What Does Free Mean? Orienting an OER Program Toward Sustainability

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Abstract

Good open educational resource (OER) assessment is an iterative and continuous process. While there are methodologies around assessment of OER use and quality, how an institution with an established OER program conducts an assessment of the overall program is highly localized. At Indiana State University (ISU), our library-led OER program has been in existence since 2011. The ISU initiative has identified significant cost savings to our students, the main aim of the program, while also compensating our faculty for the huge investment in time for course conversion. At the beginning of the Fall 2017 term, events transpired that necessitated a review of the program content, workflow, and process. What followed was a year of assessment, education, and reinvention. The author discusses the importance of capturing institutional
memory in the overall process of assessing the program and reviewing the qualitative and quantitative data of the initiative. Strengthening cross-campus partnerships to provide participating program faculty with 360 support throughout their time in the program and beyond and the challenges of building strategic partnerships are explored. Revising the material to incorporate OER-specific criteria and incorporating a tailored lesson on copyright as it applies to OERs is detailed. The adoption of project management software to streamline the workflow and frame process roles with the added benefit of providing another feedback loop for further continuous assessment is described. Finally the establishment of an assessment cycle for the program going forward will be discussed. The author includes a brief summary on what has worked for ISU, future directions, and continuing challenges.

**Keywords:** program assessment, open educational resources (OER), libraries, librarians, open educational processes

**Introduction**

Indiana State University (ISU) is a land-grant institution of higher education that serves a population of primarily first-generation college students and hosts the most diverse student body in the state. The university also serves a high number of Pell grant recipients and 21st Century college students (ISU, 2018). Greater numbers of traditionally underserved populations means ISU students often come into college with greater financial challenges that can be barriers to successful persistence rates. It is the open education movement’s principal goal of no cost, day-one access to high quality materials, which made the adoption of open educational resources
(OER) significant to ISU’s mission. OER are defined as “teaching, learning and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions” (Hewlett Foundation, 2018). While the materials created and curated in the open movement are free to use, there are still additional institutional costs that go into the process of a successful open educational initiative. These costs include personnel, systems, and time to produce quality content and training; “free” comes with associated costs (Annand, 2015, p. 4). Striking the right balance between training and support is a difficult challenge but a crucial task in assuring the future stability of an OER program. In Spring 2017, the OER program administrator, the Emerging Technologies Librarian, announced her departure from ISU. At that time, the Library Dean approached the Electronic Resources & Copyright Librarian to lead the ISU open education initiative. What followed was a year of discovery, strategy, and relationship building, resulting in a more sustainable OER initiative at ISU.

**History of the OER Initiative at Indiana State University**

A 2011 textbook affordability study led to the creation of the OER initiative at ISU. (ISU, c.) The program was conceived with the goal of reducing the overall cost of a student’s education at ISU to drive persistence rates by providing access to open and free course materials on day one. An advisory board on the initial design of the program included the ISU instructional design group, college deans, and teaching faculty. The OER initiative’s administration and process was led by the library from the start as part of the ISU strategic plan. Funding for the program, from the university’s strategic plan, provided for recruitment of teaching faculty, OER creation, and curation services. The program’s inclusion in the strategic plan also necessitated a reporting mechanism and static measures of success for the program to capture the overall
progress of the initiative in meeting its stated aims of student success through cost savings. The initial pilot in 2013 included the teaching faculty from the advisory board who were teaching courses as part of the ISU’s Foundational Studies program (ISU, 2013).

After the pilot concluded, the program evolved into its first stable iteration and included the admittance requirements and program elements that remain today. Courses eligible for the program include previously taught high enrollment major courses and those that are part of the ISU’s Foundational Studies catalog. Classes admitted must have been previously delivered in at least two prior semesters. Faculty members who complete the program and successfully transform their primary course materials to OER are awarded a stipend of $3,000. Crucially, courses included in the OER program have to demonstrate the ability through previous enrollment numbers to make back the initial investment of $3,000 in two semesters, another requirement of admittance.

The OER program includes a self-paced Blackboard course that faculty are required to complete during the conversion process to familiarize themselves with the definition of OER, their associated boundaries and possibilities, and integrating them into their courses. Upon delivery of the new OER course, students in the course are invited to participate in a pre-survey and post-survey administered at the beginning and end of the semester. The surveys, approved by ISU’s Institutional Review Board (IRB), include questions about students’ knowledge of OERs, their use, and student budgeting practices for textbooks. Students are encouraged but not required to participate in the surveys, occasionally with extra credit or similar incentives. To-date, the program has saved students an average of $420,120.58 a semester, with an average savings per student of $113.64 (ISU, n.d.- b).
Program Review

In Summer 2017, the Librarian who championed the OER initiative decided to leave ISU. To ensure continuity of the university’s OER initiative, the role of OER advocate transferred to the Electronic Resources & Copyright Librarian, who quickly began to assess the delivery of the program. The literature around the variety of roles for the library in open education efforts points to librarians’ foundational experience working with academic publishing models as a strong justification for the library’s continued leadership of OER programs (Borchard & Magnuson, 2017; Braddlee & VanScoy, 2019; Reed & Jahre, 2019; Salem, 2017). Previous experience providing reference services, licensing expertise, copyright guidance, and electronic resource management were extremely helpful in orienting the librarian in her new role, but the goals of the program and its desired growth made it clear that work was required beyond simple orientation. The first task was to evaluate the current state of the program.

OER efficacy and assessment studies tend to focus on the overall quality of OER artifacts (Hilton, Gaudet, Clark, Robinson, & Wiley, 2013; Ross, Hendricks, & Mowat, 2018); however, assessment of delivery of an OER program is highly localized. The assessment and redesign of the ISU program was decided on for three very specific reasons. First, the program itself had recently lost its primary administrator, which left it without strategic direction. Second, the course delivery had not been revised or revisited since its inception nearly four years prior as the program roster continued to grow. Third, the program materials needed to evolve to reflect the fast changing landscape of OER. Assessment was conducted through two exit interviews with the departing OER Librarian, a review of the program workflow and documentation, and feedback on the program experience from program faculty alumni.
**Exit interviews.** Ensuring the continued success of the OER program was a significant concern for the library. Much has been written about the value of storytelling and successful exit interviews (Siewert & Louderback, 2019; Spain & Groysberg, 2016) in preserving institutional memory. As a first step, the Electronic Resources & Copyright Librarian decided to focus on storytelling via exit interviews to preserve program processes and assist in the transition. The Emerging Tech Librarian’s timeline for departure was two months, during which time the Electronic Resources & Copyright Librarian scheduled two exit interviews. The desired outcome of these meetings was to establish the OER program’s administrative needs, the current process of deployment, and any additional reporting mechanisms or tools that needed to be identified. Each meeting was scheduled for approximately one and a half hours, with the understanding that additional time might be needed. The first meeting was spent storytelling: the Emerging Tech Librarian was asked to write a rough outline of her process and then verbally detail the process in the meeting. Additional notes for further elaboration were taken by both the Electronic Resources & Copyright Librarian and the storyteller to further flesh out the process and provide the needed institutional memory to continue the program. The second meeting was spent going through some of the actual activities identified in the storytelling session, namely survey data manipulation, Pressbooks administration, and reviewing participating faculty journal entries. Process details and notes from both the departing Librarian and new OER Librarian were captured in a new OER program digital memory folder on the institutional computer drive. Beyond the two formal meetings, the Emerging Tech Librarian provided outreach to OER institutional contacts on behalf of the Electronic Resources & Copyright Librarian to provide for a smoother transition post-departure. It was in the two exit interviews that a key detail emerged: the program’s Blackboard modules had not been reviewed since their introduction to campus
over four years ago. This was due largely to the growth and demands of the program as part of the campus strategic plan. The program was under the purview of two personnel: a library faculty member and a staff member from Institutional Research (who would also depart in Spring 2017), both with other full-time roles. Therefore, while the need for review was recognized, it had not taken place.

Data review. After the departure of the Emerging Tech Librarian, the Electronic Resources & Copyright Librarian, acting as the OER Librarian, began a deep dive into the gathered qualitative and quantitative data of the program. Going over the student reporting survey data, two main themes emerged. First, students were reporting satisfaction with using OER in class primarily because of the ease of use and cost savings. Second, in some of the course transformations, there was some frustration with the integration of the resources into course delivery (ISU, n.d.- a). Because any issue with integration of OER materials potentially impacts the success of the OER course transformation overall, the Electronic Resources & Copyright Librarian viewed it as an issue of concern. Additionally the librarian went over the data-tracking cost savings of the program. Of particular interest was the number of courses that had been converted and then reverted back to paid course resources. These courses were identified by picking a representative sample in the tracked conversions, then searching textbook holdings via the campus bookstore site. A standard letter was then written and sent out to faculty with paid resources asking if they would be willing to briefly provide feedback on why their courses reverted back to using traditional paid texts. Some indicated that there were department-wide mandated changes to all sections of the course requiring a single unified text. Others, however, stated a desire to continue with OER, but as the course continued, the materials’ perceived quality lead them to make changes. Frustration was expressed at the resources’ aging
interface or the speed with which the resources were updated. To the Electronic Resources & Copyright Librarian, these issues needed to be addressed in the program going forward.

**Revising the OER Program**

Through the process of reviewing the program, it became clear that course design and the education of the copyright and licensing of OERs needed to be revisited and addressed. Additionally the exit interviews with the Emerging Tech Librarian identified a lack of time and support as a barrier to meeting the demands of the program. To strengthen delivery and sustainability of the program, the Electronic Resources & Copyright Librarian recognized that a team approach would be needed if the OER initiative was to continue to be successful at ISU. In order to provide much needed support and sustainability for the program, the Electronic Resources & Copyright Librarian met with the ISU Instructional Design Group in Fall 2017 to build trust and re-engage the group with the goal of creating a new OER team. The inclusion of instructional design is recognized throughout the OER community as a valuable strategy to successful growth of open education initiatives (Braddlee & VanScoy, 2019; Pierce, 2013), and indeed the group was part of the original conversation around OERs at ISU. With the ISU instructional designers on board, the program revision began in earnest with a look at the Blackboard course content.

**Content changes.** To kick off the process, the Electronic Resources & Copyright Librarian identified areas within the current Blackboard course modules that needed revision in specific areas including issues of copyright and attribution, defining and identifying OER, and providing guidance on successful incorporation of the selected materials into a course. The librarian divided the modules amongst the team to assess and suggest redesign elements. Areas that saw significant revision during this process included the copyright and licensing lesson and
the lesson on searching and identifying OER materials. Beyond specific modules, work was done on assessment materials within each lesson and a new rubric for OER assessment was incorporated to provide further guidance both during and beyond the program.

The copyright module redesign was a particular sticking point for the team, as the instructional design group’s preference was to cover all areas of copyright online beyond the limited scope of OER. The Electronic Resources & Copyright Librarian had to work with the design team to help focus the materials in a more direct way around the successful engagement of OERs in the classroom. The librarian noted that significant demands on teaching faculty time meant they needed to be able to quickly orient themselves around issues of OER and copyright and then confidently move on to the course-building process in quick succession. Additionally, the instruction had to be focused enough to ensure that the information could be utilized successfully by faculty beyond a single course conversion. The lesson on defining and identifying OER was revised to include the explosion in content types and resources that had emerged since the ISU OER program’s inception. Content was added around multimedia resources, identification, and attribution. Along with lesson content, module assessment pieces (SoftChalk quizzes and Blackboard journal entries) were also modified to support the new content. Another significant change to the program was the introduction of an OER-specific rubric as part of the course conversion process, adopted from the Achieve model (Achieve, 2011). Originally created to assist the K-12 environment, the rubric was adapted for higher education and specifically for ISU. The rubric incorporates accessibility, usability, copyright compliance, assessment, and objective alignment goals to provide faculty with a lens through which they can review the incorporation of OER materials beyond a single course. Content
revisions identified and applied, the second phase of the course redesign discussion was initiated: designation of responsibilities in the course workflow.

**Designing the team approach.** To strengthen and define the new cross-campus partnership, the OER team met to discuss a new workflow map that details the alignment of a faculty member’s progress through the Blackboard course and their interaction with the support team (the Electronic Resources & Copyright Librarian and one assigned instructional designer). In the previous iteration of the OER education delivery, faculty received minimal feedback via two journal entries and a single in-person meeting at the beginning of the course redesign process. After considering the changes to the program materials and desired results of the program for faculty, the team settled on three tailored meetings for faculty. The first meeting would take place after faculty had gone through the introductory module in Blackboard and before they began the process of investigating open materials, a second mandatory meeting midway through the program as they began to build their course, and a third optional meeting prior to delivery of the content, each meeting with its own goals to assist faculty in their conversions.

The first meeting’s goal was to allow faculty time to address their open resource search needs and copyright concerns with the OER team prior to building their course. This first meeting effectively acts as a reference interview with faculty in which the OER Librarian can build iterative searches of open materials for the courses in conversion. Searching by librarian is a new addition to the process, with the dual goals of further guiding faculty towards how and where to find quality open materials and alleviating any information overload the faculty in the program might experience as they wade through open resource sites. The librarian shares keywords and sites where materials in their discipline are found, as well as highlighted materials
for inclusion in the course. As subject matter experts, faculty members make final decisions on what materials will work or not for their course. The second meeting is scheduled as the faculty members begin to engage with the OER rubric to address their student engagement and learning outcome concerns. Here the librarian and instructional designer provide feedback on attribution, course delivery, and design. Finally, the third optional meeting is arranged after the faculty member has produced three weeks of course content for overall review of design, copyright, and appropriateness of open educational materials. If the faculty member elects not to meet in person, the librarian and assigned instructional designer each conduct a three-week review of the revised Blackboard course site and provide in-depth email feedback to the faculty member. This final review is an important new addition to the course conversion process with the intent of creating a more meaningful and lasting conversion experience, greater program accountability, and fostering faculty OER champions. With details captured in the team workflow map attention turned to documenting the program management process and imbuing the program with a flexible assessment schedule to ensure success both for the team and the university.

**Capturing the workflow & assessment schedule.** A team located across different departments and physical locations requires a portable and accessible tool to capture the workflow in its entirety. Teamwork PM, project management software utilized by the library, allows for the creation and curation of documents, notebooks, custom tagging, artifact assignment, and timeline tracking for teams. The software was extended to the instructional design group as a new portal for program workflow. The newly adopted team workflow document was uploaded to the site as a living document. Teamwork PM allows the group to document their work throughout the process captured in the workflow map. Upon acceptance of an applicant to the OER program, the Electronic Resources & Copyright Librarian, as program
manager, uploads the application and any feedback provided to the faculty at this stage. The faculty members going through the program are then assigned via tag to a single instructional designer. Additionally, each course conversion is assigned a notebook that includes thoughts on the process from beginning to completion.

Though some reporting elements existed in the program already (i.e., student surveys, savings data, course numbers) there was no defined review timeline for the program content or delivery. The Electronic Resources & Copyright Librarian felt an assessment cycle for program content and delivery should be established for the program to ensure that the initiative remains relevant and that the workflow functions in its most effective form possible for all involved.

Program content is to be reviewed on a tri-annual basis, with links and other embedded elements assessed for quality once an academic year in the summer. The workflow itself will remain in use and adjust flexibly as institutional and departmental aims dictate. Changes to the workflow must be captured in the workflow map document. Finally, courses that go through the conversion process will have an added “check in” at the four semester delivery mark to see if faculty are still achieving their learning goals or if they need additional support in identifying new materials.

Overall the inclusion of two different professional lenses to view the program (Instructional Design and Librarianship) further strengthens the program and provides greater support for faculty throughout and beyond the program.

Next Steps and Conclusions

After the departure of the institution’s OER administrator, the Electronic Resources & Copyright Librarian had to acclimate quickly to provide expert consulting on OER. As part of that process, the librarian led the reexamination and redesign of the OER conversion process, strengthened cross-campus partnerships for success, and identified workflow strategies that
provide greater efficiencies for the program. While several critical issues were addressed, challenges remain: perhaps most critically, the overall desire for greater open educational support still at times outpaces the capabilities of the small team assembled. As previously touched on, while the nature of OER means the materials are free, training and resource support at the institutional level comes with significant cost. Free means providing comprehensive and effective OER services to faculty while generating more savings than costs for our students. The process of review, redesign, and partnership was challenging at times, but a rewarding one that produced a revised OER education program and a scalable team approach to support sustainable OER adoption across the university that will ultimately benefit students both financially and educationally, beyond their time at the ISU.

The revised Open Educational Resources Program has now gone through four semester cycles. The next steps for the program include possible reassessment and revision of the questions included in the OER student course pre-surveys and OER student post-surveys distributed in participating courses. As with the other program content, the IRB-approved questions have not been appraised since their initial rollout; it is crucial to review the questions posed to students regarding their learning preferences and engagement with the new open educational course content to ensure we continue to ask the right questions to measure success. With the introduction of additional support and checks for understanding by the OER team, teaching faculty feedback on the course conversion process is crucial to assess how well or poorly the changes to the OER educational modules and support system are working. Once the team goes through the first assessment cycle, more information regarding the impact of the program changes will be fully known. As the team goes through the process currently, having clarity over roles and workflow has given the team confidence in working together for faculty
enrolled in the program. We have also received related positive feedback from faculty members who have participated in the program already. Outside of the OER program, the Electronic Resources & Copyright Librarian offered a workshop on OER to other interested library faculty to convert critical liaison colleagues into in-house OER champions and provide professional development for the other librarians. Further, in Spring 2019, with the support of the Student Government Association, the Electronic Resources & Copyright Librarian reestablished the Open Educational Resources Committee with ISU students, faculty, and administrators to continue to think of new ways to market OERs and encourage their adoption and creation across the ISU. The efforts taken together continue the important work of moving the ISU OER Program forward.

References


Appendix A

Excerpt from OER Team Workflow Map

TEACHING WITH OERS

APPLICATION

1. Applications are directed to **eResources & Copyright Librarian**, who will vet individual applications for completeness and program eligibility.

2. **eResources & Copyright Librarian** will add application to FILES in Teamwork PM, tagging with expected semester the converted course will run and email **IDers** to make them aware of new participants.

3. **eResources & Copyright Librarian** will:
   a. Add applicant as **STUDENT** within Blackboard Teaching with OERs course site
   b. Email faculty member to acknowledge acceptance, provide timeline, and have faculty member request development site
   c. Email **IDers** to let them know of the new participant and need for assigned IDer.

4. **(Instructional Technology Assistant)** should check ID email box daily. If a new OER participant appears:
   a. Assign it to appropriate or available **IDer**.
   b. Email Assigned **IDer**, notifying of assignment.
   c. In Teamwork PM, tag the FILE with the assigned IDers first name.

5. Upon being assigned a participant, **IDer** will reach out to faculty member via email to introduce self and offer support throughout the process.

MODULE 1: INTRO & PURPOSE OF OERS

1. Faculty member completes **SoftChalk Lesson #1 and Journal #1**.
   a. If faculty member does not earn passing grade on SC lesson, **eResources & Copyright Librarian** will email the faculty member to check on areas of concern and offer support.

2. **eResources & Copyright Librarian** will grade and provide feedback on **Journal #1**.

3. **IDers** should read/review participant **Journal #1** and gather information about faculty member and course.

4. **eResources & Copyright Librarian** and **IDer** will add notes to Teamwork PM > NOTEBOOKS (labeled with faculty member name and course number), if desired.
1. Faculty member completes **SoftChalk Lesson #2 and Copyright Quiz**.
   a. If faculty member does not earn passing grade on SC lesson, **eResources & Copyright Librarian** will email the faculty member to check on areas of concern and offer support
2. **eResources & Copyright Librarian** will review and grade **Copyright Quiz**. Faculty must earn at least 80% on the quiz. They may retake quiz up to three times.
3. **eResources & Copyright Librarian** will contact faculty member (and **IDer**) notifying of assigned IDer and to schedule the **FIRST CONSULTATION**:
   a. **Suggested Week:** 3
   b. **Participants:** eResources & Copyright Librarian, IDer, faculty member
   c. **Primary Goal:** Learning Context Analysis, Establish Goals