrics.....	13
3. Communication	15
Conclusion	16
References	17

This OER Field Guide provides information and resources to help colleges and universities implement sustainable OER programs on their campuses. Although “sustainability” is often interpreted as the financial resources necessary for continued support, it actually requires a broader conceptualization of resource requirements. The Guide presents a comprehensive OER framework built around ten individual components. When implemented as a coordinated system of integrated activities, it positions colleges and universities to sustain OER well beyond their current state or grant funding initiatives.

This Field Guide is not intended to address the fundamental building blocks of OER course development, such as identifying OER resources, understanding copyright licensing, and adopting or creating OER content. Instead, it describes the scaffolding that should be built to support those activities. This scaffolding allows OER to grow from a singular campus initiative to an integral part of the institution’s academic program.

The framework presented below is intentionally comprehensive. Colleges and universities may prefer to adopt a phased implementation, beginning with areas that either require the most development on their campus, deliver the easiest “early wins”, or represent the most logical approach based on their program’s current strengths and weaknesses.

OER Sustainability Framework

The OER Field Guide is organized around three core components of the sustainability framework:¹

- » **Infrastructure** – Building the campus guidelines, processes, and capabilities necessary to support OER;
- » **Resources** – Identifying the dollars or staff time required to support the work, as well as opportunities to conserve resources through efficiency improvements;
- » **Culture** – Using OER to support broad institutional visions and goals, including measuring and communicating OER successes.



¹ This OER Framework extends upon an initial framework developed by rpk GROUP as part of the Achieving the Dream OER Degree Initiative (Griffiths et al., 2018).

Infrastructure

The first component of sustaining early OER activities on college campuses is putting the necessary infrastructure in place to nurture and scale OER. Framing OER as another tool in the instructional toolkit can help leverage the creation of administrative policies and procedures, develop adequate technical platforms and professional development supports, and ensure faculty and staff are available to perform or oversee these activities.

1. Guidelines

Crafting formal OER Guidelines² acknowledges the institution's commitment to OER by clearly identifying the purpose and expectations for developing and using open materials in the classroom. At a minimum, OER Guidelines should:

- » Articulate the college or university's purpose for using open resources, and
- » Identify how the college or university's current OER activities comply with other state and system OER policies or regulations, and related campus policies or guidelines already in place.

Ideally, OER Guidelines would also set expectations for OER courses and summarize course development processes and supports. For example, they might specify OER course proposal, review, and approval procedures; identify available professional development and technical supports, and describe the requirements and responsibilities for receiving an OER course designation from the college or university. OER Guidelines should be developed in collaboration with appropriate campus stakeholders, including campus administrators, faculty, and leaders in the campus OER initiative.

Colleges and universities may have previously developed policies or guidelines for other campuses activities, such as online learning or campus technologies, which could serve as a model for OER. For example, many colleges have established course development guidelines and review checklists for online courses which might be adapted for OER use.



Guideline Resources and Examples:

- Tidewater CC – OER Policy
- The University of Edinburgh – OER Policy
- Lumen Learning – OER Policy Development Tool
- South African Institute for Distance Education – OER Policy Review and Development Toolkit

² In the OER community these guidelines are often referred to as "OER Policies." The term "OER Guidelines" is used in this Field Guide to describe institution-based approaches at SUNY campuses, which are distinct from formal Policies set and approved at the SUNY System level.

2. Processes

The process for OER course development and approval should be transparent to all campus stakeholders. The process typically includes:

- » **Terms of agreement:** Requirements for OER courses should be clearly outlined in advance of course development and specify:
 - The type of OER permitted (adopt or adapt existing course materials; create new material);
 - The acceptability and definition of low-cost materials and fees, or whether courses must be zero-cost;
 - The terms of any financial incentive for OER course conversions (stipend or course release time), including whether differentiated stipends will be paid (e.g., for high-cost courses; high-enrollment courses; team-based development; full courses vs. single sections), and the timeframe for the financial incentive (e.g., pre- or post-development; summer stipend); and
 - The expected time commitment for offering the course as OER, including whether financial considerations stipulate the course remain OER for a certain period of time.
- » **Proposal process:** The process for proposal submissions and approvals should be transparent to faculty. OER course conversions typically begin with an OER proposal or agreement document. For example, a basic OER course conversion proposal or agreement form includes the course and faculty contact information; a more comprehensive form might include information about current textbook costs and the number of students enrolled in the course so cost savings can be estimated.

Some colleges require faculty to attend a workshop or OER training before they can submit a proposal so they understand the basics of OER, the resources available, licensing requirements, and their institution's course conversion guidelines. An OER proposal form might also allow faculty to request professional development support as part of the proposal process.

- » **Approval process:** Proposal agreements are generally reviewed and approved by an OER committee, with additional approvals sometimes required by an academic Dean or Provost. After a course is complete, faculty typically provide the OER review team with either a course syllabus or course map containing links to the OER course materials; a team member then conducts a license check and confirms that the course meets the terms of agreement.

In addition to these upfront processes for course conversions, campuses should also consider any post-course processes that may be beneficial. For example, do OER courses need to undergo a separate course review apart from the traditional review processes? What is the process for sharing courses with colleagues inside and outside of the college? When custom OER is developed for shared courses, who is responsible for updating course materials and links so it remains current, and at what time intervals?



Process Resources and Examples:

- SUNY Fredonia – OER Course Design Process
- SUNY Hudson Valley CC – OER Course Proposal
- SUNY Canton – OER Proposal MOU
- SUNY Hudson Valley CC – OER Course Approval Rubric
- CUNY – OER Course Designation Guidelines

3. Professional Development

Cultivating OER supports and making them easily accessible are key to faculty recruitment, engagement, and successful OER course conversion. Common barriers to OER adoption could be reduced by educating faculty about available OER resources and expanding the OER community on campus.

Library. Faculty may be reluctant to transition to OER because they are unfamiliar with available resources in their academic area, are unsure where to search for materials, or have concerns about quality. Connecting faculty with colleagues and librarians familiar with OER can address many of these concerns. Library directors may want to consider assigning library liaisons to specific departments, host regular OER office hours or OER workshops similar to SUNY Fredonia’s Library, or supporting an “OER librarian” by reallocating a few hours of existing staff time to OER activities each week. Library support could improve efficiencies around course development by providing faculty with leads on course materials and assisting with copyright licensing.

Technology. Most colleges have instructional designers and/or information technology staff that can assist with OER course delivery. For example, they have the expertise to load course materials into the college’s learning management system and could also help faculty evaluate the technical differences between different OER courseware options (e.g., online course delivery software or homework software package).

Faculty collaboration. Faculty highly value peer-to-peer learning and collaboration around OER course development, but are often unaware of other faculty on campus using OER. Some colleges have convened OER committees or task forces and strategically selected faculty to provide broad representation across campus. At UAlbany, funded OER Fellows provide outreach across campus, educating their colleagues about OER at various meetings and events, and serve as initial points of contact for questions on OER. Other colleges have advertised their OER courses, course materials, and faculty contact information prominently on their websites to improve the visibility of OER courses and make it easier for faculty to connect with their OER-experienced colleagues. An OER professional development fund at SUNY Canton provides an opportunity for faculty and staff to attend off-site OER events, and encourages a share-back with colleagues at the College.

4. Platforms

Implementation of appropriate technology platforms and processes can help institutions scale, measure, and support OER across campus.

Learning management systems (LMS). LMS technologies, like Blackboard and Canvas, are already deployed on most campuses. OER course materials can be loaded directly into the LMS even when they reside on external online repositories (e.g., Lumen Learning). Technology staff can develop processes to import OER course materials into course shells so students have direct access in the LMS. Colleges and universities that prioritize loading OER materials into the LMS for all their courses will benefit from additional analytics that can be drawn from the LMS on the utilization of



Professional Development Resources and Examples:

- SUNY Fredonia – OER Discovery Labs and Library Appointments
- SUNY Canton – OER PD Funding Program
- SUNY Hudson Valley CC – Peer-to-Peer OER Contacts
- MN State – OER Learning Circles

OER resources. Technical staff also may be positioned to assist faculty in understanding and evaluating software that permits them to customize existing OER (e.g., edit open textbooks).

Legacy systems. Colleges and universities may need to develop mechanisms to identify and report the number of OER courses they offer. Adding course identification codes to colleges' enterprise resource planning (ERP) systems (e.g., Banner) allows data administrators to add OER course identification tags to their back-office systems. Departments will also need to develop processes to identify and report which courses have an eligible OER designation (as distinct from other "no cost" or "low cost" courses that may not utilize openly licensed materials). These processes tend to operate manually at the department level, but automating these reporting processes can reduce administrative time and improve accuracy. Similarly, colleges should add OER identification tags to their course catalog and class schedule so students can identify and actively search for OER courses.

Auxiliary systems and services. Campus OER leaders may benefit from including the campus bookstore and/or print shop in their OER sustainability planning. These campus units are often well-positioned to provide OER-related services to students and faculty and may have already adapted their platforms and processes to accommodate new types of course materials, including OER. Many bookstores already have processes in place for faculty to report an OER course section during the textbook adoption process, with this information displayed in the colleges' online bookstore.

Bookstores may also consider establishing a relationship with their campus print shop or other print vendor to make optional print versions of OER textbooks available for students to purchase. Bookstores may choose to stock a few copies on the shelf and monitor inventory, or offer a print-on-demand service. Colleges should ask their auxiliary services providers how they can support OER and student learning in new ways. For example, at Hudson Valley Community College the bookstore worked with the print shop to determine the most cost-effective method for printing OER textbooks. The bookstore also developed guidelines to help faculty determine the number of print OER textbooks they should ask the bookstore to stock on their shelves.

Options are also now available for students to pay technical support fees associated with some OER courses directly through campus bookstore or LMS systems. Campuses that rely on digital courseware and face difficulty adding new OER course fees to support these new delivery methods may want to consider these emerging payment and delivery platforms.

5. People and Organizational Framework

The greatest investment colleges and universities make in OER is around faculty and staff time. Typically, this reflects the reallocation of existing staff time to OER and away from other activities. Sustainability will require that campuses have these essential human resources in place to develop, manage, and grow their OER programs.

Campuses can plan for anticipated OER-related personnel resources by considering: 1) the organizational framework envisioned for OER activities; and 2) the faculty/staff necessary to grow and support the work. It is important to recognize that personnel requirements for a mature OER model may differ from requirements during the growth phase.



Platform Resources and Examples:

- SUNY Monroe CC – OER Course Search Filter
- Santa Ana College – OER Class Schedule
- SUNY Hudson Valley CC – Bookstore and Print Shop OER Textbook Guide
- Lumen Learning – OER Course Fee Payment System

» What will the OER organizational structure look like?

There are various organizational structures that campuses may consider, including:

- An OER Coordinator position that oversees and manages the work;
- Leadership from a support unit, such as the library;
- Embedding oversight into an existing academic center, such as a center for teaching and learning or distance learning/online education office;
- Embedding the work into departments with a designated faculty member or OER committee/task force leading the work; or
- A hybrid approach that incorporates more than one of the above approaches (or changes over time as the program matures).

Once the institution's preferred organizational approach is selected, the necessary faculty and staff can be identified to lead and manage the work.

» What faculty and staff roles will be needed to grow and sustain OER on campus?

Beyond the OER organizational framework, college and universities will also need to identify the support roles necessary to grow and sustain OER. Although much of this support is expected to come from existing faculty and staff, their time comes with real costs—existing work may need to be shifted to others (e.g., hiring an adjunct to compensate for course release time) or the work may no longer be performed (e.g., library reference desk hours are reduced to support OER activities).

Support staff. Plans to develop and implement the other infrastructure components (policies, processes, professional development and platforms) can help identify the staff roles required to support OER. This will likely include staff from: department administration, information technology, instructional development, library services, and institutional research (reporting). In some areas, anticipated growth of OER courses may prompt additional hiring rather than relying only on reallocation of staff time. For example, if existing capacity for instructional designers or library support is unable to meet OER-related demand, additional staff positions may be needed.

Faculty. The organization structure to sustain OER will define the additional roles that faculty may assume, such as serving as formal OER mentors, fellows or committee/task force members. For faculty developing OER courses, there can be considerable variation around time requirements depending on whether they are adopting, adapting, or creating new OER materials; time may also be needed to create supplemental materials such as homework assignments and assessments.



Human Resources and Examples:

- SUNY Albany – OER Fellows
- Pierce College – OER Project Manager Job Description
- CUNY – Library Led OER Initiative
- Affordable Learning Georgia – OER Champions & Coordinators
- SUNY Hudson Valley CC – Online Media Manager (OER) Job Description

Resources

Identifying financial resources to fund OER activities is often a top concern of OER advocates and represents the second component of the OER Sustainability Framework. There are various support models that could be adopted depending on the college's vision for its OER program. The required resources include not only dollars, but reallocated staff time. In addition, colleges should consider how they could organize and deliver OER more efficiently to reduce resource requirements.

1. Finances

The financial resources required to sustain OER over the long-term will vary, depending on the organizational structure, infrastructure supports, number of course conversions and the course development incentives offered. Before determining the best source of revenue for sustaining OER, colleges and universities should understand the costs associated with these activities, as well as any ancillary course delivery fees that may be assessed.

Colleges should recognize that OER start-up costs may be higher than long-term operating costs. For example, faculty stipends initially paid to convert courses to OER may eventually be phased out. Also, time requirements may diminish as OER expertise grows and policies and procedures are put firmly in place.

Financial sustainability planning includes:

- » **Estimating program costs.** Anticipated annual program costs should include the personnel expenses (existing faculty/staff and new hires) associated with the program's organizational framework and the operational and professional development supports previously identified. Any non-personnel operating costs, such as technology, marketing, or communications should also be captured.
- » **Estimating course-related costs.** Course-related costs include faculty time, financial incentives for course development (such as stipends or course releases), post-development reviews and revisions, and vendor fees for OER courseware. These variable costs depend on the number of courses or students enrolled.
- » **Exploring potential funding sources.**
 - **Potential tuition revenue recapture (Return on Investment).** OER has the potential to generate additional tuition dollar revenue for institutions by improving student retention. Precisely determining the tuition revenue recaptured because of OER may be difficult to quantify and transform into annual budget requests. But evidence that OER has positive financial and non-financial impacts for the institution may provide leverage for securing institutional investments in OER.
 - **Institutional budget support.** Campuses that expect to embed OER into existing departments or academic centers would include funding for OER activities in their regular budget process. Budget requests



Financial Resources and Examples:

- SUNY Tompkins Cortland CC – OER Course Fee (Description)
- Ivy Tech CC – Open Material Selection Fee
- OregonOpen – How to Pay for OER
- Salt Lake CC – OER Fee Guidelines and Budget Tool
- SRI Education and rpk GROUP – ATD OER Degree Initiative Year 2 Report (Financial Impacts)
- Wiley, et al. – Return on Investment from OER

should include adequate funding for faculty and staff to take on new OER-related work, or include expansion funds when capacity is limited.

- **Fee structures.** There are several ways that OER fees can be implemented and structured. However, new student fees may be politically untenable at some institutions or require onerous approval processes.
 - **Vendor pass-through fee.** These fees are assessed only for courses that use courseware from third-party vendors, and are typically between \$5-\$25 per student. The institution may collect the fees and pass them through to the vendor, or students can pay the fees directly when direct-payment platforms are available. The vendor charges these fees for technical access and support; the

institution does not receive any supplemental revenue from these fees.

- **OER course fee.** These fees are assessed for any OER-designated course and typically range from \$10-\$20 per OER course. The revenue may be used in a variety of ways (depending on acceptable institutional uses), including paying for vendor pass-through fees, supporting professional development, and development/maintenance of OER courses. In the model employed by Kansas State University, 10% of the fee is used to support its OER initiative while departments receive the remaining 90%. Departments have broad latitude in spending the funds, which provides an incentive to convert courses to OER.

Bookstore revenue impacts. OER may have modest financial impacts on the income that campuses receive from their bookstores. Institutions concerned about these impacts can work with their bookstore and auxiliary services department to estimate the potential loss in textbook sales, and the related loss in sales commission from vendors (using the commission rate schedule in the vendor contract) or the profits that independent stores may share with the college or university. The revenue impact for colleges is typically smaller than expected (and significantly lower than overall student savings) because the bookstore commission reflects only a percentage of lost textbook sales, and some students purchase textbooks from non-campus stores (or not at all).

2. Efficiency

Colleges and universities can consider different ways to generate efficiencies within their OER programs to drive down costs. There are multiple ways that colleges could choose to reduce development costs:

- » **Create one master OER section per course.** Developing one master OER course avoids creation of multiple OER sections of the same course, reducing stipends for similar work and the expense associated with reviewing and maintaining multiple course sections.
- » **Limit editing privileges.** Once an OER section is developed, limiting editing privileges reduces time spent revising and reapproving new versions of a course.
- » **One OER section = All OER sections.** Departments that require adoption of the same textbook for all course sections may consider a similar policy for all OER courses sections; standardization avoids duplication of effort and streamlines course management.
- » **Provide differentiated financial incentives.** Larger stipends for converting high-enrollment courses reduces the development cost per student enrolled and boosts potential student savings; incentivizing conversion of courses with high textbook costs increases student savings.
- » **Encourage team-based development.** Team-based development offers several potential benefits, including: faster time to course completion; increased confidence in course quality; a collegial development experience; and possible adoption by multiple faculty members. These factors can reduce the development cost per section and per student. However, the greatest savings occur when faculty effectively delegate work tasks and reduce duplication of effort. Stipends that are offered per course, and then shared among contributing faculty members, also curbs per course development expenses.

Academic efficiencies (Return on Investment). OER may generate efficiencies for departments if it improves academic outcomes for students. When fewer students withdraw or receive grades of D or F (DFW rates) because of first-day access to OER materials and/or changes in pedagogy associated with OER materials, fewer students will need to retake the course. This reduction in course repeats may reduce the number of sections a department needs to offer, which can have real budgetary savings if fewer adjuncts are needed to teach the course.



Efficiency Resources and Examples:

- SUNY Fredonia – Differentiated OER Incentives
- Tidewater CC – OER Policy (Section 4.7)
- SRI and rpk GROUP – ATD OER Degree Initiative Year 2 Report (Course Development Costs)
- Colvard et al. – The Impact of OER on Various Student Success Metrics (GA)

Culture

The third critical component of sustainability is developing an OER culture on campus. OER advocates can help cultivate high-level support for OER by demonstrating how it connects to their institution's strategic plan and helps accomplish institutional objectives. Measuring OER's contribution to those objectives requires that colleges and universities develop and monitor meaningful metrics around OER. These metrics can then be used to share OER's successes and impacts with the college community.

1. Vision and Strategy

Access, affordability, student success and academic transformation are top priorities for many college and university leaders. These themes are often observed in institutions' strategic visions, objectives, and plans. Demonstrating ways in which OER can help institutions meet their objectives across these areas can garner institutional support for OER.

Potential connections that institutions may draw between OER and common strategic objectives are shown below.

» Access

- Eliminating or reducing course material expenses lowers cost-related barriers to enrollment.
- Converting first-year courses to OER offers a fresh recruitment strategy for new students.
- Open materials are accessible to students on the first day of class, and students receiving financial aid will no longer have to wait for funds to purchase textbooks.

» Affordability

- No-cost or low-cost course materials reduce students' cost of attendance.
- Students indicate the quality of OER resources are comparable to commercial materials, but at lower cost (Griffiths et al., 2018).
- OER has the potential to reduce costs associated with unproductive credit hours, repeated courses, and time to degree if the courses lead to improved student outcomes.

» Student success

- Learning outcomes are comparable for students in OER and traditional courses, but with the added benefit of eliminating or reducing course material costs (Hilton III, 2016).
- Using OER in transformative ways that change pedagogical practices (e.g., courseware) has the potential to improve student learning outcomes.

» Academic transformation

- Use of openly licensed materials gives faculty the flexibility to customize instructional materials for their course.
- Digital OER course materials offer a low-cost alternative to costly publisher access codes, often bundled together with traditional textbooks.



Vision Resources and Examples:

- UWisconsin-Madison – OER Strategic Framework
- CUNY – Library Strategic Priorities
- Penn State – OER Task Force Report (Ch. 1 & 2)
- Open Education Group (Hilton) – Research on OER Perceptions and Efficacy

OER leaders can highlight the types of connections illustrated above to the institution's strategic objectives when communicating with campus leaders and colleagues. Periodic revisions to the institution's strategic direction also provide an opportunity to position OER as a pathway to meet the institution's strategic goals.

Finally, the connection between OER and the college or university vision can also be incorporated into campuses' OER Guidelines, as part of the purpose statement.

2. Metrics

Metrics play an important role in monitoring OER's growth and impact on campus. Metrics may be used for basic reporting and monitoring purposes; they also can provide additional context useful in storytelling that highlights OER's impacts on students and the campuses. Selecting the appropriate metrics depends on the information required and the purpose it will serve:

- » What do institution and system leaders want to know about OER?
- » What information will encourage faculty and students to transition to openly licensed materials?
- » What can OER advocates share that will help build ongoing support from institution, system, and state leaders?

SUNY institutions receiving OER funding from the System Office are required to report basic implementation metrics as a condition of participation. Related to this requirement, campuses first need to ensure the platform and procedures are in place to identify and report basic OER course and enrollment information. It's important that colleges develop good data and reporting procedures because it provides critical insight on the impact that OER is having across the SUNY System.

Since student savings are often the primary motivation for developing OER courses, the savings from eliminating or reducing commercial textbook purchases is another key metric. Institutions already collecting information on textbook costs as part of their OER proposal process can merge it with information on course enrollments to estimate aggregate savings. Otherwise, textbook prices can be requested from the bookstore or collected from the bookstore website.

Traditional measures of textbook savings assume all students would have purchased a new textbook and therefore reflect "maximum" student savings. More realistic estimates adjust for student purchasing patterns, including utilization of used or rental texts, or forgoing textbook purchases altogether, as well as shopping at lower-cost online retailers. These adjusted estimates should also capture any additional costs students may incur from OER course fees or the optional purchase of printed OER textbooks.

Student success-related metrics can be used to show OER's impact beyond just student savings. For example, comparisons of student performance in OER and non-OER sections can help departments diagnose any imbalances across OER and non-OER course sections. Differences in DFW rates can also be analyzed to determine if OER courses are generating any departmental efficiencies by reducing the number of students that need to repeat courses. However, the basic calculations comparing student outcomes should not be used to make causal inference about the efficacy of OER without accounting for other factors, such as student characteristics and preparation.

Institutions may also choose to administer surveys to collect additional contextual information about students' and faculty members' perceptions and experiences with OER.



Metric Resources and Examples:

- SRI – Student Survey; Instructor Survey
- Lumen Learning – OER Impacts Calculator
- University of GA, et al. – Impact of OER on Various Student Success Metrics
- Open Education Group – OER Research Toolkit

OER Metrics: Basic and Advanced Calculations

Metric	Basic Calculation	Advanced Calculation
Implementation	<ol style="list-style-type: none"> 1. Number of OER courses and sections, and percent of total courses and sections 2. Number of OER enrollments (duplicated) and percent of total enrollments 	Basic metrics calculated for: <ul style="list-style-type: none"> • Department (or college) • First-year courses • High-enrollment courses (define) • Student characteristics (e.g., Pell students)
Student Savings	<ol style="list-style-type: none"> 1. Maximum student savings (OER enrollments * new textbook cost) 	Adjust to reflect textbook purchasing patterns and additional costs: <ul style="list-style-type: none"> • Use blended textbook price (total new, used and rental sales ÷ total units sold) • Exclude the proportion of students that do not purchase textbooks (estimate using information from own or other student surveys) • Adjust for proportion of students purchasing lower-cost used textbooks online (own or other student surveys; literature on used textbook prices) • Add offset for any OER course fees charged • Add offset for printed copies of OER materials purchased
Student Success	<ol style="list-style-type: none"> 1. Number of DFWs and DFW rates in OER/non-OER sections 2. Average grade in OER/non-OER sections <p><i>Use for diagnostic purposes only; differences may be attributed to student/faculty/course characteristics.</i></p>	Adjust for student/faculty/course characteristics (e.g., grade point average; socio-economic indicators; type of OER)
Perceptions	<ol style="list-style-type: none"> 1. Student survey (e.g., OER awareness, quality, textbook use, financial savings, etc.) 2. Faculty survey (e.g., availability and quality of resources; development time; professional development and support, etc.) 	Additional OER-related topics of interest

3. Communication

Establishing an OER communication plan is a critical part of sustainability planning for colleges and universities. Communication plans should reflect the needs of diverse audiences including students, faculty and staff, and academic leaders.

Faculty. At most colleges, early OER communication activities are organized around faculty recruitment. But those same OER workshops and various meeting presentations initially used to educate colleagues also provide opportunities to share OER's successes and challenges. Similarly, OER taskforce or committee members and instructors can organically share OER's growth with colleagues and identify barriers to sustainability. More formal methods of communication including blogs or short updates in newsletters or department bulletins offer easy options to maintain visibility. But to sustain OER, messaging will need to extend beyond faculty to include students, as well as college and university leaders.

Students. Students can be effective ambassadors for OER, but many aren't exposed to these opportunities unless they inadvertently enroll in an OER section. Oftentimes students learn they're in an OER course on the first day of class. Adding an OER course identification flag to course catalogues and class schedules is helpful for students knowledgeable about OER, but it's an indirect enrollment strategy that may not be the most effective method for informing students about lower-cost course options.

Students need candid information about no-cost or low-cost educational opportunities. Student advisors should receive information about OER so they can educate students about those course options. Student campaigns can also directly educate students about OER courses. Some colleges host student campaigns during the annual OpenEd week organized by the Open Education Consortium. Activities may include campus posters, student and faculty panels, social media blasts, t-shirt campaigns, and booths informing students about textbook alternatives. Student organizations engaged around OER also are effective advocates on campus and/or at the state and system levels.

College and University Leaders. Educating college and university leaders about OER and its impacts on student affordability and learning can secure the foundation for a sustainable OER program. Metrics and student impacts that are combined to craft compelling evidence can provide leaders with the information needed to provide ongoing support for nascent OER efforts. OER also provides leaders with an opportunity to show students who are raising concerns about textbook prices that they are actively addressing those concerns.



Communication Resources and Examples:

- SUNY Albany – OER Fellows Update
- Montgomery College – OER Information Sheet
- Inside Higher Ed – Calculating (and Acknowledging) the Costs of OER
- CCCOER – CC OER Campaigns
- Open Education Week – OER Campaigns

Conclusion

The OER sustainability framework presented in this Field Guide is designed to assist colleges and universities as they look to scale their current OER “initiatives” and increasingly weave OER opportunities into their academic offerings. The framework describes the infrastructure, resources, and culture that aid in the development of sustainable OER practices. The Field Guide outlines the scaffolding to support and scale OER programs on campuses rather than the mechanics of developing courses that utilize openly licensed materials.

The framework includes 10 components and related activities that campuses can use to develop a custom sustainability plan. The framework offers an organizational structure while also affording campuses the flexibility to design an approach that accommodates their current circumstances, priorities and objectives. Campuses’ OER sustainability plans may continue to evolve over time as components are completed, priorities shift, or revisions are required. Ultimately, the integration of OER may look quite different across the SUNY campuses depending on the various approaches adopted, but with the necessary supports in place, these diverse approaches can become sustainable.

References

- Affordable Learning Georgia. (n.d.). Champions & coordinators. Retrieved from https://www.affordablelearninggeorgia.org/about/champions_coordinators
- Colvard, N.B., Watson, C.E., & Park, H. (2018). The impact of open educational resources on various student success metrics. *International Journal of Teaching and Learning in Higher Education*, 30(2), 262-276. Retrieved from <http://www.isetl.org/ijtlhe/pdf/IJTLHE3386.pdf>
- Coolidge, A., & DeMarte, D. (2016). College and university open educational resources (OER) policy development tool. Retrieved from <https://policy.lumenlearning.com/>
- CUNY Libraries. (n.d.). Guidelines for zero textbook cost course designation. Retrieved from <http://www2.cuny.edu/libraries/open-educational-resources/guidelines-for-zero-textbook-cost-course-designation/>
- CUNY Libraries. (n.d.). Strategic priorities 2017-2020. Retrieved from <http://www2.cuny.edu/libraries/strategic/>
- Daly, U. (2017, April 17). Community colleges celebrate open ed week. [Blog post]. Retrieved from <https://www.cccoer.org/2017/04/17/community-colleges-celebrate-open-education-week-2017/>
- Dewey, B., & Salem, Jr., J. (2016). *Open Educational Resources (OER) Task Force Report*. University Park, PA: Penn State University. Retrieved from <https://sites.psu.edu/oers/files/2016/12/OER-Task-Force-Report-1kgb13y.pdf>
- Fiddler, A., Amaral, J., Ford, M., & Williams, N. (2018, October 3). Libraries lead transformative OER degree initiative. [Blog post]. Retrieved from <https://www.cccoer.org/casestudy/libraries-lead-transformative-oer-degree-initiative/>
- Griffiths, R., Gardner, S., Lundh, P., Shear, L., Ball, A., Mislevy, J., Wang, S., Desrochers, D., & Staisloff, R. (2018). *Participant Experiences and Financial Impacts: Findings from Year 2 of Achieving the Dream's OER Degree Initiative*. Menlo Park, CA: SRI International. Retrieved from https://www.sri.com/sites/default/files/publications/participant_experiences_and_financial_impacts_oer_2018.pdf
- Hilton III, J. (2016). Open educational resources and college textbook choices: A review of research on efficacy and perceptions. *Educational Technology Research and Development*, 64(4), 573-590. Retrieved from https://link.springer.com/article/10.1007/s11423-016-9434-9?wt_mc=internal.event.1.SEM.ArticleAuthorOnlineFirst
- Ivy Tech Community College & Lumen Learning. (n.d.). OER at Ivy Tech. Retrieved from <https://www.ivytech.edu/files/OERatIvyTech%20Handout-ClaireMaxson.pdf>
- Lederman, D. (2018, July 25). Calculating (and acknowledging) the costs of OER. *Inside Higher Ed*. Retrieved from <https://www.insidehighered.com/digital-learning/article/2018/07/25/community-college-confronts-costs-open-educational-resources>
- Lumen Learning. (2018). Lumen+Follett payment options. Retrieved from https://lumenlearning.com/wp-content/uploads/2018/02/Lumen_Follett-PayOption-Comparison-Feb-2018.pdf
- Marvin Library, Hudson Valley Community College. (n.d.). Featured OER champions at HVCC. Retrieved from <https://libguides.hvcc.edu/friendly.php?s=oer/textbooks>
- Marvin Library, Hudson Valley Community College. (n.d.). Working with the bookstore & print shop. Retrieved from <https://libguides.hvcc.edu/friendly.php?s=oer/bookstore>
- Monroe Community College. (n.d.). Class schedule search. Retrieved from <https://www.monroecc.edu/classes/>
- Montgomery College. (n.d.). Open educational resources (OER) information sheet. Retrieved from https://www.montgomerycollege.edu/_documents/offices/elite/oerandmccopeninformationsheet.pdf

- Open Education Consortium. (2019). Open education week 2019. Retrieved from <https://www.openeducationweek.org/>
- Open Education Group. (n.d.). OER research toolkit. Retrieved from <https://openedgroup.org/toolkit>
- OpenOregon Educational Resources. (2017, December 20). How to pay for open. [Blog post]. Retrieved from <https://openoregon.org/how-to-pay-for-open/>
- Pikula, K., & Preimesberger, P. (2017). *Using a D2L course room and collaborative learning circles to support faculty in OER review, adoption, course redesign, and authoring*. [PowerPoint slides]. Retrieved from <https://pubs.lib.umn.edu/index.php/mslt/article/view/868>
- Reed Library, SUNY Fredonia. (n.d.). Open educational resources (OER) & Reed Library: Course redesign incentive. Retrieved from <https://fredonia.libguides.com/oer/incentive>
- Reed Library, SUNY Fredonia. (n.d.). Open educational resources (OER) & Reed Library: On-campus support. Retrieved from <https://fredonia.libguides.com/oer/support>
- Salt Lake Community College. (n.d.). Curriculum course fees, guidelines, and budget sample. Retrieved from <https://faculty.slcc.edu/curriculum/course-fees.aspx>
- Santa Ana College. (2018). Open education resources & zero textbook cost classes (Fall 2018). Retrieved from <https://sac.edu/catalogAndSchedule/Documents/2018-2019/2018FA/2018FA-OER.pdf>
- South African Institute for Distance Education - OER Africa. (2011). *OER Policy Review and Development Toolkit: A Guide for Higher Education Institutions Interested in Creating and Using Open Educational Resources*. Johannesburg: Saide. Retrieved from https://www.oerafrica.org/system/files/9321/policy-toolkitwebrevised29march2012highres_0.pdf?file=1&type=node&id=9321&force=
- SRI International. (2016). OER Degree Initiative survey. Retrieved from https://www.sri.com/sites/default/files/brochures/ccord_survey_instrument.pdf
- SUNY Canton. (n.d.). NYS SUNY OER funding initiative: Course redesign incentive. Retrieved from http://researchguides.canton.edu/ld.php?content_id=44971296
- SUNY Canton. (n.d.). OER professional development funding. Retrieved from http://researchguides.canton.edu/ld.php?content_id=44971444
- The University of Edinburgh. (2016). Open education resources policy. Retrieved from <https://www.ed.ac.uk/files/atoms/files/openeducationalresourcespolicy.pdf>
- Tidewater Community College. (2016). Policies and procedures: Use of open educational resources. Retrieved from <https://www.tcc.edu/uploads/pdf/policies/tcc-policy-2108.pdf>
- Tompkins Cortland Community College. (n.d.). Fee descriptions. Retrieved from <https://www.tompkinscortland.edu/admissions/fee-descriptions>
- University of Wisconsin-Madison. (2016). Open educational resources (OER) strategic framework. Retrieved from <https://edinnovation.wisc.edu/wp-content/uploads/2015/02/OER-Strategic-Framework-at-UW-Madison.pdf>
- Wiley, D. (2019). The OER adoption impact calculator, version 1.2. Retrieved from <https://impact.lumenlearning.com/>
- Wiley, D., Williams, L., DeMarte, D., & Hilton III, J. (2016). The Tidewater Z-degree and the INTRO Model for sustaining OER adoption. *Education Policy Analysis Archives*, 21(41), 1-12. Retrieved from <https://epaa.asu.edu/ojs/article/view/1828>



rpk GROUP

rpk GROUP is a leading consulting and advisory firm in education, supporting institutions and organizations with their growth strategies by focusing on Mission, Market and MarginSM opportunities.

We partner with clients throughout the U.S. and globally, including higher education, k-12, public and private sector institutions and systems, educational policy and governance organizations, and foundations. Our teams of experts have helped to launch new organizations, as well as revitalize traditional education institutions. Through this work, rpk GROUP has become a leading voice in the development of new, sustainable business models in education.

Connect with us

rpkgroup.com • info@rpkgroup.com • 626C Admiral Drive, Suite 511, Annapolis, MD 21401
