OER Action Plan

For

Kansas State University's Open Alternative Textbook Initiative

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Scholarly Communication and Copyright Librarian

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Executive Summary

About the Program:

The Open Alternative Textbook Initiative (OATI) started at K-State in 2013 as a grant program to provide funding to faculty for the use of developing, adapting, or adopting open or alternative[1] resources. The project was founded between the Library and its representative Beth Turtle (Scholarly Communication Librarian) and two faculty members: Dr. Brian Lindshield (Food Dietetics Nutrition and Health), Dr. Andrew Bennett (Mathematics). The primary aim of the initiative is affordability and the reduction of the need for students to purchase physical copies or access to costly commercial materials. Grant winners received on average a sum between $2,000 and $5,000 to be used at their discretion (supplemental salary, professional development funds, hiring students for design, translation, assistance building resources, etc. and is taxed accordingly). In 2016 the course fee was introduced in an effort to grow the program and garner faculty buy in. The course fee is a $10 charge per student in a course that employs an open/alternative resource or resources of no cost to students. Approximately $9 of this money goes back to the department that is hosting the eligible course. The remaining goes towards bad debt and the continuation of the OATI program.**[2]

Currently in our ninth year of administration, the Open Alternative Textbook Initiative needs to look at what it would put in a 10-year report and where it hopes to go in the future. These two areas ironically hit on the current greatest strength and greatest weakness of our program. Administration of the OATI has been tumultuous with little documentation and complications from employee turnover on the two-to-five membered OATI Panel. This lack of documentation is exacerbated by both inconsistently gathered data and inconsistently applied metrics making use of available data. A powerful and generic focus on growth led us to our lack of understanding of what a 10-year report would and should assess and what one could assess as a result of missing data. On the other hand, our future potential and possibilities, while not limitless, are supported by a decent sized sum of money, over $400,000 (at the time I am writing this). The time is now for a systematic overhaul of our program so we can celebrate and effectively capitalize on our new found and limited strength and overcome our prior shortcomings and weaknesses.

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[1] *Alternative here defined as library licensed content or compilation of student-cost-free material.*
[2] *Actual breakdown: supporting department (89%), bad debt (2%), and the Open/Alternative Textbook Initiative (9%).*

Action Plan and the Future of the Open Alternative Textbook Initiative

The following action plan aims to prepare the Open Alternative Textbook Initiative for a more successful, metric driven, and sustainable future. First, the current OATI administration is presented along with information on our current financial footing. Then content on what goes into administering the initiative helps provide context for other parts of the report. Moving into the core of the report, seven topic areas of interest to the future of the initiative are presented.

1. Curate and Display K-State OERs
2. Develop and Present Meaningful Metrics that Assess Our Program
3. Create and Curate Meaningful Resources for Grant Winners and Campus on OER
4. Feature and Celebrate OER Movers and Shakers (OER All-Stars)
5. Bring Student Input and Activism Back into the Program
6. Chaperone the Creation of Robust Sustainable OERs
7. Consider the Sustainability of our Program

Each of these topic areas is complimented by a concrete SMART Goal that addresses or starts addressing gaps in that area. The plan continues by presenting a proposed timeline to ensure each goal gets the time and attention it deserves, providing for a smoother and more sustainable future. While we are fortunate enough to not worry about money at the moment, a budget and resources section shows this was not always true and makes clear our need to plan for the return to a more familiar funding level. This section also pauses to reflect on the human and technological resources, with actual or implied costs, that need to exist for the initiative function. This section is followed by an analysis of future communication and outreach needs for maintaining project functions in spite of recent changes, strengthening campus understandings of the project and engaging deeper with stakeholders. Already tackling aspects of some of the goals and demanding more effective communication, the next section on evaluation and assessment planning uses the themes in the C.O.U.P. framework to work through existing questions and areas for metric gathering that will benefit of the program in the future. The report ends with a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis that manages to encapsulate and distil the sections of the report coming before it effectively before a short thank you to those who made this action plan and related work possible.
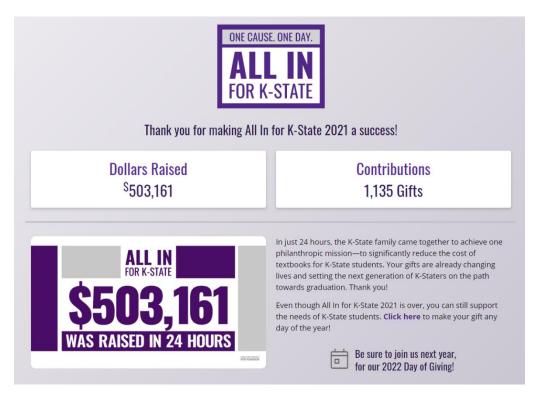
Preface

About the Administration:

Emily G. Finch, Scholarly Communication and Copyright Librarian inherited the administrative responsibilities of the Open Alternative Textbook Initiative with her appointment to K-State Libraries' Center for the Advancement of Digital Scholarship in February of 2020. Other primary stakeholders since her employment have included the members of "the OATI Panel:" Ryan Otto (CADS Scholarly Communication Librarian), Laura Bonella (Academic Service Department Head-CADS being a subunit of Academic Services), Dr. Brian Lindshield (Food Dietetics Nutrition and Health), Dr. Andrew Bennett (Mathematics), Dean Lori Goetsch (Dean of Libraries –Summer 2021) Dean Joe Mocnik (Summer 2021-). Other important stakeholders that ensure the function of the OATI include the library financial services team which helps track the fee and distribute grants, the Registrar and Central Administration who apply the fee logo to courses in the catalog (logo displayed to the right) for students to search for an discover low cost courses and coordinate the student billing for the fee, and the Student Governing Association which worked with the OATI to come up with and institute the course fee.

About the Fundraising Campaign:

In 2020 the Open Alternative Textbook Initiative was selected as the recipient of "All In" a one day cross campus fundraising day, where all proceeds would go to support the initiative under the campaign "Textbooks 2.0." Due to the pandemic the fundraiser was postponed and the grant received support in the spring of 2021; as the All In recipient the Open Alternative Textbook Initiative raised over $450,000. Support from the campaign not only made possible the future of the OATI, but also helped shape how the project is slated to develop, grow, and shift to a sustainability model. These proposed changes include reserving "alternative" designated work for the course fee, shifting the grants to a full OER model, the expectation that works are created via Pressbooks or Libretexts (or of custom creation of equal or superior quality and accessibility), among others.

Running the K-State Open Alternative Textbook Initiative

Administering the OATI typically involves coordinating information sessions held for prospective applicants to come and ask questions (the OATI Panel absent the Dean of Libraries attends), conducting fall and spring semester course fee evaluation (no longer an application with a review process as with previous iterations, but instead a confirmation of no cost material and data gathering period) and hosting the fall and spring semester grant reviews bringing the OATI Panel, a representative from the Student Accessibility Center, several past recipients and representatives from the Student Governing Association together to determine which grants to move forward with. In addition to these functions submitting transfers for grant awards with library financial services (distributed in halves one initial half sum to get faculty started and a final half payment upon completion of the resource and a report documenting how the first implementation of the resource went), collecting courses eligible for the fee and coordinating the student billing side and visibility in the course catalog with the Registrar and Central Administration, and providing platform and OER development support. Finally this individual is charged with compiling basic data on the number of awards and course fees distributed, demographic information that documents campus buy in, and reflections on the administration of this project in fiscal year reports made available to the OATI Panel, library administration, and the Foundation (the philanthropic wing that coordinates All In), which in some years has been shared with the Board of Trustees, Kansas Board of Regents, and other institutions interested in the program on a case-by-case basis.

Administrative Documents

In the appendices you will find some of the documents used to administer the program. An OATI Standard Operating Procedure is constantly in revision with hopes to finalize most of it upon the first post All In grant cycle in December 2021.

- Appendix A: Key Dates and Timeline
- Appendix B: Qualtrics Questions for the Application for the Grant
- Appendix C: Qualtrics Form for Course Fee Management (A duplicate exists for the September implementation for upcoming Spring Courses.
- Appendix D: New (8/30/2021) Criteria for Grant Applications
- Appendix E: The MOU required of each applicant who accepts their grant.

Sample Fiscal Year Reports

Rather than post others' content without their permission, a copy of the shorter than usual FY 2020 Report written by Emily G. Finch has been shared. Due to a recent start, COVID, and lack of data, a theme revisited in this report a stronger report does not exist for 2020 and the FY 2021 Report is still in drafting stages as data is reconciled.

- Appendix F: Open Alternative Textbook Fiscal Year 2020 Report

SMART Goals for the Open Alternative Textbook Initiative at Kansas State University

As we enter the ninth year of OATI administration (nine years of the grant and six years of the course fee as of the 2021-2022 term) the OATI needs to look at what a decade of existence means as we celebrate our trajectory but also consider our future. Looking at the program, broken down in the previous sections, the time to consider how we need to move forward in the short and the long term to ensure the Open Alternative Textbook Initiatives continued success, is now. Taking the Open Alternative Textbook into the next decade, we will concentrate on the following seven themes as filtered through an actionable related goal. These goals were developed as SMART: **S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime-Based goals. A specific goal listed and deconstructed based on the next seven topic areas, and context around each goal is provided along with the SMART rationale. They are presented within this framework to ensure that these goals are indeed actionable and primed for success starting with the first non-campaign All In-funded grant review cycle in December 2021.[3]

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[3] Template for SMART Goal From the Open Education Network OER Action Plan Template (CC-BY)

1. Curate and Display K-State OERs

The Open Alternative Textbook Initiative has not tracked what platforms or tools final products end up using, nor does it track where projects are stored or how they are disseminated. A requirement of the grants is that they are used in a corresponding classes, but how they are accessed by students or if their use extends beyond that classroom at all remains unknown—quite possibly failing on the "open" front; this is a problem especially as we shift to an OER model with expected creative commons licensing and intent to make the work accessible as dictated by the MOU. While some previously funded projects were more "alternative" by nature and intent, and resided in Canvas, others were more robust books created using a variety of tools from pdf to iBooks Author and everything in between. Moving forward the initiative (for the most part) expects grant winners to use either Pressbooks or Libretexts to create their resources. In the past some authors have formally published their final works with New Prairie Press, the K-State Libraries' Digital Press a process we hope continues---but how do we enforce open, provide a space dedicated to open to show our commitment to open and offer authors the ability to showcase their work (an incentive for the increased robustness anticipated and the expectations of the OATI Panel?)?

SMART Goal: By the end of fall 2021 have developed and submitted a proposal for how and where to create a K-State OER Library and a plan to migrate previously developed content to it and encourage new content to be excited about and make use of the space.
Specific Steps I Can Take: ● Explore the opportunities offered by several existing options 1) expectation to sign an MOU and publish with New Prairie Press should there be interest in joining the "OER Library," 2) working with Communications and Marketing to explore a page on the website or linking to a hand coded web page, 3) creating a lib guide linking out to resources where they exist elsewhere or based on saving them as PDFs and attaching files, 4) with no image and basic metadata in an institutional repository collection, and or new options. ● Create pros and cons lists for each of the options above to help lead to a decision. ● Select the location with the greatest number of pros and least number of cons and draft a report on why this choice is the best fit, how we would handle developing the resource, and how we would ingest content into it. ● With approval from other stakeholders submit a proposal to the OATI Panel and library administration on the solution including the reason it is needed and the report to back it up our findings and decision to move in a particular direction.
Potential Collaborators & Resources: ● Ryan Otto colleague, panel member, and library administrator of our institutional repository K-Rex (the K-State Research Exchange). ● The library's external bepress representative that coordinates our hosted --New Prairie Press and supports its work. ● K-State Libraries Communications and Marketing whose staff runs and designs our

website.
- The OATI Panel who will ultimately rule on their approval of the solution and when to move into implementation.

Potential Barriers:

- Quality and accessibility of final products.
- Time and resources allocated to the success of implementing the solution.
- Agreement on the solution and robustness desired for the solution.

Questions/Issues I Need to Resolve:

- Quality and accessibility issues. Should we create our own web page can we build it the right way and in a good and visually pleasing enough way?
- Legal and ethical concerns and considerations that my complicate the use of some solutions; for example, with New Prairie Press does a permission to publish need to be signed for each item? If they don't seek an ISBN, can they just be added to an instance? Does it matter after they already have creative commons licenses assigned that allow non-commercial reuse?
- Interest from and existence of past resources; what if we only hear from recent or developing resources and there is an absence of older works reflected in our collection?
- Support. Whose job and time is delegated to fulfill the implementation and success of any of these solutions?

Desired Outcome(s)

- Evaluation of potential tools with/places to build the library.
- Determination of a best fit location for our needs.
- Reconciliation of potential issues with the location selected.
- Plan developed for how we would ingest the products of new grant products and existing resources.
- Decisions on who will solicit and build the resource.
- Proposal encompassing the above to pitch to stakeholders.
- Approval of the proposed solution and action taken to enact it.

2. Develop and Present Meaningful Metrics that Assess Our Program

The Open Alternative Textbook Initiative has focused very heavily on growth and less on both 1) data collection enforcement or practices and 2) setting up the assessment and metrics we hope to use to evaluate our program. Our definition of success has ultimately been existence, continued financial support, and said growth. As we near 10 years, a deeper look at what data we have, what data we can get to catch up to date or use to reconcile fragmented data, and what data we want, in addition to why and how we want to represent it, is important. It is essential not only for our reputation and success moving forward but will also help us understand what we consider success and how we can improve our initiative.

SMART Goal:

By the end of Spring 2022 as we enter the 10ᵗʰ year, have coordinated a stakeholder meeting to ensure we agree on metrics to appear in a 10 year report on and evaluation of the initiative and what metrics we need to develop to ensure the success and betterment of our work moving forward. Use this time and discussion to draft a list of what we hope to see from a 15 year report and evaluation in 2028.

Specific Steps I Can Take:

- Select a meeting time all stakeholders can attend.
- Create an agenda to keep us on track and assign a note taker from the OATI Panel to take notes with me as I facilitate the meeting.
- Contact the stakeholders about the meeting and invite them.
- Bring the most recent (FY 2021) fiscal year report and the equations used to calculate metrics included in it.
- Ensure all project data is one location so potential metrics grown out of the existing data can be considered.
- Save notes and reiterate the plans for the 15 year report inside the 10 year report.

Potential Collaborators & Resources:

- The OATI Panel (Ryan Otto, myself, Laura Bonella, Dr. Brian Lindshield, Dr. Andrew Bennett)
- Joe Mocnik, Dean of Libraries
- Representatives from the Registrar's Office
- Representative(s) from the Department of Financial Services
- Library Financial Services
- Members from the Foundation, who coordinated the All In campaign with us.

Potential Barriers:

- Time- there are a lot of stakeholders and calendars to wrangle.
- Willingness- it is not a particularly fun topic of discussion and its much easier to say "ohh I wish we looked at that or had data on that" when it too late that it is to think proactively about what you want from a project.
- Data Availability- In a similar vein, for metrics desired for inclusion on the 10-year report do we have the data we need to generate it and if not can we find it?
- Facilitation- there will be a lot of voices and opinions on what is needed and what is most important for us to consider as we evaluate the success and the future of our initiative.

Questions/Issues I Need to Resolve:

- Where are we storing all of the project data which will inform what metrics we can

support calculating?
- Where should we be storing project data to ensure the success of the 15-year report?
- What direction is the initiative trending in? and How do we document these trends as they emerge for the benefit of the 10 and 15 year reports so there is non-traditional data should it be needed?

Desired Outcome(s)

- We convene and meet to decide on important metrics for assessment and the evaluation of success.
- We take good notes so that what is expected when I draft the FY 10 report.
- We take good notes so that what we want to see on the FY 15 report.
- We talk about the way to get the data needed for the desired metric and assessment at the 15 year mark.

3. Create and Curate Meaningful Resources for Grant Winners and Campus on OER

Attending workshops, presentations, conferences, and OER Librarian Certifications galore I am quite familiar with the principles of OER, available platforms, pools of existing resources, and other best practices. My colleagues in the library and the OATI Panel are in the same boat, but not all of campus has this mastery. To encourage people to apply for the grant, undertake the work, and create robust, engaging, and therefore hopefully more sustainable resource we need to ensure they have access to resources that get the caught up to speed on these topics, trends and tools.

SMART Goal:

By the end of summer 2022 have developed an Open Educational Resources Lib Guide with support from liaison librarians and faculty OER All-Stars to ensure it is accessible and meets creators and advocates needs.

Specific Steps I Can Take:

- Recruit liaison librarians, especially those who have a large number of faculty in their departments using or interested in OER, to help ensure the guide meets diverse needs and is navigable.
- Investigate other institutions OER lib guides to see how they organize content and resources.
- Revisit this course and the material I saved from it to add into the guide and use as a content jumping off point.
- Review K-State lib guide style guides and best practices.

Potential Collaborators & Resources:

- Liaison librarian coworkers.
- The library's Learning Education and Design team to help look at usability and attainment of guide standards.
- External department Learning Education and Design team to help look at tools and resources to suggest for making interactive, robust, and visually rich OERs.

- Partners in Student Access Services to provide accurate information on accessibility in OER creation, tips, tricks, and best practices.
- Faculty OER All-Stars who have expertise in building OERs to help add content and comment on the utility of the developing resource.
- Access to my LibApps account.

Potential Barriers:

- Willingness and time of my librarian colleagues, Student Access Services, and my OER All-Stars to dedicate to this.
- Time- the time to dig through existing guides, narrow down the most effective resources, and describe each resource.
- Use- faculty have requested this, but most faculty are used to pointing students to lib guides not using them much themselves.

Questions/Issues I Need to Resolve:

- Which OER all-stars should I reach out to and how do I get a representative sample across campus departments?
- What content is the most beneficial and how do I strike balance (adoption/adaption, principles, platforms, accessibility, finding existing resources, and etc.)?
- How do I thank collaborators for their time on this work?
- How do I encourage faculty to find and use this resource?

Desired Outcome(s)

- Contributing collaborators are contacted and their participation and deadlines confirmed.
- I add content to a guide and enter content submitted by collaborators to supplement it.
- The draft is approved with feedback from collaborators and a final optimal version is developed.
- The library learning experience and design team approves the guide.
- The guide goes public and is updated as needed.

4. Feature and Celebrate OER Movers and Shakers (OER All-Stars)

The Open Alternative Textbook Initiative is proud of its origins as a joint venture of library and non-library faculty. It is one of few non-library specific or initiated initiatives in part because of faculty who not only bought into the work quickly but also continue to give to the initiative and developed truly innovative resources. How do we encourage more of these OER All Stars to come out of the woodwork and how do we thank those that have already done so much? Without these movers and shakers, the program wouldn't exist and we wouldn't have raised over $500,000 to support it. Almost a decade in, the project needs to look at how we continue to give back to our OER All-Stars; these instructors' continuing involvement spreading platform tips, participating in reviews, encouraging colleagues to consider the switch to OER, ensure our program's success.

SMART Goal:

By the end of fall 2022 have convened a working group consisting of the core panel and some of our most energetic and repeat OER creators (OER All-Stars) to develop and start implementing ways to celebrate new OER and reward and incentivize OER activists who go above and beyond.

Specific Steps I Can Take:

- Scan project data for repeat grant winners and my inbox for acknowledged advocates to assemble a team to bring together on this topic.
- Coordinate and set an agenda for a meeting between these OER All-Stars and the OATI Panel.
- Explore incentives used by other institutions to reward their faculty and celebrate achievements.

Potential Collaborators & Resources:

- OER All-Stars across campus.
- The OATI Panel
- library administration
- university administration

Potential Barriers:

- The willingness and time commitments of OER All-Stars to participate.
- Defining gratitude is difficult. There could be a financial component but how else do we look at thanking people?
- library administration and university administration buy in to proposed efforts.

Questions/Issues I Need to Resolve:

- Is the OATI Panel open to more voices? Is an incentive space for more active involvement and opinions to be heard?
- Where does university administration view the work of developing OERs for its faculty or work supporting OERs? This helps look at how we formalize this working group for tenure benefits and opportunities this group explores related to advocating for OERs created to be counted towards tenure on behalf of our movers and shakers as a potential reward.
- What do we do with money that falls under the mission of the initiative? Is there interest in stipends to attend OER conferences or to support our All-Stars attending their field conferences if the topic of their presentation is their resource?
- Where are we sharing information about winners or their works? We used to list grant winners on the website and may return, where, how, and what are we sharing publicly about their work?

Desired Outcome(s)

- A working group is convened.

- The working group meets semi-regularly and finds an agreed upon communication tool to work through this task.
- A final list of mechanisms, efforts, and initiatives is developed.
- The group develops frameworks and timelines for implementing the mechanisms, efforts, and initiatives proposed.
- Mechanisms, efforts, and initiatives are deployed and continuously reviewed for effectiveness.

5. Bring Student Input and Activism Back into the Program

The Open Alternative Textbook Initiative would not exist how it does today without the support of the Student Governing Association which helped us establish the course fee in 2016. The course fee of course supports the initiative both by generating revenue to keep grants funded but also incentivizing faculty to get involved with using and building OER. While we have students attend each grant review, our communication and collaborations with them used to be significantly stronger and more plentiful. Students as we noted in the certificate coursework are some if not the most powerful advocates for OER. As we approach 10 years of existence it is time to bring students back more strongly into the fold as an expression of our gratitude and to ensure the continued success of our program.

SMART Goal:

By the end of spring 2023 have drafted an engagement plan working with the Student Governing Association focusing on the following areas: an exploration of ways to engage with student on OER advocacy, resource creation and advocacy K-State's use of open pedagogy, a collaborative evaluation on the OERs used versus commercial resources still in use at K-State, and a plan for how students can be more involved in the initiative and shaping the future of the initiative. This will be done with the aims of implementing the engagement plan and generating data based on the findings in the areas listed above.

Specific Steps I Can Take:

- Maintain communication with the Student Governing Association.
- Build stronger relationships with the Student Governing Association by staying appraised of their efforts related to the work of the library and the initiative.
- Working with them on a discussed project evaluating student's course material preferences broadly, which is just starting to get off the ground. This work could be part of getting the engagement plan communications flowing, and could be something revisited as a recurring study acting as part of the future engagement plan.

Potential Collaborators & Resources:

- Student Governing Association
- K-State Student Body
- OATI Panel
- Library administration and my coworkers by extension.
- Library Information and Technology Services
- K-State Information and Technology Services

● Qualtrics

Potential Barriers:

- Timing-Student schedules are especially busy and diverse making scheduling difficult at times.
- Sample sizing and survey development does the engagement plan have the potential for accurate surveying and does it ask appropriate questions?
- Comfort: how do I keep students comfortable working with such a diverse range of stakeholders and make space for them to feel comfortable and to ensure their voices are heard.
- IRB. If the evaluation plan includes data collection, the OATI Panel in collecting that data will need to submit an IRB request and consider the ethical consideration of evaluation mechanisms being employed.

Questions/Issues I Need to Resolve:

- How should I frame what is desired from the evaluation plan? Do we want or need a series of studies or should this take multiple different forms?
- How robust to studies need to be in the plan and what does post evaluation plan planning look like?
- How do we build in student perspectives to our existing workflow and metric gathering to ensure the time they are providing is mutually beneficial?

Desired Outcome(s)

- A working group between the many stakeholders (but namely the OATI Panel and Student Governing Association) is developed.
- The working group convenes regularly and a resource and expectations for communicating outside of meetings is established.
- An evaluation plan addressing the areas mentioned above is created as a product of this collaboration.
- The evaluation plan contains complete or the beginning stages of mechanisms for gathering metrics on the themes listed and a timeline for their implementation.

6. Chaperone the Creation of Robust Sustainable OERs

Moving forward the Open Alternative Textbook Initiative is requiring grant winners to use Pressbooks or Libretexts (with minor exceptions made on a case-by-case basis). Looking at supporting sustainable OER and providing the best tools to build OERs is an ongoing process that cannot be distilled into one iteration or repeated mirrored iterations. Part of starting to think of how we are supporting the creation of next level OERs faculty want to edit and continue to use and grow is listening to what faculty desire (in this case a love of Pressbooks but frustration with grading features like Libretexts and Adapt) trialing new tools and working with grant winners to evaluate them. This is just the beginning.

SMART Goal:

By the end of summer 2023 have a report drafted on the results of the Pressbooks LTI integration pilot and use/opinions on the gradebook integration and supplement with recommendations on whether to keep this tool, expand this tool, or drop this tool.

Specific Steps I Can Take:

- Coordinate the purchase of the integrations for inclusion on our next invoice.
- Turn on the features for K-State Pressbooks users.
- Work with colleagues to develop a study so we can accurately assess opinions on the tools.
- Be prepared to gather and access data from that study by drafting pilot participant requirements and an IRB request.
- Advertise the pilot program to grant applicants.

Potential Collaborators & Resources:

- Ryan Otto, my colleague in CADS and on the OATI Panel.
- Representative from Information Technology, our local Canvas expert.
- OATI Panel and Library Administration-who fund Pressbooks.
- Grant winners interested in the pilot.
- Grant winners participating in the pilot.
- Students in pilot courses.
- Qualtrics
- Pressbooks
- Canvas

Potential Barriers:

- Budgets, right now we are intending to pay for the LTI integration in perpetuity but budgets change so marketing needs to be careful.
- Budgets are also an issue in that if people really enjoy the gradebook pilot we would need to explore ways to extend its use which is costly and may not be possible. Unable to fund more users in the pilot the project administration demands increase as we need to make decisions on who can use the tool and who cannot.
- Management to make sure we stay within or pilot enrollment limits is time consuming and variable upon future student enrollment.
- Time-Ryan, Scott, and I each have a lot on our plates but see huge utility in this endeavor.

Questions/Issues I Need to Resolve:

- Is there enough OATI Panel buy in to support extra funds going to pilot participants in exchange for the extra work we will be expecting from them responding to surveys and administering student surveys?
- What do our surveys seek to ask and how do we frame the limited study accurately so that we aren't making false claims but also aren't spending money on areas that are not as beneficial as they were believed to be?
- How do we want to break down the two testing groups and spaces allocated in the pilot? How is this brought into the grant review process?
- What information to applicants who may be interested in participating need to know and how is the best way to get that information to them?

Desired Outcome(s)

- A study is developed, and desired metrics and an assessment framework is put in place.
- A study is launched in the upcoming cycles so there is data to analyze and compile for a summer 2023 report.
- A report is created and submitted on our findings.
- A supplement is provided with the report advising whether or not to explore ways to expand services which could include how to manage the access we have a the current price. It may even be that we advocate to remove both integrations for cost effectiveness which would also need to be stated.

7. Consider the Sustainability of our Program

In the summer of 2023, I will have written our Fiscal Year report which will be or will be used as part of a 10 year evaluation of our program. As I have mentioned, the early focus of the initiative has been growth. At this stage we need to be not only considering but rather prioritizing the future and longevity of our project. Other goals get us started on a similar train of thinking looking at how we are promoting the creation of sustainable OER, but we also need to look at how we make our entire program more sustainable so that it can continue to benefit K-State and products can benefit students at K-State and beyond.

SMART Goal:

By the end of Fall 2023 (10 years into the program) have developed a report assessing the current sustainability of our program with emphasis on: the sustainability of the platforms we support, the sustainability of our funding ($1 returns of course fee), and a comprehensive review on if the materials we create are in fact sustainable in our courses/departments.

Specific Steps I Can Take:

- Ensure an accurate 10 year report is generated.
- Ensure I provide access to all existing fiscal year reports to be studied and used as part of discussions.
- Ensure data since the beginning of the project is available and accurate.
- Coordinate meetings to talk about sustainability setting agendas and taking notes at each.
- Turning these notes into sections for a report.
- Co-writing this report with the OATI Panel.

Potential Collaborators & Resources:

- OATI Panel
- Library Administration
- University Administration
- Student Governing Association
- Foundation
- Library Financial Services

● Registrar's Office
● Department of Financial Services

Potential Barriers:

- Time- all of these stakeholders have insight to provide on this and it is all equally needed and important perspective.
- Group writing how do we delegate responsibilities so generating a tangible and binding project does not rest unequally on certain members.
- Willingness- sustainability isn't a favorite topic of everyone and it by nature forces us to celebrate our strengths but also not only acknowledge but address weaknesses or flaws.
- Willingness- a lot of the conversation will come down to money and talking about the need to set an accurate and realistic budget reflective of the amount we expect to stay stagnant at with $1 returns supporting our grants, and what to do when that changes.
- Needs how do we articulate and evaluate the needs of the program when stakeholders all interpret them a little differently.

Questions/Issues I Need to Resolve:

- What funding opportunities exist for the initiative after we spend the All In funds if any?
- What are metrics of success for our program and if/how does sustainability already play into them?

Desired Outcome(s)

- A series of convened meetings where all stakeholders provide input on the data and reporting we have and the role sustainability needs to play in our program in the future.
- A collaborative report accurately assessing aspects of our current program and areas it needs to improve on in the future.
- A report that includes timelines for enacting proposed enhancements that correlate to the areas for improvement noted.
- New metrics and areas for assessment directly correlated to sustainability.

A Final Note on Goals

K-State Open Alternative Textbook Initiative is very blessed to have existed for nearly ten years and benefit from such strong campus engagement and financial support. In light of this, rather than look at long term and short term goals, a noted weakness of our program we have managed to get away with because of our growth and buy in, I focused on how in the next few years we can address the gaps that exist. Our long term goal while broad is rather simple and is a reflection of our privilege: sustainability. That said, three areas of interest to me specifically I would eventually like to see the OATI Panel tackle should campus continue to follow the same OER trajectory include:

1. Explore and extend support for opportunities with Open Pedagogy at K-State.
2. Explore peer review opportunities for K-State OER, something being discussed on and off by the state of Kansas but could happen and be supported at a local level to start.
3. Develop and publish an OER about the history, policies, and strengths and weaknesses of the Open Alternative Textbook Initiative to help other programs interested in some of our features and trajectory.

These goals are less dire and as such I have had less time to develop them or explore areas for more tailored action items related to them. However, I look forward to moving through the seven areas and targeted SMART Goals above and developing ideas and subsequent SMART goals related to these three areas too. The Kansas State University Libraries is currently hiring a Scholarly Communication and OER Librarian. We are early in the interviewing process, but I am thrilled to revisit all of these goals as we start to share responsibilities for this initiative.

Program Timeline

I wear many hats as a Scholarly Communication and Copyright Librarian, and only one of them is OATI and OER support. Another reason I looked at shorter term goals in the next few years was because it helped me set up expectations I can submit to administration for what should be on my plate moving forward and how I can best serve the initiative in the immediate future. Each semester I work to create a tangible workable that supports the growth, sustainability, or improved administration of the initiative. Find below my timeline for getting the initiative up to speed. I spaced certain efforts out the way I did so repeat stakeholders outside the OATI Panel can avoid burnout and so there is space where the work is solely on my plate that would allow grace if other collaborations ran over their allotted time frame. The best use of my time is coordinating the meetings, connections, and work products to meet these deadlines. I included the scheduled regular maintenance needs of the project to both help me visualize what is needed during those more busy months ahead of time and to keep me honest. In addition to these short term goals, the more vague themes I'd like to explore and create evaluation/extended services on I have the following systematic checks and expectations I'd like to enforce.

- Bi-annual policy reviews on odd years.
- More robust five and ten year reporting consistent with patterns set up in the 10 year report. This keeps other fiscal year reports manageable but gives us benchmarks with more metrics to reflect back on.
- Annual stakeholder meetings with OER All-Stars invited to participate and explore ways to do work with us more closely.
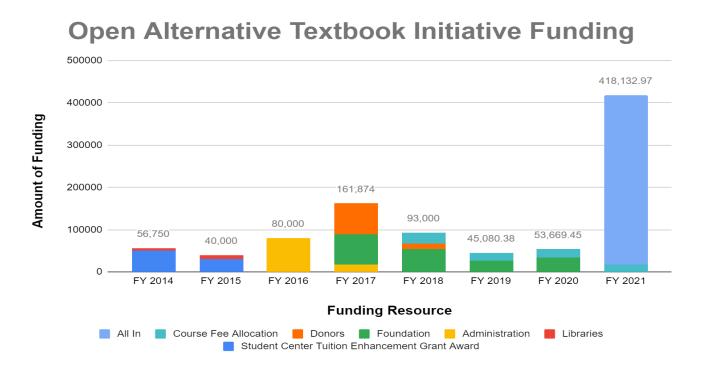
	2021	2022	2023	2024
Spring	*Participate in OEN OER Librarian Certification*	Examine and submit to the Registrar the February Course Fee Reporting of Summer/Fall 2022 courses. Conduct the April spring semester grant review. **Goal #2: "Coordinated a stakeholder meeting to ensure we agree on metrics to appear in a 10 year report on and evaluation of the initiative...and a plan for the same for the 15th year."**	Examine and submit to the Registrar the February Course Fee Reporting of Summer/Fall 2022 courses. Conduct the April spring semester grant review. **Goal #5: "Drafted an engagement plan working with the Student Governing Association …on student OER activism and assessment."**	Explore Extra Incentives for Courses that Implement Open Pedagogy and Provide Support and Tools for Open Pedagogy Efforts
Summer	*Participate in OEN OER Librarian Certification*	Write the Fiscal Year 2022 Report. **Goal #3: "Develop an Open Educational Resources Lib Guide…"**	Write the Fiscal Year 2023 Report. **Goal #6: "Drafted a report on the results of/opinions on the Pressbooks LTI and gradebook Canvas integration."**	**2025** Explore Opportunities for Creating a Peer Review Sociciation Process or System for K-State OER.
Fall	Conduct the December fall semester grant review. Work with student worker to reconcile all existing data. Edit the Standard Operating Procedure to reflect the policy changes implemented for the first time in conjunction with the All In Funding. Finish writing the Fiscal Year 2021 Report. **Goal #1: "Developed and submitted a proposal for how and where to create a K-State OER Library…"**	Examine and submit to the Registrar the February Course Fee Reporting of Spring 2023 courses. Conduct the December fall semester grant review. **Goal #4: "Convened a working group consisting of the core panel and some of our most energetic and repeat OER creators to develop and start implementing ways to celebrate new OER and incentivize and reward participants"**	Examine and submit to the Registrar the February Course Fee Reporting of Spring 2023 courses. Conduct the December fall semester grant review. **Goal #7: "Developed report assessing the current sustainability of our program and ways to improve it."**	**2026** Have Created an OER About OATI Reflecting on its History, Different Models, Policies Tried, Fundraising, Funding Models, Successes, and Weaknesses.

Budget and Resources

The Open Alternative Textbook Initiative has benefited from the financial support of a number of different K-State stakeholders. This budget has largely revolved around supporting the initiative directly but has been used to support resources in the past and will likely do so at a greater capacity in the future provided our successful All In campaign. To be transparent about how we have found our success and take note of the resources we have that facilitate our success, I have provided the most relevant information, our funding history, but also a breakdown of the human power that supports our project and the tools we do make use of in our efforts and who pays for those.
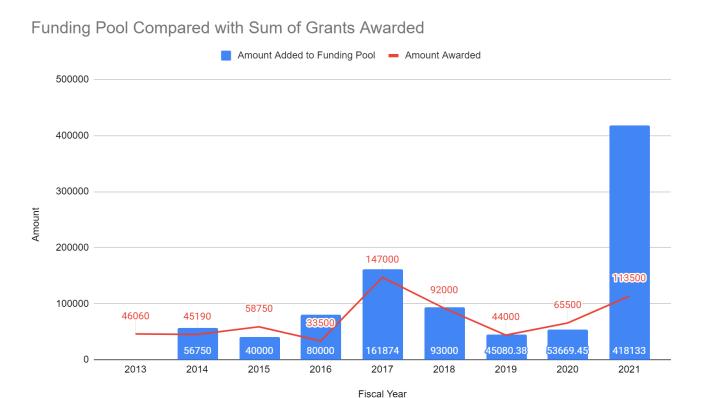
Funding History

Find below a graph depicting the history of Open Alternative Textbook Initiative Funding Resources since its inception in 2013-2014. Note our funders have included: the libraries, gifts from the Foundation (distinct from the campaign funds they helped us raise), the course fee returns/allocation, Administration namely allocations from the Provost specifically (listed as Administration) but also through more direct initiatives noted separately including the Student Center Tuition Enhancement Grant Award,from donors outside of the Textbooks 2.0 campaign, and of course from All In.

Open Alternative Textbook Initiative Funding

For the last couple of years the project receives anywhere from around $13,000-$18,000 between Fall, Spring, and Summer course fee returns. This amount is slated to increase as All In has brought attention to our project and as more projects are funded with our vastly increased pool of grant money. The trick moving forward will be 1) ensure we promote sustainable grant funded material to reduce incentives to move away from and drop OERs to move back to commercial resources and 2) enjoying the ability to fund more projects in the short term but planning long term on a more stable annual budget watching where that course fee return shapes future cycle's budgets. Our donation account remains open and the Foundation intends to update donors and solicit donations regularly over the next several years, but it is easy to see that even planning to run two $30K cycles per year depletes funds quickly even if the loss is more like $40K not $60K with the course fee allocations. To help illustrate this view the graph below comparing the amount spent funding grants per fiscal year as compared with new funds allocated to the initiative each fiscal year. To make optimal decisions on funding Emily receives financial updates on the

account's status quarterly. This information is consulted before review cycles and a target amount +/-$10,000 (2 grants) is set and stated to the review panel in opening the review session. *Please feel free to contact cads@ksu.edu if you would like more details on OATI financial history, fiscal year breakdowns, and money in vs. money out.*

Funding Pool Compared with Sum of Grants Awarded

Legend: ■ Amount Added to Funding Pool — Amount Awarded

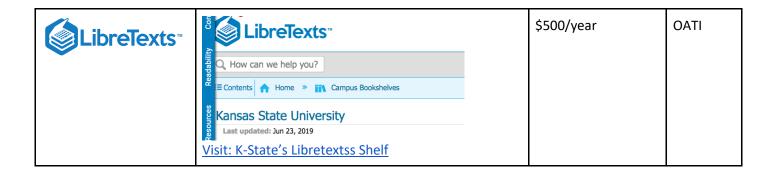| Fiscal Year	Amount Added to Funding Pool	Amount Awarded
2013		46060
2014	56750	45190
2015	40000	58750
2016	80000	33500
2017	161874	147000
2018	93000	92000
2019	45080.38	44000
2020	53669.45	65500
2021	418133	113500

Human Resources

The Open Alternative Textbook Initiative is fortunate in that thus far none of our funding has needed to be allocated towards paying for its administrators; their paychecks are supported through other units on campus with various expectations on their engagement in this work. While this is great for allocating the maximum amount of project resources to grants or tools, it does complicate the stakeholders' day-to-day jobs as they are forced to balance job functions, a bulk of which are allocated to work other than the project. I do not have exact breakdowns but I have provided the areas in which the institution allocates staff and time to the initiative and relevant information I have on their role which can be used to consider how much time annually they contribute to the work done on behalf of the initiative. Names have been redacted if they aren't publicly acknowledged and listed on the website as stakeholders only because I did not have permission to share this information **NOT** because they are not providing vital services.

Institution/ Stakeholder Group	Unit	Name/Title	Function
K-State Libraries	Academic Services and Center for the Adancment of Digital Scholarship (sub-unit)	Academic Services Department Head	Communicates between myself and upper administration, supports and directs my efforts broadly and therefore in relation to my work for the initiative.
		Emily Finch (Me)	I serve as the primary administrator of the initiative serving on the panel and handling the oversight of the day-to-day. Lately this has been 50% + of my job where half of my time is to be dedicated to Copyright, licensing and open access reference and instruction, and half of my time is dedicated to this project, our Open Access Publishing Fund, our Digital Press and other scholarly communication topics.
		Emily's Student Worker	Over 60% of my student worker's time is dedicated to providing me with support on the administration of just this project.
		Ryan Otto	Serves on the Panel and provides reference, platform, and policy enforcement, and inquiry triage support for this project as needed.
		Future Scholarly Communication and OER Librarian	This project and related OER efforts will account for approximately 75% of their work; they too will serve on the Panel (allowing me to gradually wean away from commitment to about 20% on this project).
	Library Financial Services	Person 1:	Coordinate the allocation of the course fee to departments, coordinates the payment for the tools and resources that support the project (out of the project and the library budget), and generatees fiscal year financial reports for me to use in the compilation of the Annual Fiscal Year Report.
		Person 2:	Coordinates the two halve payments for recipeients of OATI grants.
	Administration	Associate Dean and Dean of Libraries	Provides oversight and shapes the libraries role in the project. The Associate Dean meets with other Associate Deans across campus to communicate policy changes and shares announcments and upates on the initiative. The Dean speaks with University Administration on the project on behalf of the Panel.
	Other Library Faculty and Staff	Liason Librarians, User Services, Communications and Marketing	Communications and Marketing help manage the website and create graphics and flyers that support the growth of the initiative through information sharing. Our user services and liason librarians help faculty find out about the project and help suggest information and resources to use in the development of their grant proposals.
Remaining OATI Panel	Department of Mathematics	Dr. Andy Bennett (Department Head)	Co-Founder and member of the Panel. Builds relationships and connections across campus and with the Kansas Board of Regents provided the history of their invovlment with this project. Participates in administrative decision making, outreach, and answers questions on open/alternative resource development.
	Department of Food Dietetics Nutrition and Health	Dr. Brian Lindshield (Associate Professor)	Co-Founder and member of the Panel. Builds relationships and connections across campus and with the Kansas Board of Regents provided the history of their invovlment with this project. Participates in administrative decision making, outreach, and answers questions on open/alternative resource development.
Registrars Office	K-State Campus	Registrar	Applies the course fee logo and framework for courses to receive the fee in the course catalog. Data submitted to them every September for Spring Classes and February for Summer/Fall Classes.
	Salina Campus	Registrar	Applies the course fee logo and framework for courses to receive the fee in the course catalog. Data submitted to them every September for Spring Classes and February for Summer/Fall Classes.
Division of Financial Services	Finance Personnel	Fund Balancing/Systems Team Member	Works with the registrar to coordinate the billing of the course fee for courses noted in the catalog. Data submitted to them every September for Spring Classes and February for Summer/Fall Classes.
The Foundation	Philanthropy/Communications	Donor Specialist	Worked with the Panel to develop the All In Textbooks 2.0 donation campaign. Now they meet with us semi-regularly to get updated data and talk about future communication strategies and needs for reaching donors moving forward.
Student Governing Association	Student Representatives	Student Representatives	Provided content to contribute to the All In campaign; multiple representatives attend our grant reviews twice per year in December and April lasting about 1.5 hours each.
Academic Departments	Various faculty, staff and instructors.	OER-All Stars	These OER All-Stars already developed OER to reduce costs for K-State students, but also were called upon to contribute to the marketing for the All In campaign and are asked to attend grant reviews twice per year in December and April lasting about 1.5 hours each.

Platforms and Resource Costs

Another factor in the Open Alternative Textbook Initiative's ability to keep costs low is the only recent use of funds to support platforms/tools. The decision to make use of funds in this way resulted from the success of the All In campaign and the pressures placed on the libraries budget to support platforms which will be used at an increasing rate by an increasing number of grant applicants as the initiative grows. The library pays for the cost of running New Prairie Press where some OATI winners opt to publish their ebooks and the related cost of purchasing ISBNs for this material. The library used to pay for Pressbooks at a lower rate for a lower tiered plan on its own but as the demands for space on the platform and for the exploration of new platform features that support instruction increase the library and initiative have started sharing costs on that resource. Books created on Pressbooks are encouraged to publish with New Prairie Press formally since the end products are so nice and it can provide the author metrics on the dissemination of their OER. In 2020 members of the OATI Panel discovered and were drawn to Libretexts. Impressed with its functions the OATI suggested and decided to use course fee allocation dollars to support a membership with them to give faculty another choice of K-State and OATI supported OER creation platforms. Moving forward I have proposed the goal that the Initiative try not to dip into funds for platform support outside of the equivalent cost of two grant projects ~$10,000. This way, when we return to an economy of scale adjusted for All In's impact but without the All In pool of funds, the costs of supporting platforms does not outweigh benefits now at peak funding. Based off costs explored in more detail below, OATI has committed $4,000-$5,000 depending on other library funding factors and renewals for the foreseeable future. This means we could continue to explore new tools if we believe they offer significant utility, but if we can keep the costs as low as one displaced grant/ year that is clearly better than two.

Platform	K-State Instance	Cost	Who Pays?
bepress™	NEW **prairie** PRESS *open access scholarly publishing* Visit: New Prairie Press	I am not privy to our exact contract and price needless to say digital commons normally costs $xx,xxx fiv figures annually.	Library
PB PRESSBOOKS	New Prairie Press Open Book Publishing Open Textbooks Adapted and Created by Faculty at Kansas State University Vist:New Prairie Press Pressbooks	$8,500/year which includes memory, LTI Canvas integration and 500 person gradebook integration pilot.	Library and OATI Split

		$500/year	OATI
LibreTexts	LibreTexts Q How can we help you? ☰ Contents 🏠 Home » 📚 Campus Bookshelves **Kansas State University** Last updated: Jun 23, 2019 Visit: K-State's Libretextss Shelf		

The other resources used to effectively administer the Open Alternative Textbook Initiative for Kansas State University are free or by default absorbed by the institution and include:

- Outlook email addresses with the option to add colleagues' calendars from directories, one drive, and Microsoft Office online.
- Google Drive and Google Docs which is used to hold documentation, templates for grant reviews, and shared files.
- A StaffNet page to keep documentation and both financial and fiscal year reports.
- Qualtrics to host our grant application and course fee data collection survey.

Outreach and Communication Plan

Outside of word of mouth the OATI attracts applicants in a variety of ways. Many of our materials were created through the K-State Libraries Marketing and Communications division, but the Foundation, and Central Administration's Marketing and Communication have worked to create advertising of practical content (like the course fee logo) with us in the past. Other advertising happens on the OATI website, through campus circulars and newspapers, through the OATI Canvas a place where past and current recipients interact and find resources, and through other channels. Outreach plans need to be re-evaluated post All In and policy changes to ensure campus understands our initiative and feels comfortable engaging with us.

All In Campaign

Distributing resources and successfully marketing philanthropic giving during a pandemic is no easy feat and our results speak volumes on the support OATI has for its work and presence on campus. The OATI Panel could not have done this alone and below are examples of some of the many resources and special publications created during the All In that may be helpful for other programs looking to develop campaigns to raise funds to support or start grant initiatives. This is powerful information to turn back and see if we can recreate given we know it is successful at garnering support for our project within the K-State and Manhattan, Kansas community.

The OATI Website:
https://lib.k-state.edu/services-support/scholarly-communication/open-access/textbook-initiative/#:~:text=The%20Initiative%20provides%20grants%20between,using%20open%20or%20alternative%20materials.

An OATI Foundation's All In Campaign Piece:
https://ksufoundation.org/AllInforKState/Stories/Moorberg.html

The OATI Foundation's All In Campaign Site:
https://allin.ksufoundation.org/

The Collegian, the K-State Weekly Newspaper:
https://www.kstatecollegian.com/2021/03/18/textbooks-2-0-focus-of-2021-all-in-for-k-state/

Daily Circular "K-State Today"
https://stories.ksufoundation.org/today-save-students-money-on-textbooks-and-go-all-in-for-k-state-and-textbooks-2-0/

Link to Slides Prepared for Scheduled Information Sessions:
https://docs.google.com/presentation/d/10BGPkm0gtMtVdQbLiqKL-8VAeYO3ilxQNUWDgSKeVCk/edit?usp=sharing

Course Fee Outreach Strategy

The course fee expectations were perhaps the greatest and most stressful changes made to the initiative in the last year. To ensure OATI has good data, but more importantly to ensure students are not overbilled and the correct campuses are billed an overhaul of the system needed to occur. A number of ideas and iterations were explored including a biannual syllabi submission and review for proof of course fee and course fee renewal. We settled on the removal of the application for the fee due to copyright and academic/intellectual freedom concerns and switched to a course fee data reporting model to be used for all courses seeking the fee, new to the fee, as tied to grant projects, and repeat fee seeking courses. This model was made to adapt to the needs expressed by the Registrar's Office and Financial Services Department. To emphasize the importance of this data and the workloads it disrupts when it isn't submitted or is submitted late, we gave the OATI some teeth and declared if the fee isn't reported by the two annual dates (September for spring classes and February for summer/fall classes) the fee is lost until the next term. This increases the stakes and interest in OATI policy more than it ever has previously. Our approach for effective fee outreach is six fold.

1. Keep the website updated with Communications and Marketing-- this means the course fee data reporting dates are updated and we ensure the surveys are labeled and working at all times.
2. Keep the OATI Canvas Course Updated-this means the dates are updated and we ensure the surveys are labeled and working at all times AND that a flyer explaining the policies and purposes is shared under the initiative resources module is posted, and a discussion topic on suggestions to improve course fee administration and management is posted and monitored.

3. A K-State Today announcement is pushed through Communications and Marketing two weeks prior to the final deadlines in August and January respectively.
4. Course fee allocation reports with totals generated by the department are shared with department heads and the associate deans of our colleges. These reports contain date reminders for the next upcoming data collection and can be used to incentivize faculty and administration to push for courses to switch to open/alternative material to get the fee for their unit.
5. Information sessions to find out more about the grant, fee, and Open Alternative Textbook Initiative more broadly are offered more frequently throughout the fall and spring semesters rather than clustered only around the application deadline; these sessions are advertised through K-State Today and on the library event calendar with the help of Communications and Marketing and posted about on the OATI Canvas.
6. Expectations on maintaining the fee and the dates of data collection are shared at the beginning of all OATI events (workshops, information sessions, grant review sessions).

OER Grant Outreach Strategy

Grant expectations were not untouched by policy review and All In pressures, however we have been inching towards a stronger OER focus for years. The signing of MOUs and inclusion of creative commons licenses on grant efforts was not questioned during the first two rounds of implementation last year, but backlash is more likely now that we are not suggesting platforms after grant acceptance, but instead as a condition. The OATI has significant pockets of grant creation density in certain departments and has a number of repeat applicants. With the new pool of money we also decided we are no longer looking to fund second + editions of previously funded work. The website has been updated to reflect these policies but a more strategic outreach strategy is needed to both optimize communications on the OATI grant and to ensure a better, more diverse future for it. The following steps will be taken to address gaps in grant outreach:

1. The website will be regularly updated with Communications and Marketing-- this means the grant application dates are updated and we ensure the survey is working at all times.
2. The OATI Canvas Course will be regularly updated-this means the dates are updated and we ensure the surveys are labeled and working at all times AND that a checklist on the steps needed to complete grants and opportunities to publish and disseminate grant projects is shared under the initiative resources module. Furthermore, Pressbooks and Libretexts troubleshooting discussion threads will be started to encourage people to post in them.
3. Platform workshops will be hosted each fall and spring semester. These will be advertised through the Canvas Course, and both added to the library event calendar and announced through K-State Today by Communications and Marketing.

4. A K-State Today announcement is pushed through Communications and Marketing two weeks prior to the application due dates for both cycles in November and March respectively.

5. Information sessions to find out more about the grant, fee, and Open Alternative Textbook Initiative more broadly are offered more frequently throughout the fall and spring semesters rather than clustered only around the application deadline; these sessions are advertised through K-State Today and on the library event calendar with the help of Communications and Marketing and posted about on the OATI Canvas.

6. Fiscal year reports and will be consulted with particular attention drawn to departments represented. An OATI informational flyer will be recreated with updated and accurate information annually and offered to liaison librarians for distribution throughout the year. Liaisons to departments with the lowest number of grants awarded will be contacted more directly to explore how the OATI Panel can support more targeted communication with that department on the initiative.

New Ideas in Marketing and Communication

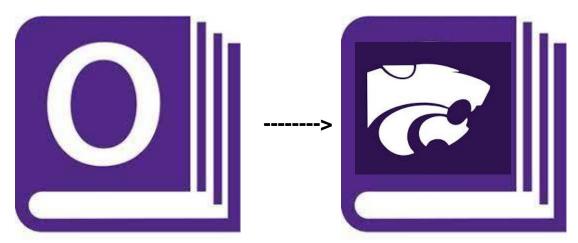### Areas for New Communication: Not Pitches--Playing Ball and Bringing Stakeholders onto the Field

One benefit of existing for ten years is most of the pitching for and to stakeholders has already been completed. It does mean that we are done playing ball with stakeholders and instead need to continue to engage with them in new and creative ways to advance projects. This has been a difficult mindset to adjust to especially since I was the newcomer to the project, a project campus was very aware of, but now I am the expert and it's time for the project to grow and develop in new and engaging ways. Areas I hope to explore (some reflected in SMART Goals) include:

1. Explore partnerships with students to bring them into a more active partnership with the initiative. Build relationships with students using the history of the partnership developed between us, and then use these relationships to collaborate on perception and opinion assessment across the student body. These results can be used to shape future initiative goals and to assess the successes and weaknesses of the work being developed out of our initiative.

2. Explore partnerships with Information Technology and Learning Experience and Design teams internal and external to the library to encourage faculty to spend time building more accessible and robust OER they are more inclined to update and continue to use/reuse.

3. Gather past grant recipient feedback on if they are still using their resources and how they feel about the tools used to create the resource to help pitch to university administration areas they should explore subsidizing platform and tool costs and to inform conversations and a study on the sustainability of our program.

4. Partner with the OER All-Stars who created innovative groundbreaking OERs (an annotated bibliography that curates content and avoids violating copyrighted content or a field guide that can be used by the public and supports our land grant mission) to talk about the added benefits of creating OER and what it can do to support not only course specifics but your advancement in your field.

5. Explore recruiting these OER All-Star individuals and their unique works to create a task force to talk to university administration about the role OER creation plays in tenure deliberations and research and creative work.

6. Maintain relationships with the bookstore to prevent campus from moving to an inclusive access model but also on ways to collaborate. Where can they hand out promotional material so students know to look in the course fee logo in the catalog nextime, and where we explore local on campus print on demand opportunities to generate income for the university but on a per need basis where students are in control of their textbook spending.

Marketing

One outreach and communication flaw noted that finally is able to be a topic of discussion with a targeted push to creating more specifically OER content, is the issue of the OATI course fee logo. The "O" on a book has confused many with connotations of open as related to open access. And while that is a relationship between OA and OER, the alternative nature of some of the products supported by the initiative makes this problematic ethically as students may think they are paying for open content when they may not be using it and in ensuring campuses have an understanding of scholarly communication terminology. The following change to the logo has been proposed to reconcile this and to celebrate K-State's commitment to affordability.

We think the use of our logo on the book instead accomplishes both of these aims.

Evaluation and Assessment Planning

Baseline Metrics

For at least three quarters of the existence of the Open Alternative Textbook Initiative we have created fiscal year reports that show our interest in metrics and assessment. However due to lack of documentation and discussions about metrics and assessment the reports are inconsistent in what they report, how they report it, and at times conveying why they chose to report what they did. A great deal of time was focused on creating predictions with often unclear and inconsistently applied predictive models. Furthermore qualitative data and reporting is not used to its fullest capacity and there is not a standardized section on reporting for questions posed about the administration of the initiative or policy changes made and reasons for them. Furthermore, assessment on sustainability has remained absent in lieu of making space for repeated often near duplicate metrics of growth. Moving forward all of the following baseline data exists and will be collected with the intent that it is manipulated and mapped to assessment. The tools used to get this data (Qualtrics data reporting surveys and grant applications are included in the appendices below).

- Amount of money awarded each grant cycle.
- Number of grants awarded each cycle.
- Anticipated student savings per grant cycle.
- Departments represented in grant applications.
- From 2016-onward: the Fall, Spring, and Summer amount allocated to each department.
- Departments represented in course fee use.
- Anticipated student savings per course fee allocation.

C.O.U.P Framework and Developing New Meaningful Metrics and Assessment

The Open Education Group's COUP framework for evaluating the impact of OER is walked through below. I used this scaffolding in an attempt to help me find and petition new ideas/areas for metrics and assessment which will be required for improving fiscal year reporting and directly tie into one of my SMART Goals. COUP comes with an existing set of metrics which I have listed in bold if the initiative already collects, but I found it more helpful to look broadly at the themes and related questions I tangentially to come up with my own COUP-esque series of metrics to explore.

C: Cost

- **Cost of material previously assigned (asked in grant application).**

- Cost of platforms to support the initiative.
- Cost of labor, how much manpower and how many hours are dedicated to the initiative's administration. Is that cost justified in comparison to their other responsibilities?
  - If not, how does the initiative need to address this (broaden panel membership, cut back review sessions and information sessions, petition the university to cover costs for hiring more or compensating existing stakeholders)?
- Technology costs, and equity issues associated with these costs, when digital materials are required.

O: Outcomes

- How have graduation rates changed since 2013 and how could this be a potential outcome of our initiative?
  - How can we poll students to get perspective on this area?
- How are grades trending in courses offered year to year with implementation of these resources or across sections using different materials?
  - How do we submit and IRB and code for the first part?
  - How do we look at new applications and potentials to build studies on the second part?
- How do faculty consider OER building as a reflection of their academic freedom?
  - How do we effectively poll faculty on this area?
- How do students see open pedagogy and open educational resources supporting learning outcomes in relation to commercial material/traditional instruction?
  - How can we poll students to get perspective on this area?
- Does seeing the OATI course fee in the course catalog influence which courses students enroll in and to what extent?
  - How can we poll students to get perspective on this area?

U: Usage

- How well do faculty at first glance recognize the terms of open licenses on OER content?
  - How do we effectively poll faculty on this?
- How well do faculty understand what they can do under the terms of an open licenses on OER content?
  - How do we effectively poll faculty on this?
- How well do students at first glance recognize the terms of open licenses on OER content?
  - How do we effectively poll students on this?

- How well do faculty understand what they can do with their assigned OER under the terms of an open licenses on OER content?
  - How do we effectively poll students on this?
- How do faculty search for and find OER to adopt and adapt?
  - How do we learn this?
- How do faculty provide students with access to OER?
  - How do we learn this?
- Are any classes employing open pedagogy on campus?
  - How do we learn this?
- What do faculty know about open pedagogy?
  - How do we learn this?
- Are faculty interested in creating classes run by open pedagogy?
  - How do we learn this?
- Do students know what open pedagogy is?
  - How do we learn this?
- Are students interested in classroom opportunities that engage with open pedagogy?
  - How do we learn this?

P: Perceptions

- Do students prefer OER material over commercial material? Why?
  - How do we effectively poll students on this?
- Do faculty think students learn better with commercial materials or OER?
  - How do we effectively poll faculty on this?
- Do faculty think the teach better with commercial materials or OER?
  - How do we effectively poll faculty on this?
- Do students feel they learn better with commercial materials or OER?
  - How do we effectively poll students on this?
- What does administration think of OER?
  - How do we learn this?
- What does administration think of OER in relation to research and creative work and tenure/promotion?
  - How do we learn this?
- Where does the library top down see its roll in supporting OER?
  - How do we learn this?
- Does campus think we are running the Open Alternative Textbook Initiative well?

- - ○ How do we learn this?
  - Do stakeholders think we are running the Open Alternative Textbook Initiative well?
    - ○ How do we learn this?
  - Do stakeholders think we are running the Open Alternative Textbook Initiative sustainably?
    - ○ How do we learn this?
- What do donors want to know more about OER?
  - ○ How do we effectively poll donors on this?
- What do faculty want to know more about OER?
  - ○ How do we effectively poll faculty on this?
- What do administrators want to know more about OER?
  - ○ How do we effectively poll admin on this?
- What do students want to know more about OER?
  - ○ How do we effectively poll students on this?

SWOT Analysis of the Open Alternative Textbook Initiative at Kansas State University

The following SWOT analysis is an expanded version than one done several months ago.[4] Adding this into the action plan and reading it first inspired (clearly) my SMART Goals and other areas of this plan and finishing with it allowed me to think about what lingering ideas and questions remained at the forefront of my brain when I think about OATI systematically and where they should be added (strengths, weaknesses, opportunities, and threats).

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[4] My work is based on that of Example of SWOT Analysis by the Open Education Network licensed under a Creative Commons Attribution 4.0 International License.

Strengths	Weaknesses
Faculty led initiative. Faculty partnered with library faculty to start and build our initiative and that is how it has remained and grown. (AKA buy-in is strong)	We don't have clear metrics of success outside of the OTN/OEN calculation for savings. We need more.
The OATI has a demonstrated track record of saving students over 6.8 million since the inception of our program in 2013.	Data has been collected inconsistently for years.
	Metrics have been reported inconsistently for years.
OER grant has created invested faculty champions eager to work with other faculty across campus to make OER work. Using these OER All-Stars especially the ones with incredibly unique and transformative OER is vital for continued buy in; diverse buy in; and long run success.	Outside of providing grant funds and assigning a fee for $0 course material courses we do little advocacy or education as an OER effort.
	Education and promotion is for grant success or generating department revenue not for changing the market In education-- a mixed message and missed opportunity.
Our faculty needs to partner with our OER All-Stars more frequently and at deeper levels.	We don't gather metrics on reception from students, faculty (after we get one report from the first semester of implementation) and other stakeholders.
Faculty has academic freedom and can choose material for their courses.	
	We often ignore the stakeholders that help make the project possible and deprive them of the material they need to support the initiative and do so in a way with work balance in mind.
Faculty show their commitment and support to affordability when switching to OER.	
Admin, faculty, staff, the library, students (speaking out against TopHat and reviewing applications for the OER grant), and donors are all vested in this project.	We focus on a grant and a "fee" for free courses but not on actual OER and sustainability.
	We are potentially disincentivizing a E Reserve system in the library because it would endanger the $10 fee.
The Library funds or splits the cost of OER publishing tools and platforms and pays the salaries of workers who administer this initiative.	Panel/leader time is divided and there is too much on too few plates.
	Students made the initiative possible but we only collaborate minimally with them in the present.
	We don't explore student partnerships which could provide us with excellent publishable data that shapes the program.
	There is no focus on sustainability, only growth.
	There has not been Standard Operating Procedures drafted or good documentation developed so succession issues set the project back.

Opportunities	Threats
Kansas as a state is exploring opportunities to grow and work together on OER initiatives including OER peer reviews. Engagement with them will be vital for future success AND we have a lot we could help our peers with.

Reward our faculty champions provide a scholarship application for them to gain funds to present their work/story at OER conferences and subject area conferences.

Now that we have solid funding $400,000+ we should focus on the advocacy and support we vitally need to ensure continued success and sustainability.

Find ways to showcase faculty excellence including a K-State OER library that is available for the world to see and benefit from.

Move away from "alternative" and focus on funding tried and true OER.

Hire more staff/faculty to support. I love my work but the administrative burden is severe. With a strong advocacy wing of the program can be created and sustainability prioritized.

A Teaching and Learning Center professional development course on building OER mirroring colleagues Canvas Courses required before receiving grant funds could prove beneficial.

New funding and an approaching 10 year anniversary mean we have to take the time and make the space to develop solid metrics and assessment to continuously review ourselves for areas of improvement. | If we don't better define "Alternative" in our title "Open/Alternative Textbook Initiative OATI" we risk openwashing" and "openwrapping."

Poor reporting both in terms of inconsistent administration and in terms of low participant expectations/commitment prevent us from getting the data we need to make the project and its funding viable, sustainable, and marketable to financial stakeholders and university administration.

We have focused too hard and too long on growth which has hurt us tremendously; if we don't switch to a focus on sustainability the project will not continue to make an impact and it certainly won't survive.

Our low expectations or lack of expressing our "goals or ideals" in grant applications mean we aren't always getting projects of the same quality which means a) they aren't going to be sustainable, b) others may reject suggestions because of what colleagues got away with and c) may reduce participation long term if people feel unsupported/unable to live up to expectations or create sustainable material.

Our accessibility documentation hasn't been updated in a long time because we haven't reached out to Student Access Services to work on updating in and accessibility concerns are not prioritized during grant application review which means some students might not be able to use the material created for them. |

Acknowledgements

I want to thank Elaine Thornton, and the other OEN instructors as well as the Drifters Cohort first and foremost for making this action plan possible. I came into this certificate program frustrated and I am leaving grateful and inspired. I now have so many resources to integrate, questions to ask, and new studies to propose related to OERs and my work on the Open Alternative Textbook Initiative. Thank you to other cohorts who contributed to the course and who I got to meet at the broader events. Please reach out if you think of ways to collaborate in the future or if I can provide any information about the OATI.

Appendices

Key Dates and Timeline For Administration:

Event	Date
Summer/Fall Term Course Fee Reporting Closes New and Continuing Courses Apply.*	On the first Friday in February, applications for the fee will be reviewed; the registrar needs data by mid February.
Spring Grant Cycle Ends	On the third Friday of April, applications are due.
Spring Term Course Fee Reporting Closes New and Continuing Courses Apply.*	On the first Friday in September, applications for the fee will be reviewed; the registrar needs data by mid September.
Fall Grant Cycle Ends	On the first Friday of December, applications are due.

Course Fee Applications will close at least a week before the registrar publishes the class schedule.

Appendix B: Qualtrics Questions for the Application for the Grant

*denotes required field

1. Name(s) *
2. Your title *
3. Department *
4. Your email address *
5. Phone number
6. Course name and number *
7. Number of students annually enrolled in the course *
8. What textbook(s) are you currently using or would use for the class? (List title/author.) *
9. Estimate the amount spent annually by a K-State students on book(s) or course material(s) in your course. * (Please provide a total dollar amount only without explanatory information, e.g., 75.)
10. Please rate the significance of each of the following factors in you desire to create an Open/Alternative Resource by sorting the following principles. (Primary Concern/Secondary Concern/Not a Concern)
    a. feasibility,
    b. affordability
    c. interactivity
    d. gap in existing materials
    e. tailor content to my course
11. Feel Free to Elaborate
12. Amount requested *
13. Name of Department Financial Contact*
14. Department Financial Contact Email*
15. What is name and account number for the Foundation Account that funds would be transferred to if awarded?
16. Upload your proposal. For more information, please review the requirements.
17. By agreeing, I declare that should I receive an OATI grant I am aware of the following requirements:
    f. to receive my payments, I will be required to sign the OATI Memorandum of Understanding (MOU) and comply with its terms. (link to MOU here)
    g. I affirm that I will use these funds to support the adaption or creation of an open resource that will be freely available to K-State students.

Appendix C: Qualtrics Form for Course Fee Management (A duplicate survey exists for the September implementation for upcoming Spring Courses).

*denotes required field

1. Email of person submitting survey: (copy of responses sent here)*
2. Optional additional contact for proof of reporting: (copy of responses sent here)
3. Department*
4. Name of Instructor: (If all sections use the fee one instructor representative can be selected as representative.)*
5. Email of Instructor*
6. Course Number (ENGL 123)*
7. Do all sections use this resource?*
    a. Yes
    b. No; If no: Please list each section that uses the resource (ENGL123A, ENGL123C)*
8. Semesters Taught (Select all that apply):*
    a. Fall
    b. Spring
    c. Summer
9. Campus* *(select from list of our campus/remote options)*
10. Select the most appropriate status of this data reporting:*
    a. This is the first time I am seeking the Course Fee for this course.
    b. I am seeking the Course Fee for the first implementation of my OATI Grant this Semester.
    c. Neither of the above. This course has used the Course Fee before.
11. I certify that this course is one that needs course materials ex: books, podcasts, videos, journal articles and the like (practicums, exercise classes etc. are not eligible).*
    a. Yes
    b. No
12. I certify that this course does not have any required or recommended course materials that students must purchase.*
    a. Yes
    b. No

Appendix D: New (8/30/2021) Criteria for Grant Applications

Acceptable resources
The development or adoption/adaption of open resources might include any of the following or a combination:
- An existing open access textbook
- An existing Open Educational Resource (OER)
- Faculty-authored materials
- Any Creative Commons or other publicly licensed material (TedTalks, YouTube videos, Wikimedia Commons, etc.)

The below materials are not eligible for funding:
- Commercial e-text versions of an existing print textbook
- Textbook rentals
- Existing textbook alternatives already in use by faculty; retroactive funding is not available.
- Modifications of existing textbook alternatives already in use by the applicant will have low priority, but may be funded in special circumstances. OATI is no longer able to support revisions or new editions of previous grant funded projects with its 10% of course fee returns. Parties interested in compensation for versioning should reach out to their departments.

Applications will be reviewed by a panel consisting of teaching faculty, representatives from K-State Libraries, student representatives, representatives from the Student Access Center and past textbook initiative awardees.
Winning proposals will be based on:

Viability
·   **The quality of the application and proposed resource is considered.**
·   **The ability for the resource to be implemented in a reasonable time-frame is considered.**

Utility
·   **The quality of the intended product is reflected in its ability to actively engage students in the learning process**
·   **Offers a potential for savings for K-State students.**

Sustainability
·   **Resources are openly licensed with the creator's choice of public license.**
·   **Resources are created with Pressbooks or Libretexts. Limited case-by-case exceptions for equally robust and stable resources on platforms with equal creation and dissemination abilities will be made (learn more about platforms below).**
·   **Resources are editable and able to adapt to changes in course material/needs and are built with tools that facilitate this.**

Accessibility
·   **The material meets accessibility standards that ensure all students are able to use the resource. Visit the Student Access Center or Digital Accessibility in K-State Online to learn more.**

The Open/Alternative Textbook Initiative (OATI)
Kansas State University
Memorandum of Understanding

[Course Name Here]
This memorandum of understanding (MOU) outlines expectations and conditions for participation of OATI grant recipients. The agreement is between [name of individual(s)] and the OATI review panel with the objective of creating a quality open or alternative educational resource with funds provided for that purpose.
Amount Awarded: _____
Financial Contact Name: _____
Financial Contact Email and Phone Number: _____
Account Name: _____

I. Author/creator expectations

● Grant Recipients agree to meet all agreed upon deadlines or offer as much notice as possible if an extension is required.
● If, for any reason, an author needs to terminate the project, the author will immediately notify the team members and funding will be suspended. In this event a report on the progress made and reason for cessation will serve as the final product in fulfillment of the first half of the award granted.
● Recipients may receive requests to participate in promotional activities and actively leverage their professional networks whenever possible to attract users and adopters.
● Assure material is accessible and adheres to accessibility best practices and guidelines.
● Participate in project discussion, decision making processes, and other activities as requested.
● Submit a brief report (1-2 pages) reflecting on their experience with their open/alternative textbook and the outcomes after the first semester of implementation. Reports will be due approximately a month after the end of the semester in which authors/creators have implemented their textbook for the first time.
● Agree to grant K-State a non-exclusive license to share and use the content created.
● Inform the OATI Panel if they want the course fee applied to their course and complete the requirements for maintaining fee eligibility.

II. OATI review panel expectations

● Participate in promotional activities and actively leverage their professional networks whenever possible to attract users, adopters, potential partners, and funding sources.
● Find ways to feature the work created using OATI grant funds and faculty scholarship more broadly.
● Work to provide grant participants access to resources that enable the creation of their course materials.
● Participate in project discussion, decision making processes, and other activities as requested.
● Meet at the end of the academic year to compare experiences, share findings, make recommendations concerning the program, generate reports, and store initiative data.
● Arrange for timely payment of grant funds as timelines are met. Half of each award will be distributed at the beginning of the project and the remainder upon review of the final project and submission of a final report.

III. Licensing/Recognition of Contributors
All content and ancillary materials created for inclusion in this open/alternative education resource are to be licensed under a Creative Commons License. Authors grant K-State a non-exclusive license to share and use the content created. In accordance, all authors and other creators retain their copyright to their contributions and, by signing below, agree to license their content under the terms of the license they select.
Creative Commons License Selected: _____

When shared or publicized by K-State All authors/creators will be named; this attribution will include their name, institutional affiliation, and license selected so that users know how to credit the material and use it in accordance with licensing terms. This license applies to the resource created; neither the author(s) nor the OATI Panel claims ownership of any other copyrighted materials used in conjunction with it.

Have questions about copyright and licensing contact the Center for the Advancement of Digital Scholarship at cads@ksu.edu or fill out this form.

IV. Edits, Updates, and Revisions

Content produced in the context of this project may be edited, updated, reviewed, and otherwise altered over the course of the publishing process and use of the resource in the classroom to meet the needs of the course for which the grant was applied for. The final project may differ from that of the one proposed, but must be for the same course applied for and meet the same needs addressed in the application. The OATI Panel may make recommendations during the final review, but the project will be accepted and funded in full so long as accessibility needs are met and there are not outstanding legal concerns.

V. Termination

Team members reserve the right to terminate an author's participation in the project at any time if an author/creator is not fulfilling their agreed upon obligations. Termination will result in the loss of the second half of the award. A report explaining the discontinuation of the project is required.

VI. Timeline

Grants are typically completed within a year to a year and a half after the grant application is accepted. In accordance with the above the Author/Creator(s) anticipate(s) a project completion date of: _____. This is the Author/Creator(s) best estimate, there is no penalty for setbacks so long as there is communication between the Author/Creator(s) and the OATI Panel about delays.

VII. Signatures

I agree to the terms of this MOU.

Author/Creator(s) _____Date_____

OATI Team Member (Non-Library Faculty)_____Date_____

OATI Panel Member (Library Faculty) _____Date_____

Open/Alternative Textbook Initiative Fiscal Year 2020 Report

Emily G. Finch

Scholarly Communication and Copyright Librarian, Center for the Advancement of Digital Scholarship
K-State Libraries

September 2020

Executive Summary

Overview

"The Open/Alternative Textbook Initiative is a grant program that provides funding to faculty members to develop open or alternative educational resources. The major goal of the program is to save students money: courses that use open/alternative resources should have no requirements for purchase of commercial textbooks and/or other educational materials. The Initiative has received funding from a variety of sources each fiscal year. The Initiative

partners and award committee members are grateful funders recognize the contributions of faculty committed to the creation of open educational resources, and the tremendous value this program provides to students at Kansas State University" (*OATI Fiscal Year 2019 Report*, Char Simser).

Report Coverage

This report varies greatly from prior reports. This is largely due to transitions in CADS staff, the retirement of Char Simser (Team Lead, Center for the Advancement of Digital Scholarship) and the hiring of Emily Finch (Scholarly Communication and Copyright Librarian), and preparation for the KSU Foundation's All-In campaign (originally intended for March 2020) expected in March 2021. Generating a report with incomplete and inconsistent data does not have the same utility as a review of the program and an exploration on how its stakeholders can improve the initiative. This report will showcase basic data from the 2020 cycle, but largely will focus on outstanding issues and questions to ensure the success of All-In and the Initiative moving forward.

FY 2020 Cycle

Overview

Emily Finch (Scholarly Communication and Copyright Librarian) picked up the library administration of the OATI partnership in March of 2020. With the postponing of All-In until March 2021, the remainder of the 2020 cycle focused on administering the review of Spring 2020 grant applicants and the Fall 2020 course fee review. The broader review panel met once during this time to review the 18 Spring 2020 grant applicants, and the core stakeholders (Dr. Brian Lindshield, Dr. Andrew Bennett, Ryan Otto and Emily Finch) met several times to prepare and host information sessions and to coordinate the course fee review.

Fee Applicants

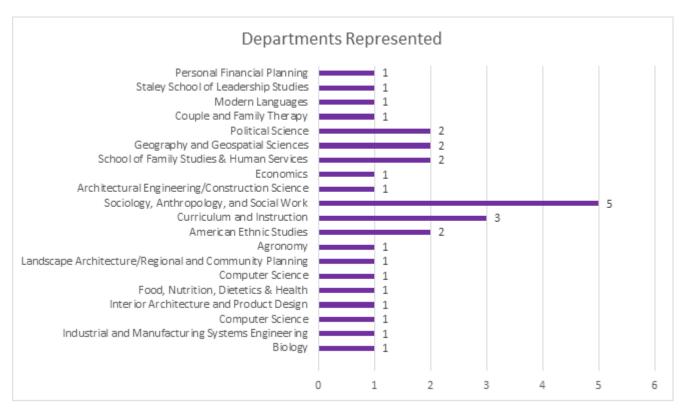| Fall 2020 Fee Application Cycle		
Applicants	Areas of Study Represented	Applications Approved for Fee
21 (for 29 Courses)	5	18 (for 21 Courses)

From April until the end of July, applications were considered and reviewed to determine courses' eligibility in attaining the OATI Course Fee. Of 21 applications (one was for four related courses in the Computer Core program) 18 applications were reviewed for a total approval of 21 new courses to receive the fee moving forward. A majority of these were courses intended to be offered in Fall 2020, with several exceptions that will not be offered until Spring 2021. Five areas of study, or rather four departments and one program, (Computer Core is offered through the Computer Science Department) were represented and the breakdown of those applications is depicted below.

Grant Applicants

Fall 2020 Grant Cycle		
Applicants	Departments Represented	Funded Projects
30	~20	14*

The FY2020 application cycles (Fall 2019 and Spring 2020) received 30 applications for funds to create open/alternative resources. Approximately 20 departments were represented (some may be sub-departments) and the exact breakdown of departments can be found below:

Departments Represented

Department	Count
Personal Financial Planning	1
Staley School of Leadership Studies	1
Modern Languages	1
Couple and Family Therapy	1
Political Science	2
Geography and Geospatial Sciences	2
School of Family Studies & Human Services	2
Economics	1
Architectural Engineering/Construction Science	1
Sociology, Anthropology, and Social Work	5
Curriculum and Instruction	3
American Ethnic Studies	2
Agronomy	1
Landscape Architecture/Regional and Community Planning	1
Computer Science	1
Food, Nutrition, Dietetics & Health	1
Interior Architecture and Product Design	1
Computer Science	1
Industrial and Manufacturing Systems Engineering	1
Biology	1

Of the 30 applications, 14 were funded. This cycle, the OATI Panel met with the Sociology, Anthropology, and Social Work (SASW) to discuss migrating the entire department to the exclusive open/alternative resources. Professor Jung Sim Jun (SASW) applied separately three times for funding to create resources for courses. SASW Program Coordinator Kristen Kremer organized the support of SOCWK 330/530 and SOCWK 510, and two of Jung Sim Jun's courses will receive a $5,000 award this application cycle as part of a larger future $15,000 commitment to the entire SASW department. In addition to wrapping up the OATI FY2020 cycles, an email was sent on July 2, 2020 to follow up with past recipients of the award with unfinished projects; the earliest of these unfinished projects dated back to 2017. To date, one completed their project since contact, one recipient replied that they were no longer continuing with their project (provided a report on the reasons for discontinuation in service of the first half of the award, and did apply for the course fee since they were using no cost open content), one has petitioned to change the course the project is intended for, six have not replied to the July email (as of September 2020), and the others are in various stages of progress many implementing this term and writing their report.