

Sustaining OER Across the SUNY System: Lesson Learned from a Second Cohort of OER Campuses

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Key Findings

- **Open educational resource (OER)¹ initiatives are projected to generate a positive return on investment to students *and* campuses** participating in the second OER sustainability cohort.
- **Ongoing costs for OER programs are expected to average about \$100k annually**, which largely reflects the value of staff time spent developing OER courses and supporting OER programs and activities.
- **Campuses in the second cohort will need to aggressively scale the OER enrollment goals and efforts** for their OER programs to be cost-efficient.
- **OER data collection and reporting systems are underdeveloped** at many of the cohort campuses and would benefit from ongoing support from peers and/or the SUNY System to strengthen these processes.
- **Most of the campus teams successfully established some early sustainable practices**, such as gaining approval for OER task forces and committees, securing OER funding, pursuing improved data collection and reporting practices, and planning to infuse OER into other campus initiatives.
- **Cohort campuses are cautiously optimistic** that they have the necessary elements in place or in process to sustain their OER programs.

Background

Since 2018, [rpk GROUP](#) (rpk) has worked with [SUNY OER Services](#) and campuses across the SUNY System to design and implement sustainable business and operating models that support the adoption and growth of open educational resources (OER). This partnership began after the launch of SUNY's new state-supported investment in OER to reduce the burdensome cost of textbooks for students.

New York State provided the SUNY System with \$4m in funding in 2017 to expand usage of OER on its campuses.² This initial investment, as well as continued annual funding, has supported the creation and adoption of no-cost or low-cost course materials to improve student course material affordability and help faculty customize materials to align with their course objectives.

More than 50 SUNY campuses elected to participate in the state-funded OER initiative. Campuses were required to: 1) maintain their redesigned OER courses for three years; 2) develop an OER sustainability plan; and 3) provide the SUNY System with information on OER enrollments, student savings, and an accounting of financial resources received.

SUNY System Administration engaged rpk to develop a replicable framework and approach for OER sustainability, and then partner with SUNY campuses to create their own OER sustainability plans. During fall 2018, rpk created a new OER sustainability framework built around three key components—Infrastructure, Resources and Culture—and developed supporting resources including an [OER Field Guide](#), [four OER case studies](#), an [OER Sustainability Self-Assessment](#) and [Planning Guide and Template](#).

¹ Open educational resources (OER) are free and openly licensed course materials that can be utilized and re-purposed by others.

² The City University of New York (CUNY) system received a similar state investment.

Motivated to provide additional campus supports, SUNY System and rpk GROUP co-designed a series of workshops to ensure engagement with the new sustainability framework and resources, and also assist campuses in formulating their OER sustainability plans. An inaugural cohort of 16 campuses participated in a series of nine workshops and two technical assistance sessions with each campus-team over a 15-month period beginning in fall 2019.³ A second cohort of 10 campuses launched in fall 2020 and concluded in winter 2022.⁴

Prior reports and a published [case study](#) highlight findings from the first cohort of workshop participants.⁵ This report focuses on the implementation and findings for the second cohort of participating campuses.

OER Workshops: Cohort Two (2020-22)

The workshops for cohort two were designed around the same core objectives as the workshops for cohort one:

1. **Guide a cohort** of SUNY campus in expanding and implementing their current OER sustainability plans through resources and tools aligned with the OER Sustainability Framework, and
2. **Expose the cohort** to ways in which the OER sustainability concepts can be expanded to other types of student success initiatives.

The workshops delivered in the first year of the experience aligned with the 10 elements shown in Figure 1: OER Sustainability Framework. All workshops were delivered virtually, and typically included a 90-minute session in the morning and in the afternoon (see Appendix A). The content and delivery of the workshops for the second cohort of campuses were customized to reflect the following observations and enhancements:

- **OER programs in the second cohort were less mature than those in the first cohort.** The campuses invited to participate in the inaugural cohort had robust OER programs, which was a primary consideration in their selection. All the campuses invited to participate in the second cohort also had OER programs in place, but most were not as well established as the first cohort.
- **Data collection processes were less well-developed at the campuses in cohort two.** Conversations with campuses during individual technical assistance calls revealed that most did not have procedures in place to regularly and accurately collect and report OER course section and student enrollment data.
- **Most campuses did not anticipate aggressively scaling OER enrollments.** Reviews of the campus financial models revealed that OER enrollment growth projections were very modest, which prompted additional discussion about the importance of scale in overall sustainability efforts.

Figure 1: OER Sustainability Framework



³ Cohort one - Four-year Colleges: Buffalo State, SUNY Oneonta, SUNY Plattsburg; Technology Colleges: SUNY Canton, SUNY Delhi, Farmingdale State College; Community Colleges: SUNY Erie, Columbia-Greene, Corning, Dutchess, Finger Lakes, Mohawk Valley, Monroe, Nassau, Rockland, Suffolk.

⁴ Cohort two - Four-year Colleges: SUNY College at Brockport, SUNY New Paltz, SUNY Purchase; Technology Colleges: SUNY Maritime, SUNY Morrisville; Community Colleges: Broome, Onondaga, Sullivan County, Tompkins Cortland, Ulster.

⁵ In addition to the case study describing lessons learned at the conclusion of cohort one's workshops, a white paper on "SUNY OER Sustainability Project: Implementation & Findings, Year 2" submitted to SUNY OER Services in August 2020 describes findings from the first year of cohort one's workshops.

- **Participants in the first cohort workshops were available to provide expert guidance on various aspects of the sustainability framework.** The workshops delivered to the first cohort included several guest speakers unaffiliated with SUNY, but participants in the second cohort were keenly interested in lessons that could be learned from their SUNY peers in the first cohort. So, several participants in the first cohort were invited back to discuss various sustainability framework topics in which they demonstrated expertise during their own workshop series.
- **rpk incorporated new best practices learned from other cohort engagements to further support OER sustainability efforts.** The workshops delivered to cohort two during their second year of participation included new topics and activities to 1) identify campus stakeholders, 2) analyze campus OER data, and 3) create an action plan for post-OER workshop activities. These extensions provided additional support around the financial model and pitch deck deliverables completed during the first year and provide additional structure for moving the work forward.
- **rpk introduced new tools and resources teams could continue to use after the workshops.** Campuses can continue to use the new action plan template provided at the end of the workshop to plan for additional post-workshop priorities. They were also encouraged to update their financial models and pitch decks and re-use those tools and templates after the conclusion of the workshops.

Campus cohort teams were asked to complete a series of deliverables throughout the workshops. These experiential learning activities reinforced elements of the sustainability framework and provided tools and resources the teams can use to reinforce their ongoing OER sustainability efforts. rpk engaged in two individual technical assistance (TA) calls with each campus team to provide guidance and feedback on the artifacts created; written feedback was provided on all artifacts. The campus team deliverables included:

1. **OER guidelines** describing OER use and policies on their campuses.
2. An **OER financial model** populated with campus-level data to better understand program costs, revenue sources, student savings, and potential return on investment to the institution from changes in student course taking.
3. A **pitch deck** to inform various stakeholders about campus efforts and goals, which included tailored requests to stakeholder audiences on specific action items to scale and sustain OER on their campuses.
4. An **OER infographic** to raise awareness of OER opportunities among students and faculty, and incorporate that messaging into OER communication plans (see Appendix B).
5. An **analysis of OER data** at an exemplar SUNY campus that reported data to SIRIS to demonstrate the value of collecting and reporting accurate and timely data.
6. An **action plan** that identified a primary objective to move their sustainability efforts forward and outline the key activities and steps to accomplish that objective.
7. Update of the initial **SUNY OER sustainability plan**.

Cohort Two Observations & Findings

Throughout rpk's engagement with cohort two, we were able observe the strengths and challenges facing the campus teams and gain insight into their programs during workshop discussions, campus TA calls, and review of their workshop deliverables.

Strengths & Challenges

- **Strong Engagement** – The second cohort of campuses was very engaged in the OER content and experiential learning activities. Since cohort two’s OER programs were less well developed than the first cohort, they were eager to learn and apply new concepts and ideas.
- **Bias Toward Action** – Many of the campus teams actively engaged with members of their campus community to address barriers to OER sustainability, including meeting with the registrar to improve data reporting workflows, advocating for OER teams/committees with faculty senate or president, engaging with the campus president to test the viability of different OER approaches, and soliciting funding for OER.
- **Weak Data Collection & Reporting Systems** – Many of the campuses struggled with ineffective data collection and reporting systems. Some had no process in place to collect data on the number of OER courses, sections, or student enrollments, while others relied on manual processes that were not aligned with information maintained by the campus registrar or reported to SIRIS.
- **Modest OER Enrollment Goals** – Most cohort campuses did not anticipate a rapid expansion of OER enrollment on their campus. Some teams felt that faculty interested in OER were already recruited when the initial OER state grant funding became available and recruiting additional faculty would be challenging.

Financial Sustainability & Scale

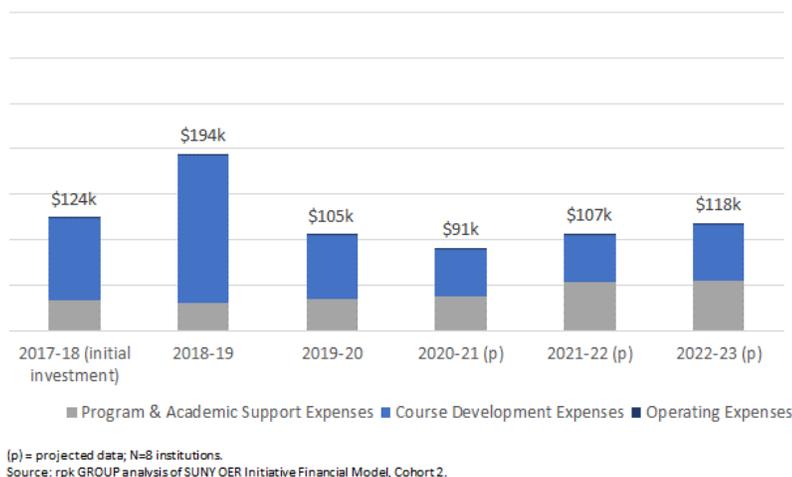
The strengths and challenges campuses are facing were amplified when they began populating the OER financial model. The financial model answers three key questions about each campus’s OER program: **1) How much does this cost? 2) Is this a cost-efficient approach? 3) Is this financially sustainable?**

How much does this cost? Findings from the financial models show that ongoing OER activity is expected to average around \$100k annually across the cohort (see Figure 2). Startup up activity during the first two years of the state-funded grant initiative averaged between \$125k and \$200k across the cohort. These costs included stipends and the compensation value of instructor time to create OER courses, program and academic support from librarians, instructional designers and program administrators, and other operating expenses (e.g., for marketing, printing, or professional development).

Most of the initial campus OER expenses were related to course development costs, which accounted for two-thirds to three-quarters of total expenses across the campuses. But as course development expenses decrease in later years, program and academic support expenses are expected to account for about half of the total cost.

The ongoing OER costs expected by the second cohort are comparable to projections by the first cohort of campuses. However, cohort one invested more heavily during the initial years (averaging \$200k to \$300k annually during the three years beginning in 2017-18), with most of that investment directed to OER course development. The first cohort’s expenses exceed those of the second cohort because they initially developed and then offered at least three times as many OER course sections.

Figure 2: OER Program Expenses
(SUNY Cohort Two Mean)



Is this a cost-efficient approach? Combining information on total expenses and annual enrollments in OER courses yields the ‘annual cost per OER enrollment’ (or ‘unit cost’). The median cost per OER enrollment is projected to total about \$100 per student within three years as expenses decline and enrollments increase (see Figure3).

OER enrollments across the cohort campuses are expected to more than double over the five years observed. However, this growth is not sufficient to significantly drive down unit costs. Furthermore, the median OER enrollment rate (OER course enrollments as a percentage of total course enrollments) is projected to rise only from 1% to 3% over five years, signaling significant capacity for additional growth. Scaling OER enrollments across the cohort campuses would make these programs more cost-efficient because it would reduce the cost per student served.

Notably, the median enrollment rate for the initial cohort one campuses was projected to reach 12% in five years because of more aggressive expectations around scaling OER, which reduced the average cost per student for the first OER cohort to \$25.

Is this financially sustainable? The cohort’s OER programs are projected to generate a positive return on investment for the campuses and their students. Student savings are the most visible benefit of OER programs. Within five years, OER are projected to yield nearly \$100k in student savings at the median cohort two campus, even after accounting for student purchasing patterns.

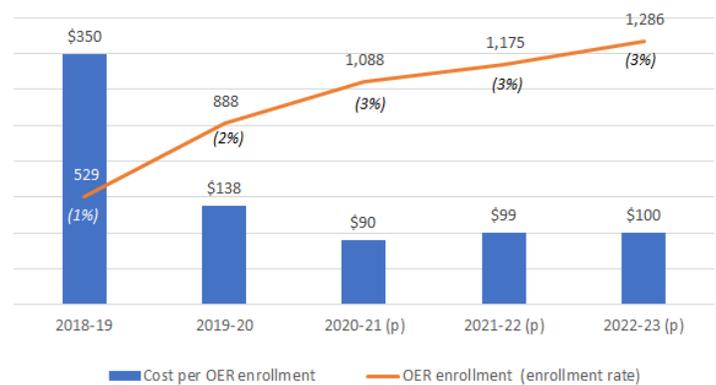
Campuses are projected to enjoy a positive financial return as well. Research suggests students taking OER courses enroll and pay for additional credit hours and drop fewer courses once enrolled.⁶ Modeling these impacts at the cohort campuses suggests that within three years these student impacts could generate about \$250k in net revenue (the median campus impact), after accounting for OER program expenses and the marginal costs of additional course taking.

Strategic Communications & Support

Cohort participants strengthened their communication approaches with faculty, leadership, and students through the development of their OER pitch decks and student infographics. Teams included specific actionable requests in their decks, and common ‘asks’ of their audiences included:

- Creation of an OER task force or committee
- Support to develop a new program or course (e.g., OER Degree or OER First-year Experience course)
- Adding an OER librarian position
- Adding an OER course designation to the class schedule
- Budget dollars and flexibility in appropriating the funds

Figure 3: OER Unit Costs and Enrollment (and Enrollment Rates)
(SUNY Cohort Two Median)



(p) = projected data; N=8 institutions. 'Enrollment rate' is the number of OER course enrollments as a percent of total course enrollments. Source: rpk GROUP analysis of SUNY OER Initiative Financial Model, Cohort 2.

⁶ Fischer, L., Hilton, J., Robinson, T.J. et al. (2015). A multi-institutional study of the impact of open textbook adoption on the learning outcomes of post-secondary students. *J Computing in Higher Education* 27, 159–172 <https://doi.org/10.1007/s12528-015-9101-x>
Wiley, D., Williams, L., DeMarte, D., & Hilton, J. (2016). The Tidewater Z-Degree and the INTRO model for sustaining OER adoption. *Education Policy Analysis Archives*, 23(41). <http://dx.doi.org/10.14507/epaa.v23.1828>

Several cohort teams presented their ‘pitches’ to campus stakeholders and received support or approval for their request. For example, SUNY Brockport received \$5k in funding for three years from their college foundation; SUNY Morrisville established an Alternative Learning Materials (ALM) task force and received widespread interest when soliciting task force members; and Tompkins Cortland Community College received approval from the faculty senate for an OER standing committee and the college’s new strategic plan includes OER.

OER teams focused most of their attention on recruiting faculty and garnering support from leadership. Students received less attention, so campuses were asked to design infographics to engage and educate students about OER. The infographics can be used in campus marketing efforts to motivate student enrollment in OER courses (see Appendix B).

Cohort Two Progress, Preparedness & Next Steps

At the end of the 15-month workshops series, rpk asked campus teams to create a post-workshop action plan and reflect on the sustainability of their OER programs after participating in the workshop series.

Moving to Action

The action plans that cohort teams completed identified an issue to resolve or objective to accomplish to continue making forward progress on their OER programs after the conclusion of the workshops. Campuses outlined specific action steps to achieve that goal, anticipated challenges and potential solutions, as well as how they would monitor and measure success.

Campuses identified the following objectives, shown organized by the three major components of the sustainability framework:

Infrastructure: *Staffing/Organization Structure, Processes, Data Platforms, and Professional Development*

- Cultivate additional faculty OER champions by promoting professional development and grant opportunities.
- Create workshop and webinar series to guide faculty in locating and evaluating OER materials.
- Address barriers that prevent faculty use of ALM by providing professional development, defining terms and tools, and identify ambassadors to scale communication efforts.
- Add OER and ALM designation fields in Banner and incorporate into course submission workflows.

Resources: *Finances and Efficiency*

- No campuses identified resources in their action plan.

Culture: *Communication and Data/Metrics*

- Reignite faculty interest and awareness by increasing communication activities and approaches to scale growth.
- Build awareness of current OER materials and survey satisfaction.
- Improve data collection around OER availability and use, and improve OER visibility through course attributes and outreach to advising staff.

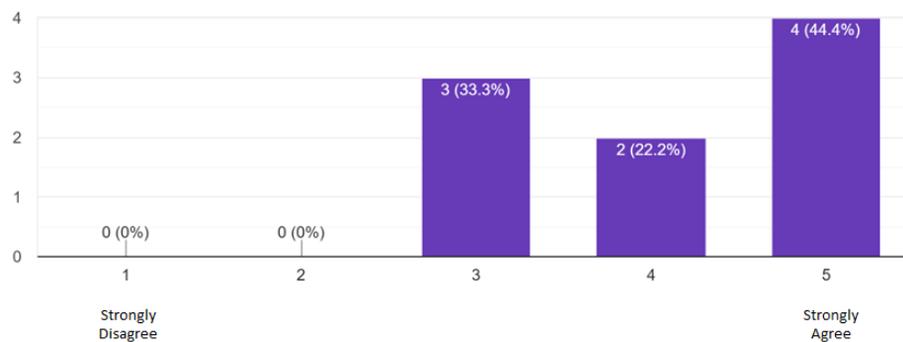
During the workshop series, guest presenters from the first cohort of colleges also shared progress they made since the conclusion of their workshop participation. Rockland Community College is using OER in its accelerated pathways and first-year experience courses to bridge the gap between high school and college, and scaling the work by replicating it across three high schools. SUNY Oneonta developed a general education pathway where students can meet all

requirements with OER courses; they used the pitch deck to address various campus groups, added custom data collection/reporting, and adopted a data-informed decision-making approach.

Cohort Reflections on OER Sustainability

rpk administered a post-workshop survey in December 2021/January 2022 to collect information on participants views on progress made in sustaining their OER efforts, the usefulness of the workshops in building their capacity around sustainability concepts, and feedback for rpk on the quality of the workshop series. Responses were received from nine of 10 campuses.

Figure 4:
The topics and content covered in the cohort workshops and activities have improved my understanding about sustaining OER on my campus
9 responses

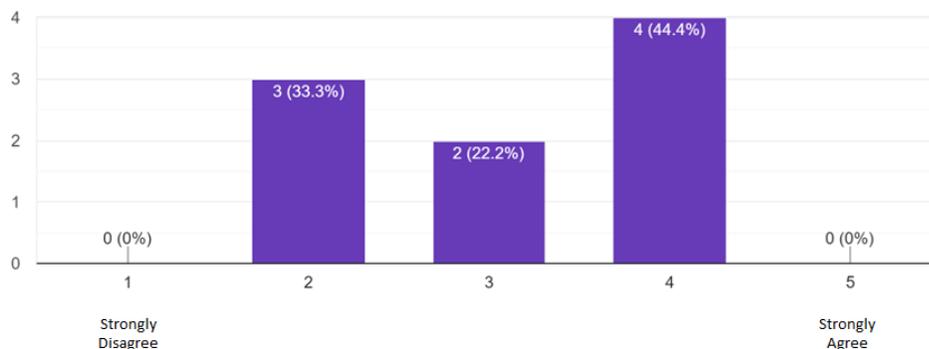


Two-thirds (66%) of cohort two respondents agreed that the topics and content covered in the workshops and activities improved their understanding about sustaining OER on their campus (see Figure 4).

When asked about progress on the 10 elements of the OER Sustainability Framework, a majority of respondents reported making significant progress on the campus vision for OER (56%) and the creation of OER Guidelines (67%), and nearly half (45%) reported significant progress on staffing/organization structure.

The highest incidence of “no progress made” was reported for data platforms, finances, and metrics (33% each) despite significant workshop time and deliverable activities focused on these areas. A lack of progress at some campuses may reflect their struggle to put in place systems to accurately collect and report data or add OER course attributes to their data systems.

Figure 5:
My campus has the necessary elements in place/in progress to sustain OER
9 responses



Campuses reported cautious optimism about having the necessary elements in place/in progress to sustain OER (44% agreed, 22% were uncertain, and 33% disagreed; see Figure 5). Respondents reported the sustainability of their programs would improve if they received funding for faculty and librarian development and hiring; advocacy and support from Deans; outreach to faculty and students; and better data reporting. Most respondents were uncertain (56%) if they could sustain OER growth and development without state support.

All respondents agreed/strongly agreed that participating in the cohort was a useful activity, increased their understanding of OER sustainability, and would help them function more effectively in their OER role. Nearly all respondents indicated the workshop quality was good or excellent.

Summary of Key Findings and Recommendations

1. **OER programs are projected to generate a positive return on investment to students *and* campuses.** Students easily recoup financial benefits from OER from reduced spending on course materials. Campuses also stand to earn positive net return on their investment because of OER's beneficial impacts on student course taking, even after accounting for OER program costs and additional instructional costs.
2. **OER start-up costs are heavily influenced by investment in OER course development.** These course development costs are expected to diminish as programs mature. Initial OER costs averaged \$125k - \$200k across campuses in the second OER cohort, but within four years ongoing costs are expected to average about \$100k annually as OER course development expenses taper off.
3. **Campuses will need to aggressively scale their OER enrollment goals for programs to become cost-efficient.** The median cost per student is \$100 across campuses participating in the second cohort because OER enrollment is expected to only reach a modest 3% of total campus enrollments. Campuses should focus on converting full courses and/or multiple course sections to OER, as well as high enrollment courses.
4. **OER data collection and reporting systems are underdeveloped at campuses in the second OER sustainability cohort.** OER leaders are beginning to explore more efficient data collection and reporting processes, and would benefit from ongoing support from peer institutions and/or the System administration to improve workflows.
5. **There is evidence of early successes in moving toward establishing sustainable practices.** This evidence includes gaining approval for OER task forces and committees, securing OER funding, pursuing improved data collection and reporting practices, and looking to infuse OER into other campus initiatives. Guest presenters from the first cohort also shared achievements in their OER work as a result of workshop participation, including expansion of OER into first-year experience courses, accelerated pathway courses, and an OER Degree. Overall, the guest presenters noted the workshop's impact on implementing processes to make data-informed decisions.
6. **Cohort campuses are cautiously optimistic they have the necessary elements in place or in process to sustain their OER programs.** Nearly 45% agreed their campus was prepared while 22% were uncertain.

Cohort campuses would benefit from ongoing support that builds upon the capacity and momentum created in the workshop series (e.g., strategies to scale OER offering, support in reporting and analyzing data and financial impacts). Campus teams also valued the peer engagement and opportunities to share best practices, challenges, and successes. Creating ongoing opportunities to maintain those connections will further leverage the groundwork already established from participation in the OER sustainability workshops.

Appendix A – OER Workshops Timeline, Topics, and Deliverables

OER Workshops – Cohort Two	Workshop Topics	Deliverables
First Year (2020-21)		
WS#1 – October 2020	Vision and Infrastructure	
WS#2 – December 2020	Platforms, Data, and Efficiency	OER Guidelines
WS#3 – January 2021 Individual Campus TA Calls on the Financial Model	Organizational Structure and Finances	Financial Model
WS#4 – February 2021 Individual Campus TA Calls on the Pitch Deck	Metrics and Communication	Pitch Deck &
WS#5 – April 2021 Campus OER administrative sponsors & select system leaders invited	Culture Change, Strategic Planning, and OER Progress	SUNY Sustainability Plan Update
Second Year (2021-22)		
WS#6 – September 2021	Communications and Organizational Structure	OER Infographic
WS#7 – October 2021	Metrics, Efficiency & Sustainability Extensions 1 (application of OER framework to other student success initiatives)	OER Data Analysis
WS#8 – December 2021	Culture, Planning & Sustainability Extensions 2 (infusing OER into other campus initiatives)	OER Action Plan
WS#9 – January 2022 Campus OER administrative sponsors & select system leaders invited	OER Progress, Lessons Learned and Next Steps	SUNY Sustainability Plan Update

Appendix B – Student Infographic Examples

SUNY Maritime

Are textbooks too expensive?
Try these free and low-cost books and online resources instead!
The average cost of textbooks and supplies per year is \$1240.00

OER Courses
Open Educational Resources (OER) are free and first-day access course materials.
OERs replace traditional textbooks and save students money!
Courses that use OERs are tagged on DegreeWorks and the Course Schedule under "Course Attributes: OER".

Benefits of OER
Hunting for a cheap textbook? Overwhelmed by the reading list?
Save time and money!
OERs are available on the first day of classes. Stress less by having immediate access to course materials.
OERs are free and low-cost. Saving you money for more caffeine and ramen!

Ask your instructors to consider OER course materials. The library can help!

To learn more about Free and Low-Cost Resources, visit <https://sunymaritime.libguides.com/oer>

SUNY Morrisville

WE HAVE HEARD YOUR VOICE!
YOU'RE SPENDING A LOT OF \$ ON TEXTBOOKS*

Responses over 1000
IN USD (\$)

0-99	100-199	200-299	300-399	400-499	500-599	600-699	700-799	800-899	900-999	1000+
10	20	40	45	35	25	15	10	5	2	1

THE COST OF THE COST
53%* OF MORRISVILLE STUDENTS DID NOT PURCHASE TEXTBOOKS BECAUSE OF COST
DIDN'T IMPACT GRADES 58.76%
IMPACTED GRADES 41.24%

87%* OF STUDENTS AGREE THAT TEXTBOOKS ARE TOO EXPENSIVE

WHAT DOES OPEN MEAN TO YOU?
OPEN EDUCATIONAL RESOURCES (OER)
What are they?
FREE OR LOW COST EDUCATIONAL RESOURCES!
TEXTBOOKS LAB MANUALS

YOUR PROFESSORS ARE ALREADY USING THEM
30+ COURSE SECTIONS SPRING 2019
BIOLOGY
BUSINESS
PSYCHOLOGY
SPANISH

WANT MORE OER AT MORRISVILLE? HELP US SPREAD THE WORD

*Based on data collected in 2018