

OER Strategic Planning Recommendations

Document Purpose:

Outline six strategic planning recommendations employed by other institutions to strengthen the likelihood of success for open educational resources (OER) initiatives focused on affordability and student success. These recommendations have emerged, based on the experiences of other institutions working with Lumen and Follett.

1. Create an Advisory Committee

Advisory Committees can bring together differing viewpoints and work to formulate policy and direction. They are also essential in generating collaboration and support for OER initiatives across the organization.

- ❖ Eight to ten members can provide diverse perspectives, but it is a small enough group to formulate cohesive policy and direction.
- ❖ Consider including a mix of individuals in the following roles:

- administrative leaders
- faculty members
- academic leaders
- faculty support leaders (teaching & learning center, library, etc.)
- student services leaders
- student government leaders

2. Set Measureable Goals

When institutions set measurable goals about the type and level of impact they want to make with OER, they lay a stronger foundation for achieving their goals for meaningful change in affordability and student success.

- ❖ Institutions may consider measurable goals in a variety of areas: textbook cost savings, passing rates, retention and withdrawal rates, number of students impacted, number of courses/faculty adopting OER, reenrollment rates, and so forth.



- ❖ Follett can assist the institution in understanding where textbook costs have the biggest negative effect on student success.
- ❖ A Follett report could also provide the college with information needed to target courses where they can provide the largest impact for students, based on analyzing course enrollments, textbook cost, and sell-through rates.

3. Define Your Focus & Direction

For institutions engaged in initiatives targeting affordability using OER, most have found it makes a huge difference to thoughtfully identify a clear and well-coordinated path forward. Not surprisingly, a cohesive, planned approach is nearly always more successful than haphazardly affecting change through a less-structured approach to OER adoption among faculty. Institutions that don't have a clear focus may experience initial success, but typically they struggle to sustain and achieve deep and lasting impact.

Historically institutions have identified one of two basic adoption models that help to channel their focus and efforts. Either may be effective, depending which is the best fit for your faculty, students, and resources available to support OER adoption.

1. Textbook Replacement

Instructors choose to replace the textbook and other traditional publisher materials with a high quality, affordable OER product that is consistently maintained and updated, where the instructional design focuses on improved student success. This model emphasizes finding suitable OER replacements for expensive textbooks and keeping the course structure largely intact, rather than fundamentally redesigning course using OER.

2. Course Redesign

Instructors work on a complete redesign of the course, including instructional design and comprehensive course materials and assessments. The redesign process seeks to incorporate high-quality, existing OER materials, often with assistance from the Lumen team.

4. Identify Adoption Opportunities with Mature OER

OER initiatives frequently involve assessing initial faculty interest or receptivity to OER adoption. It is important to take this assessment a step further by aligning courses to available, high quality OER materials. Faculty members are universally



happier with OER when their starting point is mature, good-quality OER, and unfortunately many OER initiatives lose steam when faculty members become discouraged by the quality or completeness of the OER content they're working with.

This due diligence process would ensure that the institution focuses on courses where 1) high quality OER are currently available, and 2) faculty members are receptive to exploring OER adoption.

- ❖ Lumen can provide a list of existing mature courses as a starting point.
- ❖ The institution could identify interested faculty/courses/disciplines.
- ❖ Lumen could assess the amount and level of OER resources available for the identified courses, and make recommendations about how to proceed.

5. Consider Faculty Incentives

The institution should consider what type(s) of faculty incentives are available, and which align with the institutional culture. Some of the incentives other institutions have utilized are:

- ❖ Monetary
- ❖ Recognition
- ❖ Institutional, Lumen and Follett support
- ❖ Travel and conference registration to the annual [Open Education Conference](#), or other conferences that offer professional development related to OER.

6. Conduct and/or Join Research Studies

Research studies are critical to confirm the effectiveness of any initiative, and OER projects are no exception. Fortunately lots of work is being done in this area and institutions can benefit by building on the efforts of those who have gone before.

Many Lumen customers participate in an ongoing national research study to quantify and understand the impact of their OER adoption efforts.

- ❖ Lumen can connect the institution to the Open Education Group, a research team housed at Brigham Young University (BYU). This group helps institutions collect useful student and learning data and analyze it to understand the impact and efficacy of OER initiatives.
- ❖ [OER Research Toolkit](#): This toolkit provides guidance on doing in house OER research.