10-12-2023

Action Plan: Equity Through OER Rubric Pilot Project

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Action Plan
Equity Through OER Rubric Pilot Project

About the Action Plan

The purpose of the action plan is to provide a roadmap or blueprint for how you will move equity through OER forward at your institution or system. Action plans will identify strategies, actions, and requirements–including resources needed–for each of the rubric dimensions and categories; evidence and metrics to measure how you will know if you are advancing in each area; who needs to be involved, as actors, decision-makers, and stakeholders; how you will work towards implementation and sustainability. Action plans are expected to be comprehensive and aspirational, while also realistic in terms of feasibility and the level of challenge implementers will face as they work to put the plan in place.

Anticipated audiences include internal stakeholders and colleagues, encompassing executive leadership, administrators, faculty, staff and students, but the Action Plan is especially intended for your own reference as you continue to move equity through OER forward. Action Plans will not be public facing unless you choose to make them so. At the same time, this template asks for some contextual information about your project so that those unfamiliar with it can understand your action plan.

You may write and format this report in whatever way works for you (as a narrative, bulleted responses, in a spreadsheet) so long as you provide information for each of the requested sections.

As a reminder, another deliverable of the project is a case study. We envision the case study as a narrative telling the story of your engagement with the rubric and participation in this project, including lessons learned. It may be helpful to keep this in mind as you write this action plan.

After submitting this report, feel free to transcribe this Action Plan to the project management or spreadsheet software of your choice as appropriate.

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University of Northern Colorado

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October 12th, 2023

Overall Rationale and Purpose for Your Participation in the Project

After attending the DOERs3 Equity through OER rubric pilot project presentation by Liliana Diaz Solodukhin at the May 2022 Colorado OER Conference in Denver, we made the decision to apply to pilot the rubric at our institution. Since 2018, the University of Northern Colorado has gained momentum in our use of open educational resources and affordable practices for students, thanks in large part to efforts by UNC's Affordable and OER (AOER) Committee. We realized we had not yet had in-depth discussions of how our AOER initiatives intersect with equity, and that our grass roots initiative, while successful, needed an assessment and a longer-term plan in order to move forward and evolve. Our hope is that our work creating a DOERs3 action plan will solidify connections between OER and equity on our campus and ensure that concepts of equity are integrated into our OER initiatives. We want the connection between equity and OER to be clear to our campus community and show how the OER work we do is a benefit to students and instructors. We believe the following objectives for action, assessment, and continual improvement are attainable within the presented timelines.

Working Group Priorities

There are three major ongoing priorities that have surfaced from our DOERs3 gap analysis.
1. Raise student, instructor, and administrator awareness of OER and its status on campus.
2. Increase the number of Liberal Arts Curriculum courses that use OER as their primary course materials.
3. Solidify the connection between OER and DEI as complementary techniques to improve both student learning and a sense of belonging.

To make progress on these priorities, we have identified a number of concrete goals, described below. We believe these six goals map to UNC's Rowing not Drifting strategic plan priorities of putting students first, empowering inclusivity, innovating and creating, instructor development, and strategic enrollment initiatives.

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Goals

I. **Goal: Increase student awareness of OER**
   a. Strategy: Create an overarching internal and external marketing communication plan and consistent messaging for both potential and existing UNC students and their families about OER courses.
   b. Evidence and metrics: Track how many students receive the various messages about OER (reach) and how many students participate in OER-related campus events.
   c. Stakeholders: Students, so they can make informed decisions regarding course materials costs; Leadership, because making this information available to students can enhance recruitment and retention efforts.
   d. Actions:
      1. Improve the accuracy of course markings data and market to students how to identify the materials costs for their courses on the course schedule.
      2. Analyze existing UNC marketing materials to students and increase the information students receive about OER and free-to-students resources to raise awareness of OER and help them make informed decisions about their course selection.
      3. Create a marketing plan for advisors to reach students during the registration process.
      4. Ensure that OER is included in a formal institutional level marketing plan
      5. Ensure that leadership formally acknowledges OER, and OER is a formally recognized part of student recruitment efforts including concurrent enrollment, LAC, emerging Hispanic Serving Insititution, and the Aims Community College 2 UNC initiative.
      6. Help OER become a pride point when administrators talk about UNC
      7. Improve UNC's [cost of attendance tool](#) to give an OER option
      8. Inform students of data privacy aspects and hidden fees of automated textbook purchasing plans
      9. Create and promote events geared toward students, using the work of US PIRG.
      10. Recruit a student representative to serve on the AOER committee.
      11. Create an OER student position to create events for students (e.g. tabling) and conduct focused and consistent outreach to the student body and student government

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e. Responsible parties: AOER Committee, Textbook Affordability Librarian, Registrar, Advising, Marketing and Communications
f. Requirements (human and financial resources, buy-in from leadership, faculty and others, data, etc.): Buy-in from leadership to continue to help with improving course markings accuracy, Textbook Affordability LIbrarian to supervise student position
g. Timeline: Actions for goal 1 timelines vary, completion between summer 2023- summer 2025
h. Supported rubric dimensions: 1.3, Student awareness of OER

II. **Goal: Fully and accurately implement OER course markings initiative**
   a. Strategy: Create systems of accountability for reporting course materials and their costs.
   b. Evidence and metrics: Generate reports of course materials reported to the book store each semester. Calculate percentage of course sections that have course materials reported and track: overall reporting rate, rate by college and academic unit, rate by LAC classification, and rate by course level.
   c. Stakeholders: Instructors, unit leaders, Academic Affairs leadership, Bookstore management, Registrar, Office of Institutional Research and Effectiveness (OIRE).
   d. Actions:
      1. Continue to ask instructors to self-report course materials to the bookstore via a communication from the bookstore.
      2. Rely on unit leaders to ensure reporting for the many courses for which course material information never gets reported (due to instructor oversight, courses taught by adjuncts, change in instructors).
      3. Work with Academic Affairs, the Registrar, and Faculty Senate to develop policies requiring unit level reporting of course materials.
      4. Work with Information Management & Technology (IMT) and the Bookstore to explore alternative processes to ease the process for instructors to submit course materials and for the institution to track them.
   e. Responsible parties: AOER Course Markings subcommittee, Provost office
   f. Requirements (human and financial resources, buy-in from leadership, faculty and others, data, etc.): Buy-in from Academic Affairs and unit leaders, increased communication with instructors and the Bookstore

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g. Timeline: Fall 2023 – develop policy with Academic Affairs; collect initial evidence/metric baseline. Spring 2024 – pilot unit level reporting. Fall 2024 – measure effectiveness of pilot; finalize policy with revisions as needed.

h. Supported Rubric Dimensions: 2.3.a (primary) Infrastructure: Course marking responsibility 1.3, Student awareness of OER 2.2.b, Quality of OER content 2.3.c, Infrastructure: Bookstore engagement, 3.1, Ongoing Assessment: Quantitative and Qualitative

III. **Goal: Ensure OER use is a recognized strategy for equity minded teaching and retention efforts**

a. Strategy: Integrate OER professional development in broader professional development initiatives focused on diversity, equity, and inclusion in teaching. Position OER professional development adjacent to or combined with DEI professional development.

b. Evidence and metrics: Analyze existing UNC professional development opportunities to determine what percentage include or reference to OER. Count number of OER professional development opportunities for instructors and DEI professional development opportunities, and track the correlation.

c. Stakeholders: DEI office, Center for the Enhancement of Teaching and Learning (CETL), instructors, college DEI committees/deans, AOER committee

d. Actions:
   1. Work with offices of DEI, college level DEI committees, and CETL to identify current professional development activities and encourage or offer sessions on the use of OER.
   2. Work with the organizers of college level DEI professional development days to include a session about equity-minded teaching. The AOER committee should work with the organizers to include a session about using AOER.

e. UNC leadership values and acknowledges OER in formal university DEI plans,

f. Responsible parties: CETL, AOER committee, Office of DEI

g. Requirements (human and financial resources, buy-in from leadership, faculty and others, data, etc.): Buy-in from UNC leadership

h. Timeline: Identify opportunities in AY 23-24, add professional development sessions as appropriate in AY 24-25.

i. Supported rubric dimensions: 2.1, Instruction & pedagogy, 2.2.a, Content: Quality of OER content, 3.2, Continuous Improvement: Leadership commitments

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IV. Goal: Ensure OER and equity work is recognized in faculty evaluation criteria across campus

  a. Strategy: As the university reconsiders approaches to faculty evaluation, ensure that OER work, in conjunction with DEI and equity-minded pedagogy, are valued in evaluation, tenure and promotion, and sabbatical leave criteria.
  b. Evidence and metrics: Track the percentage of academic units that include equity focus or OER as a measure of success in faculty evaluation criteria.
  c. Stakeholders: Academic Affairs, Faculty Senate, instructors, unit leaders
  d. Actions:
     1. Meet with Academic Affairs leadership to determine their goals for revision of evaluation criteria.
     2. Create model language for inclusion in unit-level faculty evaluation and utilize the DOERs3 OER in Tenure and Promotion rubric to help inform this sample template.
     3. Work with faculty governance to include language about OER and DEI in teaching responsibilities and evaluation procedures.
     4. Work with Office of Assessment to ensure these criteria are part of the unit review process.
     5. Revise definitions of teaching and professional activity in UNC board policy to explicitly include OER as belonging to those categories, as appropriate. Additionally, ensure that OER-related work is valued as an appropriate use of sabbatical leave
     6. Educate units about the importance of these in evaluation criteria.
  e. Responsible parties: Faculty Senate, Academic Affairs, AOER Committee
  f. Requirements (human and financial resources, buy-in from leadership, faculty and others, data, etc.): Buy-in from faculty is challenging whenever revision to evaluation is concerned.
  g. Timeline: Revision to board policy during AY23-24; revision to unit's evaluation criteria over the next 6 years (through AY29-30).
  h. Supported rubric dimensions: 2.1, Instruction & pedagogy, 3.2, Continuous improvement: Leadership commitments

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V. Goal: Increase the number of Liberal Arts Curriculum (LAC) courses that use OER

   a. Strategy: Identify and create multiple pathways through the LAC that require no commercial textbook purchases to advertise to students as a "Zero Cost LAC" or "Free LAC" materials pathway.

   b. Evidence and metrics: The LAC is divided into four categories with students required to take between 1 and 5 courses in each category. Additionally, two of the courses taken in the 31 credit program must come with designations of *US Multicultural Studies [MS]* and *International Studies [IS]*. Successfully acheiving this goal would mean, at a minimum, there are enough OER-using courses in each category that a student could complete the LAC by taking courses that only use OER. Ideally, there would be enough courses in the LAC to give all students the choice of multiple courses in each area (so there are twice as many courses using OER than are required to complete the LAC). Creation of such pathways should also motivate other LAC courses to adopt OER, so tracking the percentage of OER-based LAC courses should also be used as evidence of success.

   c. Stakeholders: Liberal Arts Council, AOER Committee, Textbook Affordability Librarian

   d. Actions:
1. Create and maintain a list of which LAC courses use OER to identify which categories need additional OER-based courses.
2. Create and maintain a student-facing resource of OER (and additional OER) that are available for LAC courses.
3. Add a "Will your course use OER for its course materials" question in the LAC approval/renewal/assessment process.
4. Publicize the "Zero Cost LAC" or "Free LAC" pathways on the LAC website and to advisors.

   e. Responsible parties: Textbook Affordability Librarian, Liberal Arts Council chair

   f. Requirements (human and financial resources, buy-in from leadership, faculty and others, data, etc.): Buy-in needed from Liberal Arts Council and its curriculum subcommittees. Maintenance of Zero Cost LAC pathway list.

   g. Timeline: Work toward Actions 1 and 2 Fall 2023, complete by Spring 24. Action 3 can be done AY23/24. Depending on how many new courses are required for pathway, action 4 might take longer.

   h. Supported rubric dimensions: 1.3, Student awareness of OER, 2.2b, Content: OER across the curriculum

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VI. Goal: Improve assessment of OER impacts regarding Diversity, Equity and Inclusion and student success

  a. Strategy: Develop an assessment plan for OER, including its impacts on underrepresented students and create a dashboard with OIRE to make this data widely available.

  b. Evidence and metrics: Determine which courses use OER and answer these questions: Are OER offered in courses with higher numbers of under-represented, Pell eligible, and first-generation students, in courses with multicultural content, in LAC curriculum courses, and in GTPathways courses. Further evidence would be that there is formal recognition of OER in UNC strategic initiatives, and leadership shares with campus the variety of ways that OER is important.

  c. Stakeholders: UNC leadership, because having access to accurate data can increase student recruitment and retention.

  d. Actions:
    1. Identify gaps and promote OER and free to students options to instructors of the courses identified in b.
    2. Identify existing data and what data needs we have, as well as the support needed to analyze the data
    3. Determine what data we need to collect or already have that helps us better understand the impact OER has on instruction and pedagogy while centering the importance of equity in the category

  e. Responsible parties: Bookstore, IMT, AOER Committee, Textbook Affordability Librarian

  f. Requirements (human and financial resources, buy-in from leadership, faculty and others, data, etc.): time needed from staff in OIRE to develop dashboards. Requires the completion of textbook markings goal to ensure valid data.

  g. Timeline: Complete by December 2024

  h. Supported rubric dimensions: 3.1, Ongoing assessment: Quantitative and qualitative

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Risks and Challenges to Implementing Your Action Plan

At the University of Northern Colorado, we have a solid base for OER initiatives and an increase in OER use by instructors since 2018, the year our campus-level AOER committee officially started work. We foresee no risks to implementing our action plan and believe it will be well-received when we present it to university leadership in spring 2024, including the UNC leadership cabinet, Academic Affairs Leadership Team, AOER committee, faculty and staff senate, and more. Our biggest challenges to the implementation of our plan will be any turnover in university leadership and other key personnel identified in this action plan. An additional challenge will be the changing landscape and influence of so-called "inclusive access" programs and how to stay in front of and address problematic vendors related to courseware access and pricing.

In spite of understaffing and turnover in the past, UNC has continued building our OER work for students and this action plan should help this work become more visible and tied to equity.

Lessons Learned

Writing strategic plans is always a challenge. Not only is it difficult to identify what are the best projects to tackle first, or what will have the most impact, it is difficult to organize everything we want to do in a way that can be communicated well to outside constituents. Further complicating the task is the need to conform to the structure provided by the rubric. Many of our ideas for actionable projects span multiple rubric dimensions. However, having the rubric and our gap analysis was helpful in framing discussions about what tasks we should tackle as part of this action plan. Ultimately, we decided to organize our action plan around goals that have the potential to improve our ratings in multiple dimensions of the rubric, rather than structure the action plan rigidly around the rubric.