

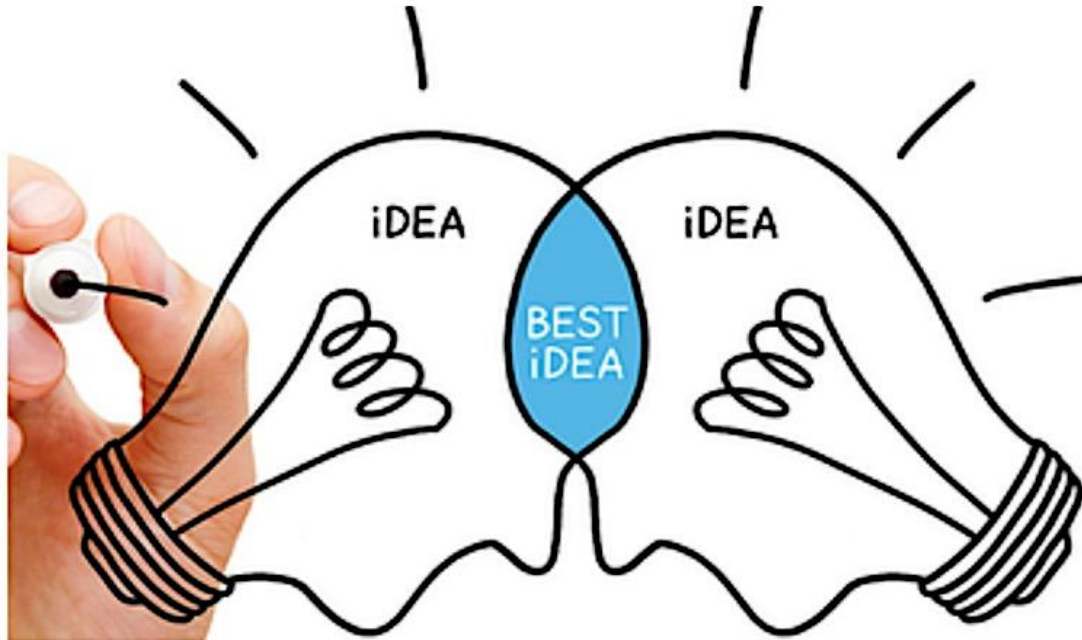
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Advancing an Open Educational Resource Initiative through Collaborative Leadership

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Abstract

In its examination of initial stages of OER implementation at a mid-size public research institution, this article discusses the collaborative leadership practices developed by the Senior Director of Information Technology and Reference and Instruction Librarian as initiators and co-chairs of the campus OER working group. Key to this grassroots effort is the collaborative engagement of stakeholders across campus to increase awareness and use of OER to advance institutional adoption and long-term sustainability. Given that OER labor is often uncompensated and voluntary, it is critically important to highlight the hidden labor of academic support staff and librarians on campus who are often ignored in discussions of the need for faculty incentives, recognition, and compensation. In its discussion of change management, strategic planning, and OER labor inequity, this

article illuminates practical processes for establishing a transparent, flexible, and collaborative workflow in advancing an initial OER movement on campus.

Keywords: open educational resources, OER, change management, invisible labor, strategic planning

Introduction

What are the best practices in collaborative leadership for open educational resource (OER) initiatives within higher education? While the literature on OER implementation often emphasizes the importance of garnering support from numerous key stakeholders on campus, there can be an absence of dialogue about the work required in the critical first stages of teambuilding and establishing an OER working group. Although traditional roles for librarians typically include OER advocacy and resource searching, designated OER leadership positions for librarians have not always been considered (Braddlee & VanScoy, 2019). Similarly, the OER-related work provided by academic support staff can often be unnamed and hidden within the OER teams that perform the critical work of open course adoption and advancement within institutions (Hanley & Bonilla, 2016). While both top-down institutional support and advocacy at the ground level are necessary for sustainable OER adoption, the authors discuss first steps that can be taken to energize a campus and spur institutional awareness and commitment to the open educational cause.

The collaborative OER effort took place at the University of Maryland Baltimore County (UMBC), a public research university with an enrollment of 11,060 are undergraduate and 2,540 graduate students. The suburban campus is located about five miles from downtown Baltimore and draws enrollments from both U.S. and international

students. Just over 70% of undergraduate students live on campus, while the remaining students commute (UMBC, n.d.-a). The university champions both student academic success and social justice in its mission to “redefine excellence in higher education through an inclusive culture ... [and] advance knowledge, economic prosperity, and social justice by welcoming and inspiring inquisitive minds from all backgrounds” (UMBC, n.d.-b).

Since 2013, a division of the state university system has spearheaded a statewide OER initiative, the goal of which is to provide support in scaling the adoption of OER by public and private university and community college institutions across Maryland (University of Maryland System William E. Kirwan Center for Academic Innovation, n.d.-a). While the use of OER often results in reduced student costs, OER is also of interest because of the documented positive increase in student grades and lowered rates of D, F, and withdrawal letter grades (Colvard, Watson, & Park, 2018). While there have been impressive developments in OER at other institutions in the state, a centralized OER effort did not exist at UMBC until the spring of 2019, when a Reference and Instruction Librarian and Senior Director of Instructional Technology (IT) co-initiated a grassroots OER working group on campus.

In the absence of OER institutional leadership at UMBC, the OER co-chairs faced the challenge of building an initiative from the ground up. Recognizing that greater awareness of OER on all levels is needed in order to influence institutional leadership support, two major purposes of the OER initiative were identified: namely, to 1) to inform and educate faculty, students, staff, and administrators about the possible impact of OER adoption and 2) to identify and implement processes and practices to facilitate

the sustainable adoption of OER at the institution. Given that the working group is comprised of faculty and staff representing the Humanities and STEM, Library, Faculty Development Center, and Information Technology departments, all with primary job responsibilities in their respective departments, the co-chairs recognized a critical need to establish a structured yet flexible working framework for the group. Drawing upon the literature of change management, strategic planning, and labor inequity in higher education, this article examines collaborative leadership practices that are helpful for engaging and galvanizing a diverse team of library, information technology, and faculty professionals in OER awareness and implementation on campus.

Literature Review

The growth of the OER movement marks an increasing interest in “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” (UNESCO, 2002). Emphasis on open licensing in the OER community has resulted in widespread adoption of five licensing rights that have been coined as the “five R’s” (retain, reuse, revise, remix, and redistribute), allowing faculty to tailor the materials for their classes and spurring greater innovation and collaboration in teaching and learning (Jhangiani, 2019; Sterling Brasley, 2018, p. 27; Wiley, 2014). The majority of OER research for the last several decades has focused on student and faculty perceptions of OER and the analysis of cost-savings and financial benefits (Belikov & Bodily, 2016; Colson, Scott, & Donaldson, 2017; Hilton, 2018; Seaman & Seaman, 2018). Recently, there has been a focus on the relationship of OER use and increases in student GPA, retention rates, and graduation rates.

In a survey conducted by the Florida Virtual Campus in 2018, some students indicated that textbook costs have caused them to choose not to purchase a textbook, even at the expense of earning lower grades. Such studies have further inspired OER advocates to center the OER movement on student success (Florida Virtual Campus, 2019; Jhangiani, 2019). At the University of Georgia, researchers found that the use of OER in the classroom led to increased academic performance for all students, with the greatest increase for traditionally underserved students, such as non-white, part-time, and Pell Grant recipients (Colvard, Watson, & Park, 2018). Such research highlights the potential of OER to advance more equitable learning in higher education. More recent movements within the OER community have emphasized the overall ethos of Open Pedagogy and the potential of OER to transform teaching into a more student-centered practice where students are viewed as collaborators and creators in their own right (Jhangiani, 2019; Yano & Myers, 2018).

In addition to research findings on perceptions of OER, the impact of OER adoption on student success measures, and the turn to open pedagogy, the OER literature is replete with action-oriented case studies detailing both statewide (Bell & Salem, 2017; Frank & Gallaway, 2018; Hanley & Bonilla, 2016), and institution-specific adoption efforts (Blick & Marcus, 2017; Davis, Cochran, Fagerheim, & Thoms, 2016; Ives & Pringle, 2013; Wesolek, Lashley, Langley, 2018; Woodward, 2017). Such case studies illustrate the wide variety of OER models in terms of team composition, workflow, and the extent of top-down versus bottom-up leadership. Awareness of strategic planning models and discussions of change management assisted the authors' efforts in initiating

the first OER working group at their institution. Broad concepts can be taken and applied to local needs and institutional context.

Change management and higher education In a recent dissertation on faculty adoption of OER, Sterling Brasley drew upon several prominent change management theories, including Rogers' (2003) diffusion of innovation model. Writing from a sociological perspective, Rogers described how innovations gain greater acceptance as they are increasingly shared by members of a particular social group (as cited in Sterling Brasley, 2018, pp. 19-37). In their discussion of OER adoption, Braddlee and VanScoy (2019) stated that OER has not yet crossed the needed diffusion threshold of a 16% adoption rate in order to influence more widespread acceptance. However, it is clear that faculty awareness of OER is increasing across the nation. The 2018 Babson Survey Research Group reported that "46 percent of faculty [are] now aware of open educational resources, up from 34 percent three years ago" (Seaman & Seaman, 2018). While OER awareness is necessary on a national scale, greater awareness and adoption needs to take place at institutional levels as well (Braddlee & VanScoy, 2019, p. 2). Sterling Brasley (2018) also drew upon the change management theory developed by Anderson and Anderson (2010), which focused on both internal and external "drivers of change" at the individual and organizational levels (as cited in Sterling Brasley, 2018, pp. 39-40). In order for the widespread adoption of OER to take place, there needs to be both diffusion through social channels and a supportive external environment. For example, as individual faculty members adopt and recommend OER to their peers, the use of OER will likely gain greater acceptance on campus. Likewise, as institutional resources are

allocated to OER programs, faculty and support staff will be better positioned to advance OER adoption.

In their influential article on innovation in higher education, Christensen and Eyring (2012) described the disruption of digital learning innovations in traditional classroom university instruction. While they do not address OER specifically in their article, they highlight the necessity of cultivating an environment to incentivize and support faculty in adopting innovative teaching and scholarship practices. They state that “no meaningful discussion of change can be undertaken without assurances ... of supportive success measures” (Christensen & Eyring, 2012, p. 52). In other words, in order for large-scale change to take place, there needs to be a support network in place to minimize risks and to lead the way in a substantial change. In the case of OER adoption, having a team in place to support the selection, revision, adoption, and assessment of OER efforts can help ameliorate anxieties stemming from changes that innovation brings.

Strategic planning and OER As documented in discussions of change management, institutional commitment to OER adoption takes time and a significant amount of resources. Because OER intersects with many departments and centers on campus, stakeholders can include faculty, staff, and administrators from the Library, IT Services, Teaching and Learning Center, campus bookstore, Academic Success Center, Provost and Dean’s offices, Faculty Senate, the Office of Institutional Advancement, and other campus centers (Cummings-Sauls, Ruen, Beaubien, & Smith, 2018; Doan, 2017; Ivie & Ellis, 2018; Reed & Jahre, 2019). In addition, campus attitudes towards OER may vary greatly from institution to institution depending on whether there is top-down

support for OER, or whether interest is initiated from a grassroots campaign (Amaral, 2018; Dean, 2018; Hanley & Bonilla, 2016; Rolfe & Fowler, 2012; Stagg et al., 2018). How can strategic planning help account for these variables and advance the work of local OER initiatives?

While not as extensive as scholarship on OER perceptions and implementation, the literature on OER strategic planning and leadership practices offers valuable direction for those launching a new OER initiative and for those seeking greater structure and vision (Judith & Bull, 2016; Jung, Bauer, & Heaps, 2017b; Reed & Jahre, 2019; Role & Fowler, 2012; Shu-Hsiang, Jaitip, & Ana, 2015; Walz, 2015). In their discussion of OER implementation, Judith and Bull (2016) presented four different models along a continuum of scale, including 1) individual, 2) programmatic, 3) institutional, and 4) networks. They emphasize how risks and efficiencies operate differently in each of the models. For example, when individual faculty members adopt OER for class use, they will likely experience greater freedom, greater risk, and less efficiency in the process. On the other end of the spectrum, the institutional and networked levels offer more controls (less freedom), while also granting greater efficiencies and economies of scale. Judith and Bull did not advocate for a particular model over another, but rather argued that the relative strengths and weaknesses should be taken into consideration when launching an OER initiative. It is likely that several of these models would need to operate simultaneously for an OER initiative to build momentum and become part of the fabric of an institution. Faculty who are currently using OER materials in their classrooms can be invited to help spread awareness of campus OER programs at the institutional level.

Statewide resources can be used to help bring greater efficiency to the work at an individual campus.

Furthermore, it is valuable to conceptualize the project of OER adoption as a series of smaller, strategic initiatives along the path of OER implementation. Organizing an OER workshop or securing a large-enrollment course for a pilot study are distinct projects that contribute to the greater vision of large-scale institutional support. The process of adopting OER in a single class requires planning, preparation, and assessment, just as a long-term OER implementation project would. A five-step lifecycle for assessing, analyzing and finding, reviewing, redesigning and adopting, implementing, and evaluating OER programs presented by Walz (2015, pp. 27-28) helps outline critical stages of OER planning and adoption. It is crucial that OER strategic planning take place in the short- and long-term and at both individual and institutional levels.

In their depiction of OER strategic planning, Jung et al. (2017b) presented an “OER implementation model” that has proven to be a helpful guide for the authors’ development of a working OER group from the ground up at UMBC. The five stages described include: 1) the analysis phase, 2) the adoption phase, 3) the optimization phase, 4) the evaluation phase, and 5) the stabilization phase. Each phase outlines specific action items and priorities. For example, the *analysis phase* is comprised of a set of 10 priorities, including determining a mission and vision for the OER initiative, “[e]stablishing an OER initiative task force,” outlining a time frame, and taking stock of the resources and partners needed (p. 79). The *adoption phase* then moves from the planning stage to milestones, such as developing a project budget, implementing an OER pilot study, and assimilating OER into the learning management system used on campus. Further

optimization, evaluation, and stabilization phases resolve the work needed to secure OER implementation in the long-term (pp. 80-82). This practical, action-oriented framework proved extremely useful in helping the authors conceptualize both the long-term vision and the immediate tasks needed to initiate a successful OER collaboration.

Collaborative leadership, invisible labor, and OER Attempting to advance an OER initiative can feel overwhelming in the face of a lengthy list of action items and responsibilities. While challenges, such as the lack of funding, expertise, time to select and create materials, and the lack of institutional buy-in, have been well documented in the literature (Annand & Jensen, 2017; Belikov & Bodily, 2016; Hanley & Bonilla, 2016; McGowan, 2019; Rolfe & Fowler, 2012; Taylor & Taylor, 2018), there is a critical need to examine these challenges through the lens of labor inequities in OER efforts. While the literature addresses the need for adequate incentives for faculty adopting OER, such as recognition for OER teaching and scholarship in the promotion and tenure process (Annand & Jensen, 2017; Doan, 2017; Taylor & Taylor, 2018; Walz, 2015), greater awareness and research is needed to document the labor of individuals working in what are often considered “academic support roles” on campus, such as librarians, instructional designers, and IT staff.

The rising reliance on the labor of adjunct faculty, graduate student, and contract lecturers—many of whom are on the front lines teaching the high enrollment courses crucial to OER adoption and success—add to the increasing precarity of labor. Hourly wage structures rather than salaries can certainly complicate how or whether the extra work required to adopt OER is even compensated (Crissinger, 2015). Given that the use of OER has shown to increase student academic achievement, the case for OER adoption

is a compelling one for libraries and academic support centers. However, the virtue of the OER cause should not be weaponized against those doing the necessary, yet largely unacknowledged day-to-day work required to support an OER program.

In OER, as in library work, “vocational awe,” or an ethos of self-sacrifice can come at a high cost of unsustainability and burnout (Fobazi, 2018). As Hanley and Bonilla (2016) wrote, it is important to recognize that “behind every free textbook lays a frequently invisible economy of labor and resources” (p. 139). In articles written by both librarian and non-librarian scholars, librarians are sometimes cast as reliable supports that can step in and rescue overburdened faculty by providing time-intensive labor to make possible the selection or development of OER materials, without considering the existing workloads of the librarians (Belikov & Bodily, 2016; Crozier, 2018; Davis et al., 2016; Goodsett, Loomis, & Miles, 2016). Libraries are sometimes designated as the main stage for the OER rollout, whether through an affordable textbook program or OER initiative, all of which require vast amounts of financial support, training, and additions to already-stretched library resources (Bell & Salem, 2017; Reed & Jahre, 2019; Salem, 2017; Smith & Lee, 2017). At many institutions, however, the critical support that librarians provide is completely unrecognized. Bell (2018) found that faculty rarely consider turning to librarians for OER assistance. Braddlee and VanScoy (2019) described how faculty frequently value the OER assistance provided by librarians, but do not think of them as OER leaders. Not only is OER labor often invisible, but it can also be devalued.

It is vital that the work of librarians, instructional designers, IT professionals, adjuncts, and other marginalized laborers on campus is not made invisible and shuffled off in unnamed OER support teams. As Thomas (2018) wrote in a recent post, the “lack

of awareness of the work that goes into open advocacy can be an obstacle to translating its value into traditional measures or objectives.” Recognition and resources should be granted to everyone involved in an OER project. As two recent Rebus Community office hour discussions on combating invisible labor demonstrated, greater awareness and attention is beginning to be paid to this issue, which needs to increase as OER efforts continue (Rebus Community, 2019; Rebus Foundation, 2019). Care should be taken to respect and honor workloads of the individuals serving on a collaborative committee, keeping in mind that in many cases the work is voluntary and often not directly included in job descriptions.

While studies of change management and strategic planning outline priorities and support needed to advance innovation within higher education, it is crucial that OER workflows and processes are made visible and the responsibilities shared. While OER certainly lowers costs for students, it requires significant financial and personnel investment at the institutional level. The allocation of sufficient resources is critical in making the transition from an ad hoc grassroots campaign to a fully sustainable OER institutional program. This need for funding and resources should be fully articulated to campus leaders and decision-makers (Grayson, 2019; Hanley & Bonilla, 2016; Rolfe & Fowler, 2012). What follows is a discussion of the authors’ experience in navigating power inequities while working to establish a collaborative OER working group on campus.

Case Study

Like many collaborations, the impetus for an OER initiative at the University of Maryland Baltimore County was started by a conversation that took place between the

Senior Director of Instructional Technology (IT) and a Reference and Instruction Librarian in the spring of 2019. Both the IT director and librarian were aware of regional and state OER initiatives and were eager to advance the financial and academic benefits of OER for the students at their university. Prior to their meeting, the librarian had discovered a lack of OER training resources and support for faculty and staff and had prepared an online OER LibGuide and materials for an OER workshop in March 2019 (Durham, n.d.). In her efforts to advertise the workshop more broadly across campus, she reached out to the IT director for assistance in getting the word out. In the course of this initial email conversation, the IT director invited the librarian to participate in the upcoming campus TechFest symposium organized by the IT division on campus. This allowed for two initial outreach opportunities—a library-sponsored OER workshop and the IT TechFest symposium. Both events proved useful in identifying faculty members and staff who were interested in OER at UMBC.

Following the workshop and TechFest events, the librarian and IT director recognized the need to take a more strategic approach to organize campus efforts related to OER. They set up an initial one-on-one meeting in April 2019 to discuss how to bring representatives from various campus stakeholder groups together to form an OER working group. During the meeting, the IT director and librarian discussed the overall purpose of the group. Rather than focusing merely on textbook affordability, they determined the need to highlight OER as a path to increasing student academic success and advancing innovative teaching and learning on campus, thus tapping into the national emphasis on the relationship of OER to student success (Colvard, Watson, & Park, 2018) and open pedagogy (Jhangiani, 2019).

As they grappled with the task of building an initiative from the ground up, the librarian and IT director found descriptions of OER implementation and strategic planning that were useful in providing a foundational framework. During their first meeting in April, they discussed how their work fit with the *analysis phase* as discussed by Jung et al. (2017b). As they referred to the action items in the *analysis phase*, the librarian and IT director worked to align the purpose of the group with UMBC's Mission and Vision, organize communication and record-keeping processes, and identify key stakeholders and invite them to join the OER initiative.

Both the IT director and librarian were aware and concerned about the lack of initial institutional support, and recognized that the work would be entirely voluntary. They discussed fears of overburdening themselves and members of the working group and addressed strategies to mitigate the strains of taking on such labor-intensive work. To this end, the IT director and librarian set up the OER working group to function as a collaborative team, with shared leadership responsibilities in their roles as co-chairs of the group. They realized that setting forth a central mission and vision, establishing transparent communication channels, sharing documents, and setting up collaborative task assignments would be vital to the success of the working group. While there would need to be a substantial investment of time in their role as co-chairs, especially during the critical initial phase of establishing the group, the authors also recognized that the summer months were more conducive to allowing for a greater investment of time outside of the busy fall and spring semesters. They identified priorities of the working group, including the importance of educating faculty, students, and staff about the possible impact of OER adoption, and identifying and implementing processes and

practices to facilitate the adoption of OER at UMBC. In this way, the co-chairs positioned the working group as a means to build awareness of OER at the individual and department levels to work towards the goal of securing more sustainable OER adoption and top-down leadership, funding, and support.

Following this initial meeting in April, the co-chairs reached out directly to invite representatives from the following institutional offices and academic departments: the Faculty Development Center, STEM and Humanities faculty, and Division of Information Technology. Potential members were identified from the list of attendees from the library OER workshop held earlier that spring. The IT director also met with the Vice President of Information Technology to secure higher-level leadership support for the initiative. The co-chairs soon recognized the need for student representation, and as a result, invited a recent graduate working in the IT department to join the group.

During this period, the statewide OER initiative managers sent an invitation to campus leaders at all the universities and community colleges to select a team of OER leaders to serve as representatives for the upcoming 2019 OER State Summit (University of Maryland System William E. Kirwan Center for Academic Innovation, n.d.-a). The IT director helped recommend OER leaders for the summit team, which included two instructional designers from the IT department, the Reference and Instruction Librarian co-chair, and a staff member from Disability Services. By attending the event, these campus representatives learned about several state-level OER initiatives and resources available to them. These representatives also served as a base of support in the months following the summit to help advance the newly initiated OER work at the local level.

As the co-chairs prepared for the inaugural OER working group meeting on campus, they drafted the mission, purpose, and initial priorities of the group and decided on logistical strategies the group would use for meeting organization, communication, and record-keeping. Meeting participation would be possible through either face-to-face or virtual attendance. Schedules, shared documents, and records would be achieved via Google applications. The co-chairs identified a set of action items the working group could prioritize as short-term projects and goals. These initiatives included faculty outreach and education by way of participating in the annual Provost's Teaching and Learning Symposium, providing a one-day OER introduction as part of a week-long program offered by the Office of Instructional Technology, and offering a range of OER professional development options including workshop and lunchtime discussions. Longer-term goals were identified such as building a larger OER community group open to all interested faculty, conducting an OER pilot study in a high-enrollment course, and working on establishing a no- or low-cost course designator in the registrar's course schedule.

By June, the co-chairs established the initial membership of the working group and scheduled the group's first meeting. As a result of the inaugural meeting and subsequent email communications, the working group members finalized their mission statement, solidified the short-term project list for Fall 2019 with group members volunteering to collaborate on the various action items, and outlined a roadmap and vision for the long-term. Several short-term projects were initiated in August. Those projects included establishing an OER communication group within the campus web portal, surveying the faculty to determine current use of and interest in OER,

participating in the Provost's Teaching & Learning Symposium in September, and planning activities focusing on OER during National Distance Learning Week in November. The university web portal, myUMBC, enables various administrative offices, academic programs, clubs, and interest groups to share and posts, events, and other information with the university community. The portal provides the ability to disseminate materials and inform the campus stakeholders of activities and upcoming initiatives in which they may want to participate. The working group created a subcommittee charged with establishing and populating the OER discussion group within the university portal. Thus far, the portal has been used to announce upcoming OER webinars and workshop events at the state and institutional levels, such as the OER Lunchtime Roundtable event in November during National Distance Learning Week.

To gain a greater understanding of the level of faculty awareness and use of OER at UMBC, the OER working group prepared a survey of 15 branched questions using the Qualtrics platform (see Appendix for survey questions). Questions were collaboratively drafted and revised using a shared Qualtrics group project, and then distributed via email by the Director of the Faculty Development Center, also a member of the OER working group. The director sent out the survey the week prior to the start of the fall semester, and once again during the third week of the semester. The survey included questions such as "What challenges do you face or anticipate regarding OER adoption?" and "How would you rate your awareness/use of OER?" As of October 15, 2019, the working group has received 104 faculty responses from the survey, which represents about a 12.5% response rate from the total population of about 830 full and part-time instructional faculty on campus (University of Maryland Baltimore County, n.d.-a).

The survey results provide a snapshot of faculty awareness and use of OER as it currently stands across a wide range of departments and disciplines at UMBC. While information-gathering regarding faculty awareness needs to be ongoing, the survey provides insight into the level of OER involvement at UMBC within the first six months of the initiation of the campus OER working group. The survey responses indicate that there is an interest in OER professional development events and programs on campus. When prompted at the end of the survey to include their contact information to learn of OER resources, events, and grants, 69 respondents did so. This is an indication that a number of faculty may be willing to become more involved in OER programs and possible adoption initiatives in the future. Given Rogers' (2003) diffusion model that a significant portion of adopters is required to bring about change (as cited in Sterling Brasley, 2018, pp. 19-37), the number of faculty who expressed an interest in potentially participating in future OER events is promising. As the OER working group members move forward with plans for an OER lunchtime panel event during the November National Distance Learning Week, they will specifically reach out to faculty who expressed interest and invite them to participate. As OER events and programs are planned and presented in the coming year, it is hoped and anticipated that levels of awareness and involvement will increase among UMBC faculty.

Results from the faculty OER survey were shared in part during a poster presentation at the UMBC Provost's Teaching and Learning Symposium held in September 2019. Three members of the OER working group shared their poster presentation, "Access & equity: What can OERs do for your students?" to introduce faculty to OER and its connection to improved student learning and graduation rates

(Durham, E., Braxton, S., Biro, S., Manni, M., 2019). The poster included results from the UMBC faculty survey to illustrate levels of current faculty awareness and use of OER (see Figures 1 and 2). At the time of the poster presentation in September, 97 faculty had participated in the OER survey. In response to the question, “How would you rate your awareness/use of OER? (Select all that apply),” 44 respondents indicated that they had never used OER before, while 23 stated that they had selected OER for use in a class (see Figure 1).

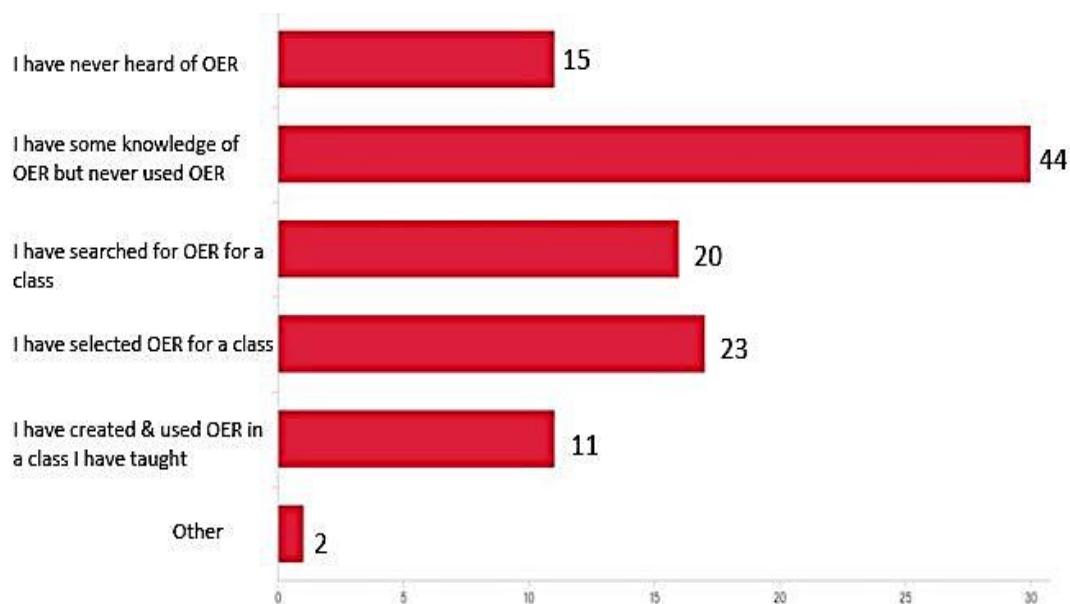


Figure 1. Survey Question 5. Q5: How would you rate your awareness/use of OER? (Select all that apply). Out of 97 responses as of September 19, 2019.

☐ I have not used or searched for OER materials

☐ I have searched for OER materials to use in a class

☐ I have included supplementary OER materials in a course

☐ I have adopted an OER textbook/ other materials as the main content in a course

☐ I have revised/adapted PER content to tailor to my class needs

☐ I have created OER materials for use in my class

☐ I have created OER materials and shared on an OER forum/repository

☐ Other

Figure 2. Survey Question 7. Q7: In what ways have you used OER materials in your courses at UMBC? (Select all that apply). Out of 97 responses as of September 19, 2019.

In addition to sharing survey results, the presenters announced the launch of the OER working group on campus and shared how faculty could get involved by joining the OER web portal and attending the OER lunchtime roundtable during National Distance Learning Week.

Annually on campus, the Office of Instructional Technology recognizes National Distance Learning Week, an opportunity to highlight best practices in distance learning, with programming that focuses on providing sessions on topics related to online teaching and learning. As part of this year's activities, the department will sponsor two sessions focusing on OER. A lunchtime roundtable will include a panel comprised of faculty currently using OER, a member of the OER working group, and the director of the University of Maryland's Center for Academic Innovation (University of Maryland System William E. Kirwan Center for Academic Innovation, n.d.-b). A second session

will feature representatives from the Maryland Open Source Textbook (M.O.S.T.) Commons, a digital library of open education resources (M.O.S.T. Commons, n.d.). Faculty will not only have the opportunity to hear about lessons learned from their colleagues, but they will also be introduced to the latest OER support and resources in the state of Maryland.

Additionally, the OER working group is planning to host a faculty OER Lunch and Learn event in March 2020. While past Lunch and Learn events have helped familiarize faculty with new educational technologies, this will be the first to feature OER. As the OER working group members move forward with plans for an OER roundtable event during the November National Distance Learning Week and a Lunch and Learn event next spring, they will specifically reach out to invite the faculty members who in the OER survey expressed an interest in learning more about OER. As OER events and programs are planned and presented in the coming year, it is hoped and anticipated that levels of awareness and involvement will increase among UMBC faculty.

Challenges

The initial steps and successes were not accomplished without challenges and opposition. Engaging stakeholders from within the institution who have varying motivations, goals, interests, and personalities requires clear identification of the value proposition for each participant. This is especially true when convening an all-volunteer working group with no formally established mandate from the institution. Thus, it is imperative to provide flexibility in scheduling meetings and identifying milestones as the

work moves forward. Providing ways to contribute both virtually and asynchronously allows the group's members to contribute when and where they are able to find the time.

Recognizing that not all faculty are currently open or willing to consider OER adoption, the co-chairs follow a mantra of working with those who are interested in participating and using that energy to build broader interest and support. This applies to both faculty and academic leadership within the institution. Having the support of mid-level institutional cabinet members as well as Vice Provosts and Deans is essential to gaining greater traction (Rolfe & Fowler, 2012). Additionally, identifying early adopters and faculty champions who can act as ambassadors is a strategic approach in this effort. To that end, faculty members from key academic departments were identified and serve as members of this working group.

Beyond the working group, this OER initiative faces challenges related to traditional institutional protocols and figurative "walls" that impede the forward momentum of this work. The lack of incentives for tenured and tenure-track faculty to participate in this type of academic transformation, especially if it is not in conjunction with their research focus, continues to be a challenge. Additionally, the lack of support, incentives, and motivation provided to non-tenure track faculty, historically most often those faculty involved in the early adoption of innovative pedagogical approaches, stifles the progression of these efforts. For example, in one instance, the co-chairs served as advocates for a part-time, non-tenure track faculty to make it possible for him to receive financial support to participate in an OER creation and adoption grant program when the traditional institutional protocols stymied his participation. Identifying ways to simplify compensation processes will be one of the topics the working group will need to address.

Finally, the invisible labor required to develop and sustain this work is unaccounted for in these initial stages. Volunteerism has been the foundation of the group's work to date; future expansion will require a more formalized support structure that includes the incorporation of the shared governance model of the institution.

Recommendations

As the co-chairs have worked to develop a collaborative OER initiative on campus, they found that transparent, flexible, and scalable processes that provide mutual benefits have been key to the endeavor. In addition, maintaining awareness of bandwidth and labor capacities has helped moderate the workflow and pacing. These values permeate the work at two levels, both in the shared responsibilities of the co-chairs and in collaboration with the working group as a whole.

Shared communication and planning platforms have cultivated transparency within the group. As part of the initial kick-off meeting, the co-chairs created a Google Drive with shared folders and a group calendar. Action items were listed on an editable group spreadsheet, which allowed group members to see and volunteer for tasks and to brainstorm additional tasks of interest. The initial group meeting times were determined based on feedback from a Doodle poll, and periodic meetings and email updates have allowed for shared communication with the group.

Understanding the many competing demands for time, the authors also prioritized flexible options for participating in the group. A virtual conference link was sent out to all group members for the first meeting and was embedded as a permanent option for all future group meetings. Knowing that there has been some resistance from some sectors of the campus community, the co-chairs moved forward first in working with those who are

actively invested in advancing OER and using that energy to build greater interest and support within the wider campus.

Considering the different strengths and interests of the group members has helped prioritize initiatives with mutual benefits. As the co-chairs considered the significant time and labor investment needed to facilitate OER adoption within a single course, they realized the importance of working with faculty members who are already invested in adopting OER. Rather than being a burden, the OER project then becomes beneficial both to the faculty member and the greater OER initiative. For example, when the state OER grant awardee met with resistance at the institutional level, the co-chairs reached out to the state level to resolve the conflict, thus allowing his OER implementation to move forward for his fall course.

Scalability has been of critical importance throughout the creation of the campus OER initiative. Some practical strategies have included selecting a few top priorities for the upcoming semester from the action item spreadsheet. Tasks more suited for future work have been slated for future start dates, ensuring that the workload is reasonable for the capacity of the working group. By inviting collaboration on concrete action items, the authors work to facilitate the buy-in of all group members. In addition, state resources are utilized when possible to help streamline efforts at the local level.

To further scale the OER initiative, the group aligned tasks with scheduled campus events as a way to embed OER efforts into ongoing campus structures. For example, rather than planning an OER training program as an entirely separate event, the working group chose to schedule the OER panel presentation during the National Distance Learning Week events organized by the instructional technology team on campus. This reduces labor by

allowing the group to tap into the advertising and planning efforts of the larger event. It also increases the potential for reaching a larger, more diverse audience of faculty, some of whom may already have an interest in OER and others for whom it may be a first-time introduction to open education.

Conclusions and future directions

Rather than take on more tasks than would be possible in the beginning, the co-chairs prioritized two major purposes for the working group, that of first informing and educating faculty, staff, and administrators about the academic and financial benefits of OER, and second, that of establishing processes and practices to facilitate the adoption of OER on campus. These goals, however, are not intended as an end in themselves, but rather as catalysts for realizing sustained institutional adoption in the future. By mapping out both short-term goals and a long-term vision, the working group is actively taking steps to complete the first *analysis phase* (Jung et al., 2017b) of OER implementation and set a course for institutional adoption. Given the considerable investment of time and labor to implement an OER initiative from the ground up, it is vital to make visible the hidden labor of academic support personnel on campus. As the OER initiative continues to mature, the co-chairs are committed to working to identify and break down institutional barriers by introducing measures that would secure resources and recognition to all OER adopters on campus, regardless of faculty or staff status.

By centering the priorities of the OER initiative on building awareness of OER and capacity for adoption, the members of the OER working group seek an end goal of long-term sustainability and the buy-in of high levels of campus leadership. By embedding OER within already existing campus structures and by utilizing state resources when possible, the working group is working to achieve a greater reach than

would be possible on their own as they advance academic student success and the commitment to social justice on campus.

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Appendix

UMBC Faculty OER Survey

Start of Block: General Questions

This brief, 15 question survey should take less than 10 minutes to complete. Thank you very much for sharing your feedback on Open Educational Resources (OER).

Sincerely,
The OER Working Group at UMBC

Q1 What is your department?

Q2 Select what best describes your job position (Select all that apply):

- ☐ Tenure track (1)
- ☐ Adjunct faculty (2)
- ☐ Lecture/Contract (3)
- ☐ Full-time (4)
- ☐ Part-time (5)
- ☐ Library faculty (9)
- ☐ Staff (10)

Q3 What kind of teaching have you provided during your time at UMBC? (Select all that apply):

- ☐ Online or distance learning (1)
- ☐ Hybrid or blended teaching (2)
- ☐ Face-to-face teaching (3)

Q4 Open Educational Resource (OER) Definition

Open educational resources are “teaching, learning or research materials that are in the public domain or released with intellectual property licenses [such as Creative Commons licenses] that facilitate the free use, adaptation and distribution of resources.”

—UNESCO, 2002

Q5 How would you rate your awareness/use of OER? (Select all that apply)

- ☐ I have never heard of OER (1)
- ☐ I have some knowledge of OER, but I have never used OER (2)
- ☐ I have searched for OER materials for a class I have taught (3)
- ☐ I have selected OER materials for a class I have taught (4)
- ☐ I have created and used OER content for a class I have taught (5)
- ☐ Other (6) _____

Skip To: Q9 If How would you rate your awareness/use of OER? (Select all that apply) =
I have never heard of OER

Q6 Where have you heard about OER before? (Select all that apply)

- ☐ Colleague at UMBC (1)
- ☐ Colleague not from UMBC (2)
- ☐ Department chair or admin (3)
- ☐ UMBC event or communication (4)
- ☐ External event or communication (5)
- ☐ Listserv (6)
- ☐ Professional or academic organization (7)
- ☐ Conference (8)
- ☐ Blog or news (9)
- ☐ Other (10) _____

Q7 In what ways have you used OER materials in your courses at UMBC? (Select all that apply)

- ☐ I have not used or searched for OER materials (1)
- ☐ I have searched for OER materials to use in a class (2)
- ☐ I have included supplementary OER materials in a course (3)
- ☐ I have adopted an OER textbook/ other materials as the main content in a course (4)
- ☐ I have revised/adapted OER content to tailor to my class needs (5)
- ☐ I have created OER materials for use in my class (6)
- ☐ I have created OER materials and shared on an OER forum/repository (7)
- ☐ Other (8) _____

Q8 What types of OER materials have you used? (Select all that apply)

- ☐ Open Textbooks (1)
- ☐ Whole course (2)
- ☐ Sections or units of a course (3)
- ☐ Lectures (4)
- ☐ Lesson Plans (5)
- ☐ Video (6)
- ☐ Audio (podcasts, etc.) (7)
- ☐ Images or visuals (8)
- ☐ Supplementary readings (9)
- ☐ Quizzes or tests (10)
- ☐ Tutorials (11)
- ☐ Data sets (12)
- ☐ Adaptive learning (13)
- ☐ Ebooks (14)
- ☐ Library course reserves (15)
- ☐ Other (16) _____

Q9 Which specific type(s) of OER would you be interested in using in your teaching practice (Select all that apply)

- ☐ Open Textbooks (1)
- ☐ Whole course (2)

- ☐ Sections or units of a course (3)
- ☐ Lectures (4)
- ☐ Lesson Plans (5)
- ☐ Video (6)
- ☐ Audio (podcasts, etc.) (7)
- ☐ Images or visuals (8)
- ☐ Supplementary readings (9)
- ☐ Quizzes or tests (10)
- ☐ Tutorials (11)
- ☐ Data sets (12)
- ☐ Interactive/Adaptive learning (13)
- ☐ Ebooks (14)
- ☐ Library course reserves (15)
- ☐ Other (16) _____

Q10 What challenges do you face or anticipate regarding OER adoption (Select all that apply)

- ☐ Unsure how to get started (1)
- ☐ Lack of time to prepare OER materials (2)
- ☐ Unaware of where to find OER materials (3)
- ☐ Unsure about the quality of OER (4)
- ☐ Lack of departmental/collegial support (5)
- ☐ Need for funding (6)
- ☐ Need for training and/or professional development (7)
- ☐ Lack of suitable material in specific teaching area (8)
- ☐ Other (9) _____

Q11 Which resources/events would you be most interested in? (Select all that apply)

- ☐ OER faculty support community (1)
- ☐ On-campus OER workshop or event (2)
- ☐ One on one consultation to assist with OER creation (3)

- ☐ Website of OER trainings, readings & resources (4)
- ☐ Applying for an OER-related grant (5)
- ☐ Not interested at this time (7)
- ☐ Other (8) _____

Q12 What is your level of interest in adopting OER in your teaching in the next 1-3 years?

	Not Interested (1)	Somewhat Interested (2)	Undecided (3)	Interested (4)	Very Interested (5)
Please select one option (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: General Questions

Start of Block: Logic Questions

Display This Question:

If What is your level of interest in adopting OER in your teaching in the next 1-3 years? =
Not Interested

Or What is your level of interest in adopting OER in your teaching in the next 1-3 years?
= Somewhat Interested

Or What is your level of interest in adopting OER in your teaching in the next 1-3 years?
= Undecided

L1 Which of the following, if any, are reasons you answered "not interested," "somewhat interested," or "undecided" about adopting OER in your teaching in the next 1-3 years?
(Select all that apply)

- ☐ Difficult to find what I need (1)
- ☐ Lack of resources for my subject (2)

- ☐ Concern about updates (3)
- ☐ Not high quality (4)
- ☐ Questions on permissions to use or change (5)
- ☐ Lack of track record (6)
- ☐ No good print options (7)
- ☐ Lack of associated materials (8)
- ☐ Not used by other faculty (9)
- ☐ Not current/up-to-date (10)
- ☐ Lack of time/opportunity to experiment with OERs (11)
- ☐ Lack of institutional support/incentives (12)
- ☐ Resources not aligned with professional standards or regulations (13)
- ☐ Other (14) _____

Display This Question:

If What is your level of interest in adopting OER in your teaching in the next 1-3 years? = Interested

Or What is your level of interest in adopting OER in your teaching in the next 1-3 years? = Very Interested

L2 Which of the following, if any, are reasons you answered "interested" or "very interested" in OER adoption in the next 1-3 years? (Select all that apply)

- ☐ Exploring OER course materials (1)
- ☐ Including supplementary OER materials in a course (2)
- ☐ Revising OER materials to tailor them to your class (3)
- ☐ Adopting an entire OER course (4)
- ☐ Creating an OER textbook or other content (5)
- ☐ Sharing materials you have created on an OER repository (6)
- ☐ Working towards department-level adoption of OER for core course (7)
- ☐ Participating in OER assessment and research (8)
- ☐ Applying for a OER-related grant (e.g. M.O.S.T., Hrabowski) (9)
- ☐ Other (10) _____

End of Block: Logic Questions

Start of Block: Optional Questions

Q13 Additional comments or questions about OER:

Q14 Would you be interested in the following (Select all that apply)

- ☐ OER Resources (1)
- ☐ OER Events (2)
- ☐ Hrabowski Innovation Grant proposal for OER adoption (3)

Display This Question:

If Would you be interested in the following (Select all that apply) = OER Resources

Or Would you be interested in the following (Select all that apply) = OER Events

Or Would you be interested in the following (Select all that apply) = Hrabowski
Innovation Grant proposal for OER adoption

Q15 Enter your contact information here:

- o First Name (1) _____
- o Last Name (2) _____
- o UMBC Email address (3) _____

End of Block: Optional Questions