

Contributors to the Successful Implementation of OER Program Components

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ABSTRACT

There are well-documented barriers to implementing open educational resources (OER) programs at institutions of higher education. Many institutions have overcome these difficulties and developed successful OER programs with various program components. Despite the nuances in each institution's approach, OER program components are often similar across campuses. This research addresses the ability to infer the success (continuity and growth) of OER program components based on institutional characteristics. Results show that there were few positive correlations between institutional characteristics and the successful implementation of different program components. However, positive correlations were found among some of the individual program components. The lack of correlations between program components and institutional characteristics implies that OER program implementations are individualized to the institution. While other institutions' experiences can be used to inform new OER implementations, each institution needs to find their unique path to success. In discussions about this unique path to success, we discovered experiential themes of implementation for those managing an OER program. These themes are described.

Keywords: OER, Open Educational Resources, OER Program Components, OER Program Themes

Contribuyentes a la implementación exitosa de los componentes del programa REA

RESUMEN

Existen barreras bien documentadas para implementar programas de recursos educativos abiertos (REA) en instituciones de educación superior. Muchas instituciones han superado estas dificultades y han desarrollado programas exitosos de REA con varios componentes de programas. A pesar de los matices en el enfoque de cada

institución, los componentes del programa REA suelen ser similares en todos los campus. Esta investigación aborda la capacidad de inferir el éxito (continuidad y crecimiento) de los componentes del programa REA en función de las características institucionales. Los resultados muestran que hubo pocas correlaciones positivas entre las características institucionales y la implementación exitosa de los diferentes componentes del programa. Sin embargo, se encontraron correlaciones positivas entre algunos de los componentes individuales del programa. La falta de correlaciones entre los componentes del programa y las características institucionales implica que las implementaciones del programa REA están individualizadas para la institución. Si bien las experiencias de otras instituciones se pueden utilizar para informar nuevas implementaciones de REA, cada institución debe encontrar su camino único hacia el éxito. En las discusiones sobre este camino único hacia el éxito, descubrimos temas experimentales de implementación para aquellos que administran un programa REA. Estos temas se describen.

Palabras clave: REA, recursos educativos abiertos, componentes del programa REA, temas del programa REA

开放教育资源(OER)项目组成部分的成功实施：一系列贡献因素

摘要

在高等教育机构实施开放教育资源(OER)项目一事存在有据可查的障碍。许多机构已经克服了这些障碍并开发了成功的OER项目，后者具有不同的项目组成部分。尽管每个机构的方法存在细微差别，但OER项目的组成部分在各个校园中通常是相似的。本研究分析了一种能力，即根据机构特征推断OER项目组成部分的成功（连续性和增长）。结果表明，机构特征与不同项目组成部分的成功实施之间几乎没有正相关关系。不过，一些单独的项目组成部分之间存在正相关关系。项目组成部分与机构特征之间缺乏相关性，这暗示OER项目的实施因机构而异。虽然其他机构的经验可用于为新的OER实施一事提供信息，但每个机构都需要找到适合自身的成功路径。通过探讨独特的成功路径，我们发现了OER项目管理人员在实施方面的经验主题，并对这些主题加以描述。

关键词 OER，开放教育资源，OER项目组成部分，OER项目主题

Definitions

Throughout this paper we use the terms *OER program*, *OER program component*, and *institutional characteristic*. For clarity here are the definitions:

OER Program

An overall effort to increase OER use on a campus. It is a combination of all work that leads to the adoption of no- or reduced-cost course materials for students while maintaining expected quality of education. As noted earlier, the program may also promote other aspects of campus affordability.

OER Program Component

A unique piece of the OER program that leads to the program's overall success (i.e., a strategy that increases OER use and/or OER creation at an institution). These *components* could include anything that encourages instructors to exclusively use OER and other low-cost resources for the purpose of course affordability. The most common OER program components are:

- grant programs supporting OER adoption, adaptation, or creation
- library resources (interlibrary loan, course reserve, purchasing eBooks, etc.)
- publishing support (e.g., Pressbooks, institutional repositories, or other publishing platforms)
- workshops/training for librarians or faculty
- print-on-demand options

Institutional Characteristic

A common feature of an institution related to the viability of OER programs. Specifically, this research considered an institution's

- campus open access (OA) or OER policy
- inclusion (or lack thereof) of OER in its strategic plan
- campus or library OER committee or working group
- Carnegie Classification
- number of full-time-equivalent (FTE) students attending the institution
- status (i.e., public or private; non-profit or for profit)

Introduction

According to Creative Commons, open educational resources (OER) are “teaching, learning, and research materials that are either (a) in the public domain or (b) licensed in a manner that provides everyone with free and perpetual permission to engage in the 5R activities,” that is: retain, reuse, revise, remix, and redistribute (Wiley, “Access Compromise,” “License Draft”). Further, the William and Flora Hewlett Foundation defines open education as “the myriad of learning resources, teaching practices and education policies that use the flexibility of OER to provide learners with high quality educational experiences.”

Using OER drastically increases the affordability of education. How-

ever, most institutions leverage other practices to make education more economical, such as changing to cheaper texts, negotiating reduced prices for course materials, or decreasing the cost of course materials by using resources available through the institution (e.g., course packets purchased through the bookstore, library database subscriptions or course reserve, faculty-developed content). While these practices do not eliminate the cost of course materials like OER do, they can help students financially through the rigors of college life while maintaining high academic standards.

According to a 2019 Bay View Analytics report, awareness of OER on college campuses continues to increase while the use of OER is relatively flat (Seaman, “Inflection Point”). This data implies that instructors are reticent to use OER, likely due to well-documented misunderstandings about academic freedom, lack of time, or other reasons. Transitioning to OER/affordable course content requires time that many instructors do not have. However, faculty who have incorporated OER material into their curriculums rate their satisfaction with OER textbooks and non-OER textbooks the same (84%). While satisfaction does not indicate quality, it does indicate positive faculty perceptions of OER—a trend that hopefully will lead to more faculty exploring potential open content.

Support for OER exploration and implementation often centers in campus libraries. Kleymeer, Klienman, and Hans argue that libraries are perfectly positioned to be heavily involved

in the management and support of OER on college campuses. Libraries already have the infrastructure and relationships in place to help OER programs succeed. Infrastructure components such as search and discovery, copyright expertise, data storage, metadata and indexing, and institutional repositories can be beneficial to OER programs. Relationships are also key to their success, and libraries have experience in outreach and education, curriculum development, and instructional support. Ten years after the publication of Kleymeer, Klienman, and Hans’s article, we see that many OER and affordability programs are indeed managed by campus libraries, often in collaboration with other campus offices or programs, such as IT, teaching and learning centers (or equivalent), and student government.

While many OER programs are collaborative efforts, an institution’s program implementation varies depending on its mission, vision and values, and administrative support, as well as the personnel involved in the program development. Beginning an OER program at an institution is often difficult. For example, many institutions appoint library employees to oversee OER programs, but libraries often suffer from a lack of funding and personnel. The management of an OER program is often added to the workload of a current library employee instead of creating a new position or rebalancing responsibilities across a library team. Thus, choosing the best path toward OER program implementation can be challenging, especially without additional funding or personnel. Looking to examples of success can be

instructive, but institutions use a variety of components to build OER programs, and how can one know which combination is best?

The purpose of this project was to determine if the implementation of OER programs succeeds in institutions with similar characteristics, such as Carnegie Classification. The end goal was to help institutions that have not yet implemented an OER program decide which components they could more easily or successfully implement based on similarities to other institutions.

Literature Review

The literature available about OER programs focuses mainly on how their implementation saves students' money (Hilton, et. al. 2014), increases student retention rates (Clinton and Khan), or improves and maintains curriculum outcomes for students using OER (Jhangiani, et. al. 2018). These, along with other measures such as the Success Framework Rubric (DeFranco, et al.) help define whether an OER program is successful. Related research exploring the process of implementing an OER program, the quality and quantity of OER, the pedagogical uses of OER, and comparisons between OER and traditional textbooks is abundant. In addition, issues of diversity, equity, and inclusion has recently been emphasized in OER research.

Student perception of OER and open pedagogy is another area of exploration. Baran and AlZoubi interviewed students participating in courses using open pedagogical practices.

The researchers categorized responses according to three theme categories: "OA knowledge and awareness," "student agency," and "pedagogical practice." Each of these themes represent "affordances and challenges" for implementing open education practices in courses. Baran and AlZoubi address these affordances and challenges in a "model of open pedagogy in action" which "provides instructors with practices to develop student knowledge and awareness of open access and student agency in their classrooms." It is a scaffolding model helping students move from reflection to community engagement while passing through the steps of development, content curation and peer feedback. While students normally positively perceive the money-saving aspects of OER, other student-success metrics are also important to determine. The results of a 2018 study by Colvard and colleagues demonstrate that "OER improve[s] end-of-course grades and decrease[s] DFW [drop, fail, withdraw] rates" (262). These results also show that disadvantaged groups are more positively impacted by the use of OER: their DFW rates decrease, and their grades increase at a more rapid pace than those of non-disadvantaged students.

Amy Miller described five phases in developing a successful OER program. She described these phases as analysis (matching the program to institution mission and vision), adoption ("the development of an implementation strategy"), optimization (adapting program components locally), evaluation (assessing all aspects of the program and OER on campus) and stabilization

(developing and adopting “sustainable OER strategies and policies”). Nikoi and Armellini discussed potential OER program implementation with the “mix framework: purpose, processes, product, and policy” relying on framework used for marketing. They propose that the 4 Ps can also be applied to OER program implementation by suggesting that “institutions may need to consider what an OER initiative may help them achieve (purpose); what resources, systems, and quality control mechanisms they need to embark on and sustain such an initiative (process); the types, characteristics, licensing arrangements, and target audiences of the OER themselves (product); and the governance of such initiatives, with their future implications (policy)” (177).

Hilton and his Open Ed Group colleagues have gathered “a summary of all known empirical research on the impacts of OER adoption.” Their list divides the research into two main categories: “efficacy of OER or teacher/student perceptions of such resources in actual practice.” In their bibliography they list research reports in three groupings: “studies that included data on both efficacy and perception,” “studies that focused on efficacy,” and “studies that focused on perception.” While this compilation is not comprehensive, it does represent a significant gathering of research articles that focus on functioning OER programs. While each of these articles is important, no research has explored if there are institutional characteristics that inform which components of an OER program can be more effectively or more easily implemented

at an institution. There is also a lack of research addressing how institutions can determine which OER program components to implement, as individual components impact program success.

Methodology

We gathered data through a survey and interviews. By combining survey responses (quantitative) and coded interview transcripts (qualitative), we hoped to gain a deeper understanding of any correlations that our research found between institutional characteristics and OER program components.

We expected the analysis of survey results to show positive correlations between institutional characteristics and OER program components. The interviews, on the other hand, were intended to help us further explore those potential correlations and seek for related qualitative details not covered by the survey. We also used the coded interview transcripts to explore common trends or themes in the data.

Survey

In early 2020 and then again in mid-2021, we distributed a survey (see Appendix A) to various e-mail lists associated with efforts to make educational resources open and affordable. Primary participants in these e-mail lists were leaders who direct campus OER program implementation and development. We requested survey responses twice because of timing. The first distribution was at the beginning of the global pandemic, when institutions were in

the midst of adjusting to teaching and supporting teaching fully online. Time was at a premium during that period, and responses were few. We sent a second request just over a year later when the pandemic seemed to be receding, hoping there would be more participant bandwidth to devote to responding. Unfortunately, this request also yielded few responses.

The primary purpose of the survey was to discover which components of OER/affordability programs the institutions had implemented. To determine which component options to include in the survey, we researched OER programs at multiple institutions to discover the most common components. After asking for basic identifying information about the institution, the survey asked respondents to select components from a list that were currently part of their institution's OER program. In addition, we allowed for a free-response entry to cover any components we may not have included, but this option was rarely used.

To simplify and shorten the time required to take the survey, we requested minimal institution information, including the institution name, whether the institution had an OA or OER policy, whether OER was part of the campus or library strategic plan, and whether there was an institutional OER committee or group. If applicable, we also asked what campus organization administered the institution's program and how old the OER program was.

When the survey results were ready for analysis, the principal investigator (PI) and research assistant (RA)

gathered the publicly available institution characteristics (Carnegie Classification, student FTE, Public/private, for-profit/non-profit status) and added those to the institution data set.

When we entered the Carnegie Classification, we used the full list of over 30 options (American Council on Education). However, the number of survey responses we received did not provide enough variety in each of the classifications to do effective analyses for all the options. After reading through the classification definitions, we thus determined that the classifications could be combined into what we termed "simple classes." These categories consisted of the highest degrees awarded by institutions:

- doctorates
- master's
- bachelor's
- associate's

We also recorded additional institutional data for institution profiles. For example, we entered the number of students that attend each institution, information often found on Wikipedia. To perform correlations with the number of FTE students, we developed a scale, allowing us to place each institution's students into one of seven ranges (0–5,000; 5,001–10,000; 10,001–15,000; 15,001–20,000; 20,001–25,000; 25,001–30,000; > 30,000).

Using JMP Pro 16 (a statistical-analysis software program), we performed correlation and significance analyses between institutional characteristics and program components

from the survey as well as correlations between program components. We expected these correlations to help us determine if certain OER program components were found more often at institutions with specific characteristics or if some program components often exist together.

Interviews

The semi structured interviews were designed to explore campus OER programs more in depth with their leaders; topics included how interviewees defined OER success and what struggles they faced. Interviewees were selected in one of two ways. First, the survey provided an option to volunteer for an interview. These interviews were all conducted via video conferencing with both the PI and RA in attendance. Had the time and funding been available these interviews would have taken place in person. Each participant agreed to be recorded, and only the audio was used in the transcription and coding process. These interviews were performed during the summer of 2020.

The second manner we recruited interviewees was via direct e-mail from the PI to OER leaders (those who direct the campus OER program) with whom he had established professional relationships in the states where he planned to travel. These interviews were performed with OER program leaders in six states (Virginia, Massachusetts, Rhode Island, Oregon, California, and Hawaii). The PI selected potential interview locations by reaching out to personal contacts and asking for referrals to OER leaders at institutions

in their area. The PI then emailed those referrals to request an interview during the window of time he would be in the area. Most of these referrals were previously unknown to the PI. Interviews performed in person seemed to have a more relaxed feel and the PI was able to make personal connections more easily with the interviewees. These interviews were performed during the fall of 2021, when travel was finally allowed as the pandemic began to recede in seriousness. Each of the participants during the second round of interviews also agreed to be audio recorded.

Nineteen interviews were conducted in person, and thirteen were done via video conferencing. Further, eight of the interviews were done with groups of two or more people. As we can see from the above, most OER programs from this group of interviewees were directed by one person. The interviews, whether in person or over Zoom, lasted around 60 minutes each and were approached more as a discussion than a question-and-answer experience. However, the same questions (see Appendix B) were explored in each interview during the conversation.

The audio from the video conference interviews was imported into Otter.ai (a voice-to-text transcription software) to generate a transcript for coding. The in-person interviews were directly recorded using the Otter.ai cell phone app, thus removing the import step. A digital audio recorder was also used as a backup for the in-person interviews in case the primary recording failed, but fortunately it was not needed.

The interview audio was verified and corrected by both the PI and RA through reading the transcripts as the audio played. The transcript text was then imported into Dedoose (an on-line qualitative-data analysis software) and coded. Using this coded qualitative data, we discovered recurring themes in the conversations.

Results

Survey Data

Institutional characteristics common across all 137 institutions that we studied included the number of FTE students, Carnegie Classification (with nine exceptions), public vs. private status, and nonprofit vs. for-profit status. All participating institutions were nonprofit organizations. Characteristics not common among the institutions we examined include the presence of an OA or OER policy and the inclusion of OER in an institution's strategic plan. We received 235 survey responses, of which 137 were complete and used for analysis. Of the total responses we analyzed,

four were from Canadian institutions (one private, three public) and five were from university or college systems that could not be classified. Because of this, the analyses we did relating to Carnegie Classification were only done with the 128 U.S. institutions. Using simple classes (see table 1) to categorize institutions, we had respondents from all levels (doctorates: 35%, master's: 20%, bachelor's: 14%, and associate's: 31%). Public institutions (see table 2) were more representative than private institutions (80% vs. 20%, respectively).

Table 1 also shows the 2021 distribution of institutions (Carnegie Percentages) as reported by the Center for Postsecondary Research at Indiana University Bloomington School of Education (7). This information is included to compare the distribution of institutions analyzed in this study with the distribution of all U.S. institutions. The percentages in Table 2 show the distribution of public and private institutions including those without a Carnegie Classification.

Table 1. Distribution of Simple Carnegie Class categories of participating institutions, actual Carnegie percentages, and Public vs. Private percentages (limited to U.S. institutions).

Simple Class (N = 128)		Carnegie Percentages	Public	Private
Doctorates	35.16%	11.90%	28.91%	6.25%
Master's	19.53%	16.93%	12.50%	7.03%
Bachelor's	14.06%	18.63%	7.81%	6.25%
Associate's	31.25%	24.09%	30.47%	0.78%

Table 2. Distribution of public and private institutions including institutions not classified in Carnegie categories.

Institutions (N = 136)	
Public	80.29%
Private	19.71%

Of the responding institutions, most (72.66%) had a *committee or group* in charge of OER efforts. Two other program components—*training/workshops* (56.25%) and *grant/stipend* (42.97%)—were also popular among responses. These same top three com-

ponents are consistent across classifications except in the case of the associate's level (see Table 3). The *committee/group* and *training/workshops* components exist at more than half of institutions, suggesting that these are the components most established on campuses.

Table 3. Distribution of OER program components and institutional characteristics by simple Carnegie classification.

	Total	Doctorate	Master's	Bachelor's	Associate's
Committee / Group	72.66%	75.56%	84.00%	66.67%	65.00%
Grant/Stipend	42.97%	53.33%	40.00%	38.89%	35.00%
OA Policy	11.72%	17.78%	4.00%	5.56%	12.50%
OER Policy	10.16%	4.44%	8.00%	11.11%	17.50%
Print on Demand	14.06%	8.89%	8.00%	22.22%	20.00%
Publishing	19.53%	40.00%	20.00%	5.56%	2.50%
Strategic Plan	32.03%	17.78%	40.00%	16.67%	50.00%
Training / Workshops	56.25%	60.00%	64.00%	38.89%	55.00%

The percentage of public and private institutions that had these program components is shown in Table 4. *Committee/group* (public, 72.36%; private, 55.56%) and *training/workshop* (public, 58.18%; private, 40.74%) remain the

top two components for both public and private institutions. Also of note is that there is a higher percentage of public institutions that have each of the components than private ones.

Table 4. Percentage of Public and Private institutions with each program component, including the Canadian institutions and educational systems.

	Public = 110 (80.29%)	Private = 27 (19.71%)
Committee/Group	76.36%	55.56%
Grant	46.36%	22.22%
OA Policy	12.73%	3.70%
OER Policy	11.82%	0.00%
Print on Demand	15.45%	7.41%
Publishing	20.91%	14.81%
Strategic Plan	35.45%	29.63%
Training/Workshops	58.18%	40.74%

Another potential determining factor as to which components are implemented at an institution is the size of the student body (see Table 5). With the exception of the 5,001–10,000 group, we again see that *committee/group* and *training/workshop* are the most com-

mon components among institutions. Even in the 5,001–10,000 group, *committee/group* is still the most common, and *training/workshop* is the third most common. To put the percentages in context, please note the number of institutions in each of these FTE categories.

Table 5. Percentages of program components at institutions of various student FTE sizes.

Program Component	Total	0–5,000 (<i>n</i> = 35)	5,001–10,000 (<i>n</i> = 22)	10,001–15,000 (<i>n</i> = 19)	15,001–20,000 (<i>n</i> = 9)	20,001–25,000 (<i>n</i> = 10)	25,001–30,000 (<i>n</i> = 9)	30,001+ (<i>n</i> = 31)
Committee/Group	70.15%	47.06%	77.27%	68.42%	77.78%	90.00%	77.78%	80.65%
Grant	41.04%	29.41%	50.00%	26.32%	55.56%	40.00%	44.44%	51.61%
OA Policy	11.19%	2.94%	13.64%	10.53%	11.11%	0.00%	22.22%	19.35%
OER Policy	9.70%	2.94%	13.64%	21.05%	0.00%	10.00%	0.00%	12.90%
Print on Demand	12.69%	11.76%	22.73%	15.79%	11.11%	10.00%	0.00%	9.68%
Publishing	19.40%	14.71%	4.55%	10.53%	44.44%	10.00%	11.11%	38.71%
Strategic Plan	31.34%	35.29%	22.73%	31.58%	33.33%	20.00%	33.33%	35.48%
Training/Workshop	53.73%	44.12%	45.45%	68.42%	66.67%	60.00%	44.44%	58.06%
Total		25.37%	16.42%	14.18%	6.72%	7.46%	6.72%	23.13%

We also looked at the correlation between institutional characteristics and program components. Most correlations were not statistically significant (see Table 6). Those that were statistically significant showed very low correlations.

To understand the cooccurrence of program components we looked at which program components were

found in combination with each other (Tables 7 and 8). *Committee/working Group* and *training/workshops* often function in connection with other components. This is in line with earlier results in which these two were the most common components. The positive correlations demonstrate that they exist together at almost half of the institutions.

Table 6. Correlations with Pearson Significance

Program Component	Carnegie Class	Public vs. Private	Number of FTE Students	OA Policy	OER Policy	Strategic Plan
Committee/ Group	0.0437 (0.2688)	0.1173 (0.0063)	-0.1885 (0.0199)	0.2212 (0.0242)	0.3141 (< .0001)	0.1535 (0.0286)
Grant/Stipend	-0.1494 (0.3350)	-0.2032 (0.0191)	0.1386 (0.3232)	-0.2009 (0.0592)	-0.1504 (0.1122)	-0.0427 (0.3674)
Open Publishing	0.4059 (< .0001)	-0.0602 (0.4872)	0.2342 (0.0126)	-0.1958 (0.0668)	-0.0228 (0.4821)	0.0309 (0.1760)
Print on Demand	0.1611 (0.2416)	-0.0904 (0.2972)	-0.0937 (0.6963)	-0.0947 (0.0067)	-0.1714 (0.1237)	-0.1558 (0.1263)
Training/ Workshops	-0.0696 (0.3624)	-0.1435 (0.0980)	0.0876 (0.4491)	-0.0909 (0.5009)	-0.2269 (0.0278)	-0.1352 (0.2760)

Table 7. Co-occurrence of OER program components

Committee/ Group	Committee/ Group				
Grant/Stipend	36.96%	Grant/ Stipend			
Publishing	16.67%	15.22%	Publishing		
Print on Demand	13.04%	8.70%	4.35%	Print on Demand	
Training/ Workshops	49.28%	33.33%	16.67%	11.59%	Training/ Workshops

The institutional characteristics of *OA policy*, *OER policy* and *strategic plan* did not exist at most institutions. Table 8 shows the cooccurrence of these characteristics with other OER program components. Having OER as part of an institution's strategic plan, though not

common, occurs the most with other program components. This pattern suggests that working toward the inclusion of OER in an institution's strategic plan could be helpful for implementing other program components.

Table 8. Cooccurrence of uncommon institutional characteristics with OER program components.

	OA Policy	OER Policy	Part of Strategic Plan
Committee / Group	10.22%	8.76%	27.74%
Grant / Stipend	7.30%	5.11%	13.87%
Open Publishing	4.38%	1.46%	4.38%
Print on Demand	3.65%	2.92%	8.03%
Training / Workshops	7.30%	8.03%	21.90%

Interviews

In total, we performed thirty-one interviews with forty-three individuals representing thirty institutions and one system-wide OER program across twelve states. Eight of the interviews were performed with small groups of people (ranging from two to ten) while the remainder were conducted with individuals. The number of people participating in the interviews was mostly dependent on how many people participated in the OER program on a campus. Group conversations allowed for discussion between colleagues, which helped clarify or expound various topics. It was primarily during the interviews that common themes were discovered between institutions.

Though few positive correlations were found between institutional characteristics and OER program components, the interviews revealed some important themes concerning the successes and challenges relating to OER program implementation. Some of these themes connect to points in the categories from the *OER Success Framework Rubric*, developed by DeFranco and colleagues. While this framework was developed specifically for SUNY institutions, the concepts can be applied more broadly, especially considering the themes that emerged from these interviews. During the interviews we discovered eight main themes (see Fig. 1). They will be described in detail below.

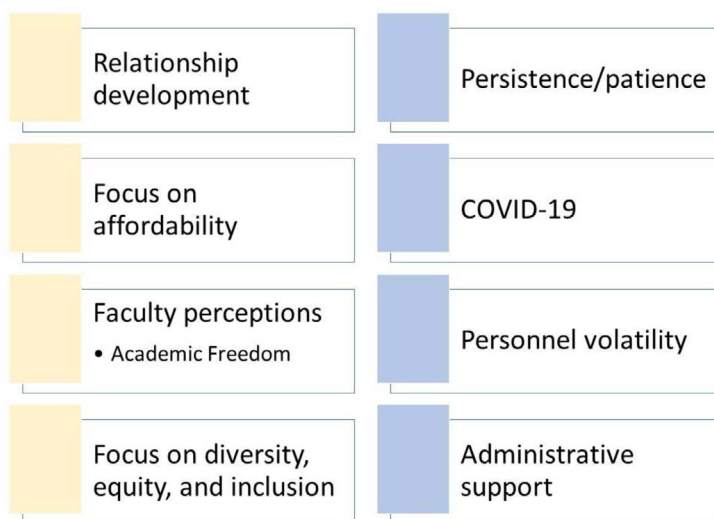


Figure 1. Emergent themes from interview data.

Relationship Development

The theme most often repeated in the conversations with interviewees was the need for developing strong relationships on campus and in the library. Four

of the categories in the *Success Framework Rubric* (categories 1, 2, 5, and 6) deal with interpersonal relationships within an institution (DeFranco, et al.). Key relationships mentioned in the in-

interviews included those with the Center for Teaching and Learning (or equivalent), online learning, the campus registrar, campus IT, the bookstore, and campus administration (most often the provost). Not every successful program has relationships with all these potential stakeholders. However, interviewees thought these relationships were a key to success. Cultivating relationships with campus administrators seems to be much easier on smaller campuses. Speaking of having closer connections with faculty and administrators, one librarian at a small rural university noted, “that’s the great thing about being a small campus.” Though there was no positive correlation between OER program components and the number of FTE students (i.e., campus size), those at smaller campuses reported more opportunities to communicate with administrators and faculty and those at large institutions reported communication difficulties.

Strong relationships with OER stakeholders contribute to the success of an OER program by providing networking and communication channels to key entities on campus as well as potential sources of funding through those connections. Funding support is important for grant programs, and staff time and resources help other program components grow.

Persistence and Patience

Nine of the interviews included comments emphasizing the importance of being patient and persistent while working to develop an OER program

or components of that program. In the case of implementing OER programs, both qualities are necessary. One librarian described the persistent efforts she takes; she “stops faculty as [she] walks down the halls and gets them” to talk with her. Another librarian stated, “I’ve been at this for a really long time, so there are a lot of things that I’m trying again that didn’t work years ago, for various reasons. But I’m trying them again.” By reintroducing these concepts regularly, this librarian has found some success. Timing is often as important as the concepts being conveyed.

Referring to the anxiety felt by a librarian when things happen much more slowly than desired, one assistant university librarian remarked, “This is a marathon, not a sprint!” Persistence was emphasized by another librarian who stated, “When we have people who are constantly talking about something that is valuable to [all stakeholders] and the state of education, and it is repeated often, eventually they think, ‘Great! Okay, yes, I’m with you. I understand now.’ And they will help.” Persistent communication is essential for OER efforts to progress on a campus.

Focus on Affordability

Affordability is the effort to reduce course-material costs when eliminating the costs is either not possible or would negatively impact learning outcomes. The following interview excerpt exemplifies reasons why affordability is so important to many institutions: “Well, in our case, because of our function as a Hispanic-serving institution, with

a lot of first-generation students, a lot of students from more disadvantaged backgrounds, affordability is probably where I begin. Because everyone on our campus knows that those are our issues, and that they're important, that our students struggle." The phrase "in our case" demonstrates the unique nature of all institutions suggesting that program or component implementation will likely be different on all campuses.

Leveraging library resources is an emphasis of most affordability programs. Strategies shared by interviewees include purchasing one copy of every textbook to put on course reserve or maintaining a very small course reserve that only includes texts provided to the library by faculty. Most institutions fall somewhere between these two extremes. Some institutions also promote the ability to connect students directly to database content for course materials, while others more strongly promote the use of interlibrary loan services.

At some institutions, a consortium or other group facilitates leveraging library resources. For example, VIVA, Virginia's Academic Library Consortium, has a program that allows faculty members from any participating institution to request an eBook purchase that then becomes available to faculty at all participating institutions. On many campuses, affordability motivates the faculty and still helps students. For example, one librarian said, "Our program started around textbook affordability, which doesn't necessarily limit itself to just OER." Another librarian responded, "I want the faculty to be able to teach and the students to be able

to learn in the most effective manner possible. And I don't care what the solution is. I feel like my job is to know what all of the possible solutions are and to present them in a way that allows the faculty to choose the one that is most effective for them and their students." Interviewees reported that this type of system- or consortium-wide approach to supporting state libraries was a key contributor to program success.

Course marking is another method of promoting course affordability. It consists of designating certain courses in the course catalog as affordable, low cost, or OER (suggesting no-cost). Some state governments require this marking, so each institution in those states has implemented this system or is in the process of doing so. However, there is flexibility in how institutions choose to mark the courses. Some institutions have a single designation for OER and affordable courses, while others distinguish between them. At one institution "over 50% of . . . courses have a cost-free course designation." Some institutions struggle with implementing course marking in part because necessary technology and or processes are not yet in place. One small institution has chosen to create a web page listing affordable course options. This method is obviously time intensive, but it is an important step to serving students looking to reallocate funds to life-essential expenses like food or rent.

Institutions may also differ in how they define "affordable" for their campus. During the interviews many reported using a dollar amount ranging from twenty to fifty dollars per course

for materials (with exceptions such as lab fees) to mark a course as affordable. The upper limit set by an institution is less important than information given to students to help them make decisions when choosing which course or section of a course to take. Another librarian shared the example of a faculty member who used what he called the “Frankenstein approach” to course content: using a cheaper text (\$20) and supplementing it with library resources and other course content he created himself. This example demonstrates the ingenuity of faculty to help students save money without sacrificing a high standard of education.

COVID-19

While the COVID-19 pandemic was an undercurrent in most interviews, there were few explicit comments relating to the impact it had on OER program success. One interviewee mentioned that COVID-19 had influenced their program in a positive way: “The pandemic has been a factor, because of the shift to remote, and that shift in the bookstore to eBooks, I think, has really opened people’s eyes to trying to prepare for a remote environment.” While others mentioned COVID-19 as impacting the entire institution, few mentioned it as a direct contributor to or detractor from OER programs. One interviewee described faculty who, when campuses were shut down, “were so happy that they had converted their courses [before the pandemic to ones using OER], because everybody was scrambling for textbooks” while they were less impact-

ed. Others mentioned how the experience of moving online was good preparation for any future time that remote learning is required. However, others mentioned that the pandemic put a strain on librarians’ time that was often taken from OER programs.

Faculty Perceptions

Surveys have shown that not only are faculty increasingly aware of the high cost of course materials but they also care deeply about the financial situation of the students (Seaman and Seaman, “Digital Texts”). In addition, Bay View Analytics reported in 2020 that faculty satisfaction with OER content is “now slightly higher than for those using commercial textbooks.” However, adoption rates did not increase with awareness despite the move to online teaching (due to the pandemic), which increased proportionally from 34% to 71%.

Shifting faculty perspectives regarding OER takes time. This fact is exemplified by the following experience from an interviewee:

I’ve tried to take a gentle approach with faculty. I have one faculty member who teaches education. We have a good relationship. But he published a textbook he still uses in his class. I’m not going to tell him, “You should be using OER. You shouldn’t be doing this.” [When I talk to him about OER] he’s always joked with me, “Oh yeah, like you’re trying to get me to lose money, blah blah blah.” But this summer he came to me and said, “I want

you to help me save my son some money. Let's try to find books in the library on reserve." It's not OER, but he's starting to come around.

One important aspect in working with faculty is getting them talking to each other. One interviewee reported getting better OER outcomes when "faculty talk to faculty! That's the number one key to success! . . . I can instigate sharing sessions and videos. But unless it's instructor talking to instructor . . . that's the most powerful message." Successful methods to start faculty conversations regarding OER can include gatherings such as learning communities or open talking sessions. One interviewee shared: "I get a roomful of faculty and start sharing the microphone, and I don't get it back for a while, because they want to talk. So, after I prime them up with coffee and donuts and do my five-minute spiel, I hand over the microphone. And they're off and running."

When approached regarding the topic of OER, some faculty are vocal about retaining their academic freedom. Comments received during the interviews showed that the size and type of institution could be a predictor of faculty attitudes toward academic freedom.

When the faculty understand that using OER does not restrict, but rather enhances academic freedom, they are more willing to consider it. It is also important to note that this understanding is one key to success with faculty. No faculty will change direction until they feel it is beneficial to the stu-

dents as well as themselves.

Academic freedom is an integral part of the correct use of OER. As OER leaders we need to respect academic freedom by assisting in course content discovery while remembering that we are not the subject experts; the ultimate decision of what content to use for a course lies with the faculty. During the interviews, librarians voiced their frustration that faculty don't seem to understand that OER encourages and increases academic freedom by, among other things, allowing faculty to follow their preferred curriculum instead of relying on the dictates of a textbook. Another librarian mentioned how "different disciplines have different cultures and different characteristics and need support in different ways." In other words, it is important for OER program leaders to understand discipline differences in order to support faculty more effectively.

As faculty become more knowledgeable about OER their attitudes begin to shift. It may not be that they immediately begin using OER in any of its forms, but they are at least considering open or free content when they rework their curriculum or develop a new course. Referring back to a prior theme, patience and persistence are key to helping faculty realize their role in helping students improve their educational experience while at the same time reducing overall college costs.

Personnel Volatility

Personnel volatility was the most frequently repeated theme in the interviews (fifteen interviewees mentioned

this issue directly, with others alluding to it). Changes in staff impact the implementation of OER programs in various ways, depending on the employment level at which the turnover happens. Volatility happens at all levels, even up to campus presidents and provosts. One interviewee stated:

We lost our bookstore manager. And we got another one. And then we lost both our bookstore manager and our textbook manager this past year. And so now we're starting kind of all over, and even our cafe manager, like all of them left.

This phenomenon has been referred to as the "Great Resignation" and has reached all levels of employment, including the White House (Z. Miller). In addition, in most cases each position is temporarily filled, which presents an altogether different issue.

A related thread of conversation, discussed 20 of the interviews, was the workload of those responsible for leading OER efforts. Most often interviewees reported that OER responsibilities were added to an existing position without rebalancing the employee's other responsibilities, an addition either mandated from above or self-assigned because of a belief in OER and their potential. One interview group discussed their assignment process as follows: "So, it's not like they gave it to us . . . It's just something that we took on of our own volition." Additional responsibilities can lead to a sense of being overworked or an inability to fulfill all responsibilities. Job priorities are often determined

by administration or circumstance. The following is a representative quote of many interview comments:

It's just I've been so busy this summer. And the OER program is me. I don't have student assistants. I try to incorporate it [OER efforts] in collaborations with colleagues. I try to pull in subject librarians. They'll work together or join you. When I have a consultation with faculty, I try to spread the knowledge. But it's not anything really concrete. It's very much me and my department head who have started this conversation . . . if I were to move on or not be here anymore the OER program is done, because it all lives just with me, no one else knows how to run the incentive program.

Of the institutions included in this study, many had turnover at the president and provost level. Often an administrator who was very supportive of OER left and was replaced by a new administrator with unknown perceptions of OER. The experience of delaying OER efforts or "starting over" frustrated many interviewees, such as the following interviewee: "It's almost a little bit on hold. Because we just got a new e-learning dean, who is going to be in charge of OER." Consistency in program and campus leadership is a strong indicator of the success of an OER program. Having to retrain or reeducate leadership takes time and effort that is often unavailable due to the workloads of many program leaders.

Another issue related to personnel is the necessity to develop a plan for program sustainability. Multiple interviewees mentioned that they are the only person trying to manage their institution's OER program, a circumstance that leads to potential gaps in program continuity. One librarian mentioned that "it's a little bit of succession planning . . . if I were to get COVID and be out for a month or two, then what? That's a realistic thing. Or if I were to get another job, who knows? So, it's a little bit of succession planning, but also just how to make it more sustainable in the sense that it's not all contained within one person." Program sustainability is a discussion that should happen at the administrative level because OER leaders often "don't have time to think about how to fix this capacity and sustainability problem because [they're] so busy doing the day-to-day stuff."

Focus on Diversity, Equity, and Inclusion

Course content published with an open license has a much greater potential to contain diverse views, images, and context than traditional resources. However, Brandle found that current "OER textbooks do not perform any better (or any worse) than their traditionally published counterparts when it comes to representation of historically marginalized groups" (738). This research analyzed the indices and text of eleven textbooks published between 2014 and 2019, one of which was an open textbook.

Ten interviewees discussed ways

advocates of OER are hoping to reverse the lack of diversity, equity, and inclusion (DEI) in OER. Most mentions of DEI by interviewees related to the best ways to promote OER to campus administrators and faculty. The following quote from an interview demonstrates this trend: "We are pitching our grants program as much about new pedagogy, as new forms of inclusive teaching in alignment with our diversity, equity, inclusion and accessibility goals." In addition to promoting content relating to marginalized groups, some interviewees mentioned access to course content, as exhibited in the following excerpt: "I do also try to sell first-day access to faculty as well as an equity concern."

In two cases student diversity was mentioned as a reason why OER are so important to the success of students. The following quote from an interviewee is a great example of how we should all approach DEI in our OER work:

I think of the diversity that we have here and the affordances of OER for adapting and tailoring our resources to our student body. We are becoming more and more mindful of ways that textbooks should be representative of different cultures, of ways that textbooks should acknowledge, and include, the voices of different populations. We can do that here because we have a wealth of knowledge of students who can help to build into our repositories of knowledge. And so, I think that is super important.

Administrative Support

In thirty-nine percent (12) of the interviews administrative support as a key to success was discussed. “To have administration say to the faculty, ‘Please make this a priority, please consider attending one of these workshops or sessions and work with the library, and on OER,’ has greatly contributed to program success,” said one interviewee. Many also mentioned the importance of administrators knowing their role in supporting OER programs. On some campuses, or in some systems, administrators cannot risk showing too much support, as they run the risk of the faculty seeing OER programs as a mandate infringing on their academic freedom. However, in other situations it is better for administrators to exhibit their support without a mandate. For example, one interview shared, “Our administrators and executives around the university system, they’re not pushing it down the throats of faculty, but at the same time, they actually want faculty to adopt these things. They think it’s a good idea. And so, the OER leads know that administrators around the system support the idea.” This approach is the ideal but often requires a shift in campus culture.

The administrative attitude most helpful to the success of an OER program was described by one participant in this way: “To have library administration support taking time away from other initiatives is really important.” Time is very important for those managing OER programs and for faculty wanting to implement OER, but money is also important. OER are free to use

but not free to produce, adopt, or adapt. Some recognition of OER in promotion and tenure documents signals to faculty that there will be no negative repercussions for evaluating or using OER. At one institution “the provost would say, ‘You can put this on your faculty growth plan if you participate in reviewing and/or adopting OER.’ The faculty liked that, and so [they] counted it as a book review.” This type of support mechanism encourages faculty to use—or at least consider—evaluating OER for use in their courses.

Participants from seven institutions mentioned that they were successful in getting OER or OA included in promotion and tenure documents or into either the institution or library strategic plan. While ideal, it is obvious by the low number of interviews that mention this aspect that this goal is still a work in progress for most institutions. The following are two examples of success shared by interviewees:

Interviewee A:

Two years ago, the top-level promotion and tenure criteria were revised. The university took a new look at what categories scholarship could be broken down into. Two important things came out of that process. One of them is that rather than insisting on traditional peer review as the method to determine whether something is scholarly, [the category] was expanded to “peer validation,” with “often peer review” in parentheses. So there was some flexibility put in there.

We were able to get the examples to specifically include openly licensed textbooks or other materials that are purely validated by a disciplinary appropriate process.

Interviewee B:

In early 2019, they ratified our new strategic plan for the university, [one] which the provost spearheaded, and [one] that actually formalized OER in the strategic plan. One of our aspirations . . . is that 50% of all our course offerings will have some form of OER in them.

Limitations and Discussion

Despite trying to reduce the survey's length before its dissemination, we realize now that we could have eliminated its "working on implementing other components" section. At the time of the survey (i.e., during the COVID-19 pandemic), it was difficult for participants to respond, as most institutions were in the midst of providing services in a new and more intense way. In addition, some of the component options in the survey were so common the responses did not provide any additional understanding. For example, interlibrary loan and library database subscriptions are services almost all libraries provide. Other services such as course reserve often exist, but not as services connected to the concept of affordability. These are some reasons that may have contributed to low survey response and completion rates.

This research was done during a very chaotic time for academic institutions and for the world. The pandemic shifted the work and mindsets of not only those who were forced to move instruction online but also those who support instructors. The primary purpose of the research was to look for correlations between institutional characteristics and OER program components. The research process presented a variety of challenges. First, the time to complete a survey or to be interviewed was at a premium and a lack of time likely impacted the survey's response rate as well as the response content. The small number of survey participants is a potential limitation to the survey results. In addition, the survey distribution was limited to email lists already associated with OER communities. Future scholars should reach out to representatives at institutions not associated with these OER communities.

Despite simplifying the Carnegie Classification categories, we found no significant correlations between program components and Carnegie Classification. We believe this lack of positive correlation is due in part to the fact that each Carnegie Classification represents many institutional variables, including number of students, nonprofit or for-profit status, and public or private status. Despite Carnegie Classification being the primary impetus for this research, other characteristics did shed some light onto program implementations and component relationships.

Since our research interviews took place during a pandemic, the dis-

cussions were most certainly impacted by current events. Performing follow-up research to confirm or negate our results would help scholars understand not only the results of this research, but also the changes or adjustments OER programs have undergone in a post pandemic world.

Conclusion

The purpose of this research was primarily to explore correlations between institutional characteristics and OER program components as well as correlations between the individual OER program components themselves. We also discovered repeated themes from the interviews relating to OER successes and challenges. The results were intended to help institutions as they consider implementing OER program components. Implementing OER programs can be difficult but seeing other institutions can facilitate successful implementations at other institutions.

Results show that either no correlations between institutional characteristics and OER program components exist or that more research is needed to confirm the relationships. However, there is a strong relationship between the existence of a training/workshops component and all other program components. The presence of a grant/stipends component is also a strong indicator of the existence of oth-

er program components. These results suggest that beginning with these two components increases the likelihood of success with all others.

The interviews show that OER programs at many institutions are experiencing similar challenges. No one is alone in the challenges faced with implementing OER in higher education. In fact, knowing the common themes of implementation can help mitigate those same challenges on another campus. These themes—relationships, persistence/patience, a focus on affordability, COVID-19, faculty perceptions, personnel volatility, a focus on DEI, and administrative support—represent how OER programs are implemented on campuses. They represent institutions of all sizes and compositions, meaning that similarities can be found with other institutions working toward OER program implementation.

The interviews and survey surfaced a lot of institutional data that may be useful to others beginning or modifying an OER program. With this data we developed a database of Institution Profiles located at https://atom.lib.byu.edu/oer_profiles/. Using the database is an opportunity to explore institution similarities using the listed program components and highlights of how OER leaders found success. While the database contains only 23 institution profiles, we hope to expand the database with other institutions.

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Conflict of Interest Statement

There are no known conflicts of interest for either the PI or RA.

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APPENDIX A

Survey questions

Institutional OER/Affordability Program Description – Abbreviated

Implied Consent Statement

Research Title: *Developing a Model/Framework for OER Implementation in Higher Education*

This research study is being conducted by Michael Whitchurch, Digital Learning Services Librarian at Brigham Young University to explore your institution demographics and the components of your OER/Affordability program.

You have been invited to participate as a leader in OER/Affordability on your campus. The study consists of a survey of up to 20 questions that will take approximately 15 minutes to complete, and a potential follow-up interviews that will be audio recorded, transcribed and coded. There are minimal risks for participation in this study.

There are no direct benefits to subjects for participating. The benefits of participating include informing the resulting framework which may benefit the implementation of OER/Affordability programs. Involvement in this research project is voluntary. You may withdraw at any time without penalty or refuse to participate entirely. There will be no reference to your identity at any point in the research.

The completion of this survey implies your consent to participate. If you choose to participate, please complete the survey by 30 April 2020.

If you have questions regarding this study, you may contact Michael Whitchurch at 801-422-6345 or michael_whitchurch@byu.edu. If you have questions regarding your rights as a participant in research projects, you may contact:

IRB Administrator
A-285 ASB
Brigham Young University
Provo, UT 84602
(801) 422-1461
irb@byu.edu

Definitions

OER: “Open Educational Resources are teaching, learning and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation

and redistribution by others with no or limited restrictions.”--William and Flora Hewlett Foundation (<https://hewlett.org/strategy/open-educational-resources/>)

Affordability: Any effort to reduce or eliminate course materials costs (e.g. reduced cost textbooks, course reserve, etc.)

Program: Comprising all institutional efforts encouraging the use of OER or affordable course materials

Program Component: Individual activities in place that contribute to the overall program

Information about your institution for comparison to similar institutions.

What is the name of your institution? (used to gather other data such as FTE and Carnegie Classification)

Does your institution have an Open Access Policy?

- ☐ Yes
- ☐ No
- ☐ Unsure

Does your institution have an OER Policy?

- ☐ Yes
- ☐ No
- ☐ Unsure

Is OER/Affordability part of the University Strategic Plan?

- ☐ Yes
- ☐ No
- ☐ Unsure

Does your institution have a working group, committee, or other group to coordinate OER/Affordability efforts?

- ☐ Yes
- ☐ No
- ☐ Unsure

Information about your OER/Affordability program and components.

Where does the OER/Affordability program management/administration reside?

- ☐ Library
- ☐ Center for Teaching and Learning
- ☐ Campus IT
- ☐ Campus Administration
- ☐ Other _____

How long has your institution had an OER/Affordability program?

- ☐ Less than one year
- ☐ 1-3 years
- ☐ 3-5 years
- ☐ 5-10 years
- ☐ More than 10 years
- ☐ Unsure

What are the current active components of your OER/Affordability program? (Please select all that apply.)

- ☐ Open Textbooks--Adoption, Adaptation, Creation
- ☐ Interlibrary Loan
- ☐ Course Reserve
- ☐ Inclusive Access
- ☐ Grant program
- ☐ Publishing program
- ☐ Accessibility review
- ☐ Print on Demand
- ☐ Ancillary content development

- ☐ Library subscriptions–eBooks
- ☐ Library subscriptions–journals
- ☐ Training program/Workshops
- ☐ OER plus a homework system or adaptive platform
- ☐ Other _____

If you are working on implementing other components, what are they? (Please select all that apply.)

- ☐ Open Textbooks–Adoption, Adaptation, Creation
- ☐ Interlibrary Loan
- ☐ Course Reserve
- ☐ Inclusive Access
- ☐ Grant program
- ☐ Publishing program
- ☐ Accessibility review
- ☐ Print on Demand
- ☐ Ancillary content development
- ☐ Library subscriptions–eBooks
- ☐ Library subscriptions–journals
- ☐ Training program/Workshops
- ☐ OER plus a homework system or adaptive platform
- ☐ Other _____

APPENDIX B

Interview questions

- Briefly describe the project, especially the definitions
- What program components do you have currently?
- Do you have other program components?
- What have been the more successful components of your OER program?
- What do you believe contributes to that success?
- What have you tried to implement but been unsuccessful? What contributed to that?
- How do you define success of these components?