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Strategies for Scaling and Sustaining OER Initiatives

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2018 Northeast OER Summit Workshop

Strategies for Scaling & Sustaining OER Initiatives

Josh Baron · Julie Curtis · David Wiley · Lumen Learning



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Introductions

Your Name

Your Institution

1 sentence: What are you doing with OER?

How OER Initiatives Grow



Startup Stage

Common Characteristics

Few faculty & courses • running in “pilot mode” • limited leadership support • one-off funding

Key Challenges

Limited awareness/understanding
Tackle initial learning curve
Demonstrate value



Scaling Stage

Common Characteristics

Larger #s of faculty/courses • tied to institutional goals • leadership support • funding strategy

Key Challenges

Build awareness & enthusiasm
Systematic support for faculty
Sustain & institutionalize impact

Workshop Overview

Objective: *Gather ideas and resources needed to develop a strategy for scaling and sustaining OER initiatives.*

Safety Warning: *Fasten your seatbelts!*

- Three major topics:
 - Building Awareness & Enthusiasm
 - Supporting Faculty Through Change
 - Sustaining Change and Impact
- Activity formats:
 - Small/large group discussions
 - Lightning capture exercises
 - Share out
- Resources:
 - Planning Template
 - OER Champion Playbook

Workshop Tool

OER Champion Playbook

URL:

tinyurl.com/OERPlaybook

[OER Champion Playbook](#) [Planner Tool](#) [About](#)

OER Champion Playbook

A collection of 'plays' you can use to expand effective use of OER



Teams use playbooks to plan and execute moves to help them score and win.

This playbook equips you with great plays, strategies, and tools to help you achieve a significant impact on teaching and learning using [open educational resources \(OER\)](#).

Identify your challenge and find some great plays.



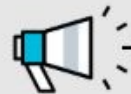
Making the Case for OER

Build a network of supporters to advocate for the change you



Measuring Impact with OER

Define what success looks like for your initiative and how you'll



Building Awareness & Enthusiasm

Generate awareness, excitement, and momentum to

Scaling & Sustaining OER

Challenge: Building Awareness & Enthusiasm

Pop Quiz

Go to:

goo.gl/NkE9BC



Building Awareness & Enthusiasm



Startup Stage

Objective

Get ANYONE to
say YES to OER



Scaling Stage

Objective

Get LOTS of
people to say
YES to OER

Building Awareness 101

Lightning
Round

Tool:

Scaling & Sustainability Planning Template

Hard copies on your table

Digital Version: goo.gl/WEycvu

- Download & save your own copy

Building Awareness 101

Lightning
Round

2 minutes capture

What are your objectives?

Building Awareness 101

Lightning
Round

2 minutes capture

Who are you targeting?

Hint: Low-hanging fruit

Building Awareness 101

Lightning
Round

7 minutes brainstorm/explore/capture

**Where and how can you
reach them?**

Hints: Playbook; table sharing; all the
ways people get info on your campus

Building Awareness 101

Lightning
Round

3 minutes discuss/capture

Prioritize: Which will be most achievable & effective for you?

Select 3-5 ideas to pursue this year

Building Awareness 101

Lightning
Round

Share Out

What did you prioritize?

Why?

**Successes or approaches
you'd recommend to others?**

Marketing Strategist 101

Next Steps

Make it happen.

Schedule

Execute activities

Evaluate

What worked, what didn't, how to improve?

Scaling & Sustaining OER

Challenge: Supporting Faculty through Change

Supporting Faculty through Change

Lightning
Round

1 minute table discussion

How do you *support* faculty through the change and innovation process?

Hint: Think about how you can lower barriers to change...



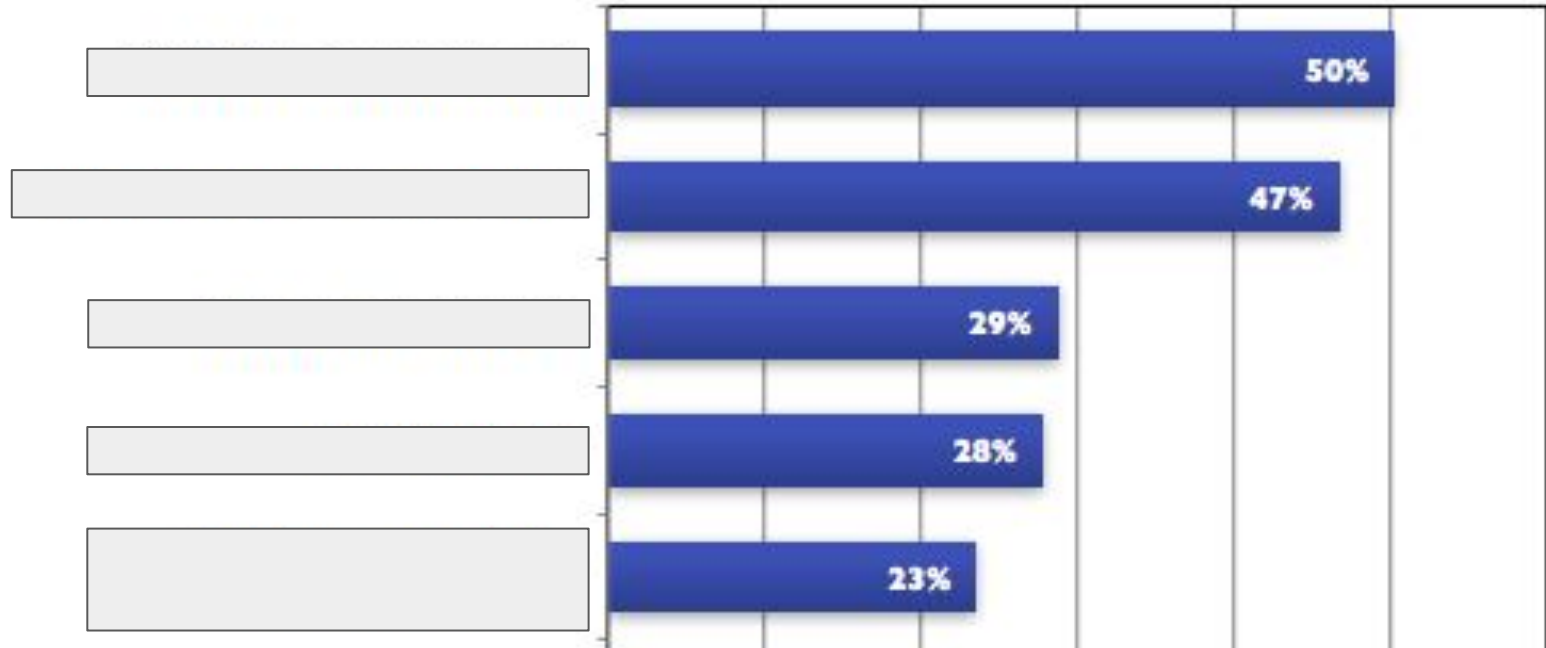
Team Quiz

Top Five Answers on
the Board

According to U.S. higher education
faculty members in 2016-17:

**What are the top five
barriers to faculty
adopting OER?**

BARRIERS TO ADOPTION OF OER - 2016-17



Source: [Babson Survey Report: Opening the Textbook: Educational Resources in U.S. Higher Education, 2017](#)

Supporting Faculty through Change

Lightning
Round

5 min. whole group discussion/brainstorm

**What are some of the
challenges you face
overcoming these barriers?**

Ex: You don't have enough staff to keep
OER content updated.

Supporting Faculty through Change

Lightning
Round

Lightning capture

Scaling & Sustainability Planning Template

Hard copies on your table

Digital Version: goo.gl/WEycvu

Supporting Faculty through Change

Lightning
Round

2 minutes capture

What is/are the most important challenges or barriers you can address?

Hint: What would have the largest impact on your institution's strategic goals?

Supporting Faculty through Change

Lightning
Round

2 minutes capture

**What resources are available
today to address these
challenges?**

Supporting Faculty through Change

Lightning
Round

7 minutes brainstorm/explore/capture

**What can you do to
significantly improve how
you support faculty?**

Hints: Playbook; table sharing; think
creatively!

Supporting Faculty through Change

Lightning
Round

3 minutes discuss/capture

**Prioritize: What steps will
you take *this year* to make
this happen?**

Select 1-3 ideas to pursue this year

Supporting Faculty through Change

Lightning
Round

Share Out

What did you prioritize?

Why?

**Successes or approaches
you'd recommend to others?**

Scaling & Sustaining OER

Challenge: Sustaining Impact & Change

Sustaining Impact & Change

Lightning
Round

Sustaining impact and change requires resources...

Services, staff, technology, training,
funding, etc.

Each of these has a real cost

Some costs are short-term and some will
never go away...

Sustaining Impact & Change

Lightning
Round

5 min. whole group sticky note brainstorm

What resources do you need to start, grow and sustain an effective OER initiative?

Costs for Sustaining Impact & Change

Start-Up

One time costs

Ex: OER Scale-up
Kick-off event,
student testimonial
video

Short-Term

1-5 Year Costs

Ex: Professional
development, faculty
mini-grant program

Long-Term

5+ Year Costs

Ex: Maintaining
content, accessibility
compliance,
technology platforms

Sustaining Impact & Change

Sustainability Models

- **Institution-allocated budget**
 - **Pros:** student's don't pay anything
 - **Cons:** hard to maintain, dependent on a single leader
- **OER course fee**
 - **Pros:** Students get 75-85% cost reduction
 - **Cons:** *Perceived* politics can require time/effort to overcome
- **Bookstore payment processing**
 - **Pros:** Easy-to-implement familiar process
 - **Cons:** Often includes a markup of 30-40%
- **Multi-institutional/System support services**
 - **Pros:** Can reduce costs for institutions, helps coordination
 - **Cons:** Requires strategic commitment/sustainability model

Sustaining Impact & Change

Lightning
Round

Lightning capture

Scaling & Sustainability Planning Template

Hard copies on your table

Digital Version: goo.gl/WEycvu

Sustaining Impact & Change

Lightning
Round

5 minutes capture

**Which sustainability model(s)
would work best to start to
explore at your institution?**

Hint: Think long-term and strategically

Sustaining Impact & Change

Lightning
Round

2 minutes discuss/capture

Prioritize: What sustainability model(s) make the most sense for your institution?

Select 1-3 ideas to pursue this year

Sustaining Impact & Change

Lightning
Round

Share Out

**What's been successful for
your institution to date?**

**What insights did you get
from the discussion?**

Thank you.



What's a playbook?

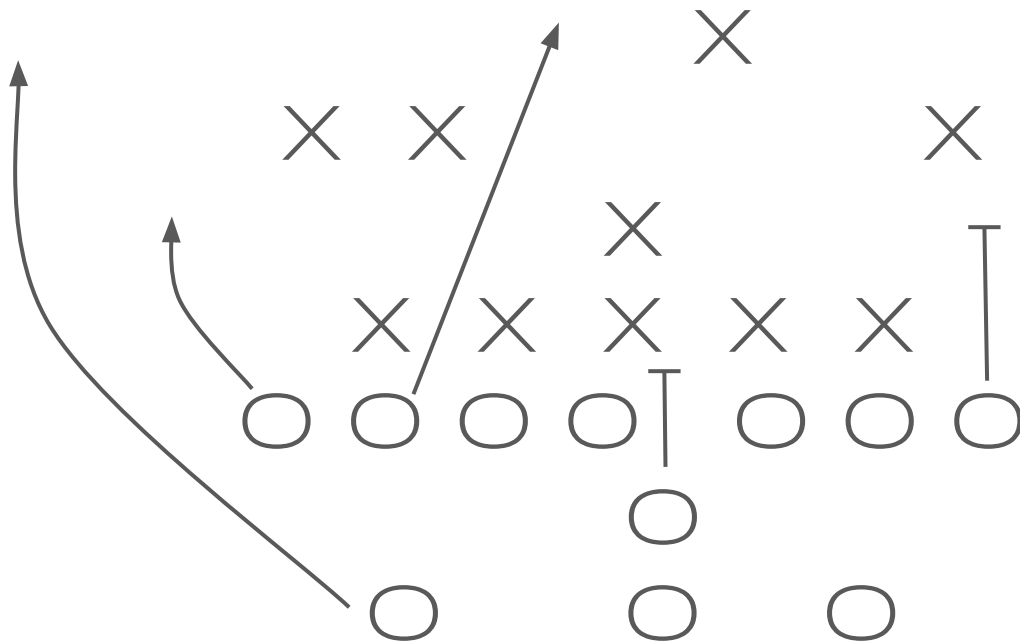
Teamwork

Strategies

Moves

Plays

Score & Defend





Section Divider

Fonts.

Helvetica Neue for titles.

Franklin Gothic for subtitles and tables.

Helvetica Neue for regular words.

Color should match our palette and stand out against the background. Super bonus: These fonts are PPT-friendly.

Examples of how to use photos:



Section Divider



Header	#5b5b5b	Header	Header	Header
Subheader	#8c8989	#ffd600	Subheader	Subheader
Content	#e6e6e6	#1e74d1	Content	Content
Content	Content	#f86464	Content	Content
Content	Content	#9262e1	Content	Content
Content	Content	#00b3d6	Content	Content
		#6d20b2		

This is a table containing our palette
(Use red and yellow accents sparingly)

Point Number One
Another Point
Three are OK
Four is Likely Max