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Practice

Promoting Open Educational Resources

A Beginner's Playbook

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The awareness, adoptions, adaptions, and publishing activity around Open Educational Resources (OER) vary greatly among institutions of higher education in Pennsylvania and beyond. This article provides an overview of the paths and efforts, described as preparation and plays, that I have taken to promote OER at Kutztown University and around the state as an OER Specialist for the Affordable Learning PA Project. While this article focuses on tactics for beginning OER promotion, readers who are further along in their efforts to develop and support OER projects may find some new ideas to explore and expand upon at their institutions.

Introduction

Why choose to promote Open Educational Resources (OER), or why choose to play *this* game? Saving students money is often the initial impetus. This cost-savings is enough of a reason to launch an OER promotion campaign. Students are now under more financial pressure than ever before, and faculty who adopt OER can provide significant relief.

As a team grows and becomes more familiar with OER and their properties, the focus may shift to supporting OER for other reasons, such as adapting existing OER to meet local needs, increasing affordability of access to course materials, or the freedom and empowerment of using open pedagogy techniques. This article will lay out the tactics, or plays, to find and engage OER supporters, raise awareness, and drive OER adoption on campus and beyond. It is intended as an illustration of one path for transforming a campus from having little to no knowledge of OER to the point where adoption and interest in OER are beginning to take hold. It is not offered as a prescription that will lead to an outcome but as a set of ideas for readers to consider as they begin to play the OER supporter game.

Literature Review

Bell and Salem (2017) called for a textbook affordability program in all Pennsylvania academic institutions and indicated that OER promotion techniques are shifting from passive, wait-until-asked strategies to more active ones that seek to promote existing OER to faculty who may be interested in adopting them in their teaching. Ohio is well on its way to establishing a statewide OER program. Bendo and Evans (2019) described OhioLINK's efforts to develop Affordable Learning Ambassadors who conduct OER workshops based on the Open Textbook Network (OTN) workshop model. The Pennsylvania Academic Library Consortium, Inc. (PALCI) has implemented a similar program in Pennsylvania. Eight OER Specialists, including myself, conduct OTN workshops and other OER training virtually and around the state. McBride (2019) reports that the State University of New York system has been working on OER issues since 2012 and that New York State announced funding of $4 million for OER programs in both 2017 and 2018.

Crozier (2018) described the process Ohio Northern University took to iterate strategies to improve faculty attendance at OER workshops, including broadening their scope to include open publishing and leveraging established library liaison relationships to create personal invitations. Martin and Kimmons (2020) detailed four hurdles to OER adoptions: 1) limited understanding of OER; 2) lack of a consistent method to evaluate textbook quality and limited understanding of copyright issues; 3) difficulties experienced when trying to find, remix or create OER; and 4) concerns about how to sustain OER use with limited resources. Strategies developed to promote OER should be informed by these themes.

Bazeley et al. (2019) detailed a program of tactics rolled out in support of textbook affordability at Miami University (Ohio) that included robust efforts and funding for programs promoting exploration, adoption, and creation of OER. The program also offered faculty $500-750 in professional development funds for working with librarians to find and use library-funded content for course materials for their classes where no adequate OER exist.

This paper focuses on the very beginning steps towards OER promotion, but there are a number of excellent and more comprehensive resources on getting started with OER. Elder's 2019 *The OER Starter Kit* (bit.ly/2IkH1R0) includes chapters on Getting Started, Copyright, Finding OER, and Creating OER. *The Open Education Primer* (bit.ly/3ljduFx) by Allen (2018) includes chapters on practices, policies, creating and adopting OER, publishing, and many other topics. The Consortium of Academic and Research Libraries in Illinois (CARLI) Toolkit (bit.ly/36uB1xf) provides links to editable OER handouts, faculty and student surveys, and grant programs. These and many other resources offer excellent materials for both beginning and more advanced OER promotion efforts.

The literature indicates a wide range of funding levels and programs, both ambitious and modest, supporting OER use across the region and beyond. Reflect on these initiatives and consider how they might be relevant to guiding development of programs at your institution.

The Fundamentals

Definition of OER

OER promoters do not need to be experts before beginning to execute plays; a good grounding in the subject will suffice. We begin with a definition of Open Education from Creative Commons (n.d.):

Open Educational Resources (OER) are teaching, learning, and research materials that are either (a) in the public domain or (b) licensed in a manner that provides everyone with free and perpetual permission to engage in the 5R activities.

- Retain – make, own, and control a copy of the resource
- Reuse – use your original, revised, or remixed copy of the resource publicly

- Revise – edit, adapt, and modify your copy of the resource
- Remix – combine your original or revised copy of the resource with other existing material to create something new
- Redistribute – share copies of your original, revised, or remixed copy of the resource with others (para. 2)

Understand Motivations

Promoters should learn the basics of OER that their primary audiences will be most interested in before beginning. Engaging faculty who choose textbooks and other course materials for their classes will be critical to the success of OER promotion efforts. Faculty will likely be most interested in understanding issues related to the quality of OER. The Review Project (openedgroup.org/review) is an excellent resource to find studies related to OER efficacy and perception. The project includes short descriptions and links to a large number of studies. Readers with limited time should consider starting with the Colvard, Watson, and Park (2018) study, which is known in the OER community as "the Georgia Study." Knowledge of this study will also be helpful when engaging administrators, who will likely appreciate hearing about the increased levels of student success and persistence, particularly among Pell-eligible students.

Students will be interested in the money-saving and ease-of-access aspects of OER. A great resource to review before engaging student groups is the Open Textbook Alliance's Student Government Toolkit (bit.ly/3eOeizO). Knowing the Creative Commons definition of OER, reading the Georgia Study and Student Government Toolkit, and looking over the entries on the Review Project empowers promoters to begin implementing OER plays on campus. Before making a first request to engage audiences, pause to reflect on your perspective overall strategy.

Survey the Field

Who will be engaged first? To answer this question, consider who has the power to select course materials and textbooks. Is the answer faculty? Do they always have the power to select what they wish? At my campus, faculty do choose course materials, but they do not have complete discretion to do so in all cases. Some departments have chosen a particular text for all sections of a course. This is a likely scenario where faculty seek to teach a common body of foundational knowledge in lower-level classes which is necessary for success in more advanced courses. Certain disciplines may have an unofficial standard introductory text that is used semester after semester without question. Challenging the status quo might represent a risk for some faculty. At some institutions, administrators may choose which textbooks are used. Those who are free to make textbook choices will be the main focus of promotion efforts, but further granularity is suggested before running your first OER play.

Manage the Clock

Take time to consider the timing of engagement. Be aware of the ebb and flow of faculty workload throughout the semester. If an institution's campus bookstore has a suggested deadline for faculty to place textbook orders, use that to inform the timing of promotional events and outreach. At my institution, those deadlines are October 15th for the spring semester and March 15th for fall. To have a chance of success, OER programming will have to occur well before these deadlines to allow for the discovery of candidate OER and their evaluation. I avoid engagement during the student advising window. Outreach or events held immediately after midterms, when faculty have heavy grading loads, may be suboptimal as well.

Gear Up

After identifying individuals or groups who may have interest in learning more about OER and developing a schedule of engagement, promoters should explore which OER are available in the disciplines of faculty participants. OER search engines like OASIS (oasis.geneseo.edu) from SUNY Geneseo and the Mason OER Metafinder (mom.gmu.edu) (MOM) from George Mason University are good tools to explore OER availability. The Open Textbook Library (open.umn.edu/opentextbooks) and OER Commons (www.oercommons.org) are two repositories of OER that may be helpful. Rice University's OpenStax Project (openstax.org) has focused on creating sustainable, high-quality OER textbooks for the courses across the nation that traditionally have had the highest number of students enrolled and that also generally use expensive textbooks. Math and science textbooks dominate the collection, but a new business textbook collection was recently released. There are a few humanities and social science titles that are in wide use, too. Many of the OpenStax texts are available at low cost in print editions. Although the online and downloadable editions are convenient and very popular, print editions can be taken to meetings to allow attendees the opportunity to evaluate the quality of the materials in their physical form.

Find Focus

Develop a bias toward action that will directly engage the people who make textbook decisions. It is possible to spend a lot of time preparing beautiful marketing materials and websites or perhaps Springshare LibGuides that will not drive a single OER adoption. However, it is important to have an anchor web presence to refer interested potential adopters to. Consider borrowing content from existing sites. The Mason OER Metafinder site includes a massive trove of links to over 400 sites who use MOM (bit.ly/2UhR7o6). Scroll down to the section titled "Who's using the Mason OER Metafinder (MOM)?" to see the extensive list of OER websites from which to possibly borrow content. If your institution subscribes to Springshare, or some other web content management system that allows content sharing, consider sending a request to the creator of an existing site and asking to 'borrow' its layout and content.

Recruit Team Members

Librarians are experts at finding and sharing resources. This expertise easily extends to OER. They are not typically experts in evaluating textbooks and using them in teaching. Recruiting faculty who have successfully used OER in their teaching to an OER promotion team will add credence and authenticity to the effort. Faculty experienced in teaching with OER will be able to answer questions from potential adopters in ways that librarians cannot. It may be difficult to identify and recruit faculty who are experienced with OER, are willing to share their experiences with others, and also have the time to do so. Two techniques to identify existing OER users interested in sharing are emailing faculty via listserv and asking the campus bookstore faculty liaison for potential team members. Other channels could include asking department chairs, academic deans, and importantly, department administrative assistants. Lastly, if you have difficulty recruiting faculty, consider that a search is not necessarily limited to faculty at a single institution. Consider reaching out to nearby institutions, if necessary.

At my campus, recruiting students and administrators was approached with great care. Faculty at the institution have strong authority over the selection of course materials and student learning outcomes are the main driver of the choice of materials. Student-run social media campaigns to raise awareness of textbook costs may be perceived as an intrusion into the area of academic freedom by faculty. At many institutions, some tension exists between administrators and faculty. Notwithstanding this, administrators can provide resources for OER efforts, such as allocating funding and human resources. Students could bring high-energy engagement to OER promotion efforts. Student voices, when added to OER promotion efforts, can have a powerful and profound effect on administrative support as well. Administrators who have responsibilities in the area of student success and persistence are good candidates for inclusion on OER teams. Student leaders from Student Government Association units like Academic

Affairs Committees may be interested in OER efforts. Potential recruits from the ranks of student library workers may appreciate the opportunity to participate as well. All students have a textbook story to share.

Adding available free agents to the team can help jumpstart OER promotion efforts. For example, PALCI's OER Specialists are available to assist in creating and delivering OER programming at institutions across Pennsylvania. Many other states have equivalent programs. Much in the same way as student voices can have a powerful effect on administrators, a voice from outside of a home institution may resonate with audiences more powerfully than an internal one would. Social media and web-based content created by OER leaders may be used to add virtual members to the team. Readers are encouraged to explore content from OER champions Nicole Allen (bit.ly/3knsXD6) and David Wiley (bit.ly/3kj9Slz) as well as open pedagogy leaders Rajiv Jhangiani (thatpsychprof.com) and Robin DeRosa (bit.ly/3eWHd4U). There are many other OER experts who should be included in this list, but these will provide new OER promoters good content to explore as a start.

The Plays

Play #1 Seek to be Invited

It is likely that no one on your campus is actively seeking information on OER. OER promoters inclined to create an elaborate OER web presence should read Hertzman's (2015) *Entrepreneur* article "If You Build it, They Will Not Come" (bit.ly/3kuvlbz). Perhaps heeding the message of the title will be sufficient and may save you more time. Skip the website storyboards, focus groups, coding, and choosing of fonts and seek to be invited to speak about OER to people who may be interested in adopting them in their teaching or supporting them for one of their many value propositions like saving money, increasing access to course materials, and empowering open pedagogy.

I brainstormed a list of invitations to seek; created a reusable two-paragraph script email (See Appendix A for a draft example) that defined OER; asked when the organization, unit, or group would have time for a brief 10-minute presentation; and sent the email. The total time invested for this preparation was less than an hour, with most of that time spent figuring out email recipients. Each institution will have a list of places to be invited to, but here are some suggestions:

- Student groups: Student Government Association, especially an Academic Affairs Committee, if it exists. Honors Program, Student Newspaper.
- Faculty: Senate, Center for the Enhancement of Teaching, Chairnet (all department chairs attend), Individual academic departments, New faculty orientation sessions.
- Administration: Provost, Student Success Executive Group, Registrar, Grant Office.

The play to run for discussion groups is to have a short presentation, perhaps 5-10 minutes long, designed to share basic OER information. I have created a short PowerPoint presentation for these initial OER sessions (bit.ly/38oolul).

Lessons Learned While Running Play #1

Presenting for a longer amount of time risks annoying participants who may have lengthy agendas to get through. A useful tip when beginning these presentations is to start with lower risk, low-stakes audiences first. A session for colleague librarians is an ideal place to start. This audience will provide a chance to practice the presentation, see what kind of questions typically get asked, and hone the presentation for more high-stakes sessions.

Consider passing around a sign-up sheet offering to connect with participants for one-on-one consultations who are interested in learning more about OER. I collect names, departments, and preferred contact information, either

email or phone number, by passing around a legal pad that has a handwritten header with columns for each category. Increase sign-ups by putting your name and contact information on the sign-up sheet. This example will show visually how to enter information on the form and help ease any resistance to being the first and potentially only person to sign up. If it is possible, prearrange to have the first person who receives the form agree to sign up. This will lower the resistance to signing up even more. In my experience, if none out of the first two or three attendees to receive the form sign up, it is likely that no one in the group will, even if they would otherwise be interested.

Play #2 One-on-Ones

The second play can be run after conducting the initial short presentations. These short introduction talks, given at every opportunity, will garner requests for both individual consultations on OER and requests for more substantial presentations to groups. I also use direct emails and notices in university bulletins inviting interested faculty to fill out a short form requesting a consultation session (See [Appendix B](#) for an image of the form). The form was created using Springshare's LibWizard. OER promoters without access to Springshare tools could create a similar version using Google Forms, Qualtrics, or their preferred form building tool. Suggestions for one-on-one meetings include developing a checklist for each request that can be used to keep track of participant details, communications, relevant OER searches, and other pertinent information about the process. My version was created in Microsoft Word. Information that requesters enter on the consultation request form is pasted on the top of the tracking form. (See an example in [Appendix C](#)).

Lessons Learned While Running Play #2

There is a lot of good information to share regarding OER, but I recommend allowing for a significant portion of the allotted consultation time for listening. Faculty exploring OER may have a specific reason for doing so. OER promoters should find out which problem the faculty member is seeking to solve before attempting to solve it. After identifying the problem that they hope OER may solve, offer to search for and send them a reasonable set of OER materials for them to review, if they exist, or offer to show them how to search for OER if they are interested in doing so by themselves. After identifying candidate OER for them, it may be helpful to remind them that they are the expert and arbiter of quality for textbooks in their field. At the end of the consultation, I ask if they will be adopting an OER. If the answer is no, I follow up to discover the barriers to adoption. These one-on-one consultations have proven to be strong drivers of OER use at my campus.

Play #3 Conduct Full OER Workshops

A third play to run is to host full OER education sessions. A good source of material for longer OER sessions is the Open Textbook Network's slide deck "[Open Textbooks: Access, Affordability, and Academic Success](#)" (bit.ly/35mdXRO). This deck is licensed under a Creative Commons Attribution license that empowers OER promoters to reuse, remix, and redistribute the materials as they choose. Here is the [Open Textbook Network Workshop slide deck modified for Pennsylvania](#) (bit.ly/36oN2UE). Eight OER Specialists are available in Pennsylvania to help develop programming and present both custom sessions and to assist with delivering the full Open Textbook Network workshop. Many other states have similar programs. Find more information about Pennsylvania's OER Specialists on PALCI's [Affordable Learning PA (ALPa) website](#) (www.palci.org/alpa-about).

Lessons Learned While Running Play #3

Inviting faculty to attend an Open Education Network workshop and to complete a review of a textbook within the Open Textbook Library has been an effective way to increase OER adoptions at my institution. Small

stipends of $200 for attending and completing the reviews have been offered as incentives to faculty. At my institution, administration has required that these stipends be used for funding professional development activities. Funding was provided out of the regular library budget. Stipend availability was limited, usually to the first five participants to register and complete the requirements.

Play #4 Engage with the Open Community

The fourth play to consider is to seek deeper involvement in the OER community. The ALPa program offers frequent workshops and webinars as well as an annual conference on OER topics. Many other regional, national, and international OER conferences exist, and OER sessions at more general library conferences are now commonplace. SPARC (the Scholarly Publishing and Academic Resources Coalition), Creative Commons, the Open Education Network, and OpenStax offer further opportunities for training and certifications. Connections made at training and conference events will help to build a network of OER supporters to help promoters become more effective at driving adoptions, adaptions, and creation of OER materials.

Play #5 Adopt an Open Mindset

The last play is to consider adopting open as a personal ethos. OER promoters should be aware that companies are creating paid content and functionality based on OER materials. In some cases, this content may add significant value for both instructors and learners. EBSCO's Faculty Select is a paid product that combines OER and digital rights management-free search functionality which may be useful when time and human resources are constrained. Homework platforms complementary to specific OERs are being created and are available at fees that are often far lower than those of comparable commercially developed ones. Some of these companies allow instructors to modify existing OER then charge students for printing the custom OER editions. Such companies may charge students royalties on behalf of the instructor. While using these paid products can lower the burden of changing to OER, there are often truly free and open alternatives available. Policy regarding how instructors and companies may benefit from their choice of course materials should be examined before promoting such "value added" OER products and companies.

Where time and resources permit, consider using OER in your own teaching. When publishing, seek open access publications. Consider learning about and supporting the free and open source software movement (FOSS). *Open* (bit.ly/2IiNbRL) by Jhangiani and Biswas-Diener (2017) and Suber's (2012) *Open Access* (bit.ly/oa-book) are excellent resources for learning more in this area.

Conclusion

Although specific, the preparation steps and plays to run in this article are not meant as a prescription to be applied without modification at other institutions. They were developed and honed at a medium-sized, public institution with a strong faculty union, where department chairs are influential in how pedagogy operates at the university. They are offered as an incomplete and imperfect set of examples of plays or tactics that have had some success in driving OER use in that environment. Large funding resources, other than staff time and attention, were not needed in developing and delivering most of the OER programming described. Try the preparation recommendations and plays that may be appropriate for your institution with appropriate modification. In the spirit of OER, use what is helpful; modify, iterate, and improve what is not; and disregard the rest.

The plays offered in promoting OER are simple to follow but not necessarily easy to implement. Challenges to execution will include time, funding, and interest constraints. Major issues with OER themselves may be problematic. There are not OER available for every course, and some may not meet the quality standards your faculty desire. Ancillary materials like test banks and lecture slides may not have been developed for an OER. OER exist in

siloed locations, and searching for and finding them can be time-consuming. Lastly, these plays represent the first steps in beginning an OER promotion effort. There is much more to learn and do towards creating a robust OER infrastructure.

Despite these challenges, work done promoting OER is rewarding. Saving students money, empowering new ways of learning through open pedagogy, helping to level the playing field for all learners through more equitable access to course materials, and participating in the open education community are all rewards OER promoters can expect to accrue for students, faculty, and themselves as they begin to play this game.

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Appendix A

Example draft email seeking an invitation to speak briefly about OER.

Subject: Requesting a few moments to introduce Open Educational Resources

Dear Dr. Smith,

I'm sending you this email to request a few moments during an upcoming department meeting to discuss Open Educational Resources (OER). Creative Commons defines OER as teaching, learning, and research materials that are either (a) in the public domain or (b) licensed in a manner that provides everyone with free and perpetual permission to engage in the 5R activities: retaining, remixing, revising, reusing, and redistributing the resources.

I would like to share the basics of OERs with you and your colleagues and invite those interested to schedule one on one consultations with me as a follow up. Please share any thoughts and concerns you have, or simply send me a date, time, and location when you have room in your meeting schedule.

Sincerely,

OER Promoting Librarian

Appendix B

Rohrbach Library OER Support Request Form

Rohrbach Library OER Support Request

I'm interested in:

☐ Learning more about Open Educational Resources [OER]

☐ Seeing what OER are avaialble for my courses or in my field

☐ Finding out about OER efficacy

☐ An OER presentation for my department or group

☐ Creating OER

☐ Other

My experience level with OER is:

☐ I am not familiar with OER

☐ I have heard a little bit about OER

☐ I know about OER but have not used them

☐ I am using OER now or have used them in the past

☐ I have created OER

At this point in time:

◯ I am considering a shift to OER

◯ I have too much going on, but would consider looking at OER in the future

◯ I am not considering OER

Please share any questions, thoughts or concerns about OER

Enter your name and email address and I will reach out to you to set up a consultation time.

Name:

Email:

Submit

Appendix C

OER Consultation Worksheet Example

OER Consultation

Initial contact:	OER Support Request form on 10/2
I'm interested in:	Learning more about OER. Seeing what OER are available for my courses or in my field. Finding out about OER efficacy.
Experience:	I have heard a little bit about OER I know about OER but have not used them.
At this point in time:	I am considering a shift to OER.
Follow up notes:	Met via zoom on 10/8. Sent resources below via email on 10/8. Awaiting feedback.
Name:	Dr. Professor
Email:	professor@uni.edu
Concepts:	Spanish for Heritage Learners, Pop Culture

Recommendations

Source:	Ohio State OER
Type:	OER Textbook
Title:	[Mi idioma, mi comunidad: español para bilingües](bit.ly/3peU3jG) (bit.ly/3peU3jG)
Notes:	This is an open-access textbook for Heritage Language Leaners of Spanish that centers on students' experiences with language, identity, and belonging in the Midwest through real-world applications. It uses a project-based approach that outlines how students engage in real-life applications by exploring culturally relevant topics in language use, arts, festivals, food, ethnography, oral history, digital lives, and the university. Through multimedia such as podcasts, videos, neighborhood maps, and music, we promote interactive exploration of culturally relevant content while supporting students' language maintenance and growth. Good: It incorporates YouTube videos. Chapter 2 includes material on both the Mexican & Puerto Rican neighborhoods of Chicago. Bad: It carries a no derivatives CC license, so you could use it, but not modify it to fit your needs.
Source:	Rohrbach Library
Type:	eBook
Title:	[Community Service-Learning for Spanish Heritage Learners: Making Connections and Building Identities](bit.ly/2I9EQ2F) (bit.ly/2I9EQ2F)
Notes:	Author Kelly Lowther Pereira taught Spanish Heritage Learner courses which incorporate Community Service Leaning at UNC. Unlimited user license. Perhaps a resource for instructors, probably not students.
Source:	Rohrbach Library
Type:	eBook
Title:	[Advances in Spanish as a Heritage Language](bit.ly/32rsc5U) (bit.ly/32rsc5U)
Notes:	Editor is Diego Pascual y Cabo. Unlimited user license. Again, a book about teaching, so maybe not for students.
Source:	UCLA & The National Heritage Language Resource Center
Type:	Journal

Title:	Heritage Language Journal (hlj.ucla.edu)
Notes:	An online blind-refereed journal dedicated to the issues underlying the teaching and learning of heritage languages. Not focused specifically on Spanish, but searchable.
Source:	Internet
Type:	Periodical Index
Title:	Latindex (bit.ly/3keuN9A)
Notes:	Search for journals from Latin America, the Caribbean, Spain and Portugal. Search by country, subject, region, etc.
Source:	Rohrbach Library
Type:	Journal
Title:	Studies in Latin American Popular Culture (bit.ly/3qtU3wD)
Notes:	One-year embargo on new articles. We could get embargoed articles via Interlibrary loan.
Source:	CUNY
Type:	Syllabus & Open Course Site
Title:	CUNY Spanish for Heritage Speakers Course Taught Fall 2019 (bit.ly/3kfWGha)
Notes:	Author/Instructor is David Sanchez-Jimenez (dsanchezjimenez@citytech.cuny.edu). This intermediate course (bit.ly/35evD1F) is intended for students who were immersed in or exposed to the language while growing up, but who have received little or no formal instruction in Spanish. As it is delivered at CUNY, I'm hopeful it includes more "east coast" culturally relevant resources. Site content carries a Creative Commons Attribution, NonCommercial License, allowing you to use it however you would like, as long as you attribute the original author and don't make any money from it. I would be glad to contact Dr. Sanchez Jimenez to see what OER text he used for the course or to ask any other questions you might have, if you would like me to.