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Digital Initiatives Symposium

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Apr 29th, 1:00 PM - 4:00 PM

## Creating a Results-Driving OER Initiative: Writing a Strategic Plan to Market and Encourage OER and See Results

Nicole Finkbeiner  
*Rice University*

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## **Creating a Results-Driving OER Initiative: Writing a Strategic Plan to Market and Encourage OER and See Results**

### **Presenter 1 Title**

Director of Institutional Relations

### **Session Type**

Workshop

### **Abstract**

In this hands-on workshop, Nicole Finkbeiner will utilize her experience working with colleges and universities across the country to outline the key components of a successful OER initiative. She'll cover key metrics, real-world examples of successful strategies, and suggestions on how to adapt an OER initiative to your specific budget and campus culture. Participants will be provided with a worksheet that they will use throughout the workshop to develop a highly-customized plan to increase use of OER at their institutions.

### **Location**

KIPJ Room C




# Marketing and Encouraging OER

Photo by Gilles  
Lambert on Unsplash

Nicole Finkbeiner, Director, Institutional Relations  
[nicolef@rice.edu](mailto:nicolef@rice.edu), [@nfinkbeiner](https://twitter.com/nfinkbeiner), [@openstax](https://twitter.com/openstax)





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“”

Source: William and Flora Hewlett Foundation  
(underlining added)

**Clearly define  
your goal**

**Specific  
Measurable  
Actionable  
Relevant  
Time Limited**

# Measure Outcomes, Not Actions

## **Outcomes. Measure success by these:**

- # of faculty using OER
- # of students impacted by OER
- \$ amount of savings to students (\$79.37)
- Student success (grades, completion, etc.)

## **Actions, that contribute to, but don't equal success:**

- Holding a meeting
- Having a workshop
- # of people who attended meeting/workshop
- Having a display





Quality goal?

**We want people to  
stop smoking.**

# Quality goal?

**90% of the Harris County population will be a non-smokers by January 1, 2020.**



# Quality goal?

**We want people to know about our event.**

**Quality goal**

**ant people to  
about our**

**Photo by Arwan  
Sutanto on Unsplash**



# Quality goal?

**We want a  
minimum of 50  
faculty to attend  
our workshop on  
February 1.**



# Quality goal?

**We want to  
increase OER on  
our campus.**

# Quality goal?

**Save our students  
\$5 million in  
5 years with OER  
- Maricopa Millions**

**But I don't  
know who is  
using OER at  
my  
institution?**

### **Ways to find out:**

- Ask me to email you a report of who is using an OpenStax text (nicolef@rice.edu)
- Send-out an email
- Send-out a survey
- Ask your bookstore





Photo by Oscar  
Sutton on Unsplash

**But I don't  
know who is  
using OER at  
my  
institution?**

### **Ways to find out:**

- Ask me to email you a report of who is using an OpenStax text ([nicolef@rice.edu](mailto:nicolef@rice.edu))
- Send-out an email
- Send-out a survey
- Ask your bookstore

### **Caution!**

- Don't get stuck at this step. Some schools get stuck here for more than a year!
- Do the best you can in 2 weeks and then move on.
- Increasing the accuracy of OER reporting is something you can do slowly.



**Exercise:**  
**Take 10 minutes and**  
**write -out your goal(s).**  
**Share with those**  
**around you**



# Identify your main target markets





Identify your  
target  
markets

**My target market is  
everyone!**



Physiology  
Physiology  
Physiology

Psychology  
Psychology  
Psychology

Psychology  
Psychology  
Psychology

lo  
ta  
m

Photo by Ayo  
Ogunseinde on Unsplash



\$

onstax™





Identify your  
target  
markets

**80/20 rule:**

**80% of your  
business comes  
from 20% of your  
clients**

# Identify your target markets: Which faculty?

## **ROI with faculty advocacy steps:**

1. Find out your top 25 highest-enrolled courses
2. Identify which of those courses have high-quality OER alternatives.
3. Identify the faculty who teach full-time or teach multiple sections for the list of courses from #2.
4. Focus on the faculty from #3.

## **Other faculty groups to consider:**

- “Early adopters” of new ideas
- New faculty
- Faculty who are influencers for other faculty

**Identify your  
other target  
markets:  
Who do you  
need on the  
advocacy  
bus?**

- Administrators
- Librarians
- Instructional Support
- At least one Senior Administrator who is willing to regularly promote the initiative
- Bookstore
- Disability Services
- Students






Photo by Sharon  
Garcia on Unsplash

Pick only a few  
target markets at a  
time, otherwise  
you'll stretch  
yourself too thin!

Prioritize your target  
markets: Focus on  
those that have the  
most influence to  
the least influence.




**Exercise:**  
**Take 5 minutes and write -**  
**out your top 5 target**  
**markets**  
**(today's worksheet, page 6, column 1**  
**only)**



Goals are different for  
each target market  
(with some exceptions,  
but start with this assumption)





Question: What do  
you ultimately want  
them to do?

**Clearly define  
your goal**

**Specific  
Measurable  
Actionable  
Relevant  
Time Limited**



# Quality goal?

**We want people to  
know about our  
event.**

**No!**



# Exercise:

Take 5 minutes and write -out  
your ultimate goal for each  
target market  
(today's worksheet, page 6, column 2 only)

# Direct vs. Indirect Tactics

## Direct tactics

Should result in one or more faculty members saying:

- Yes
- No
- I'm interested, tell me more

You should be able to track, for each direct tactic:

- Faculty who expressed interest (aka “leads”)
- Faculty who adopted
- New students impacted

## Indirect tactics

“If you build it, they might find it”

Does not result in you getting a yes, no, or I'm interested from faculty

Helpful, but should not be your main focus

# Top Tactics to Increase Adoptions

(number of new students impacted)

2-year colleges	4-year colleges
1) OER grant program	1) OER grant program
2) Presentations during department meetings	2) One-on-one meetings with faculty to ask them to adopt.
3) Presentations during all faculty meetings. Passing around a sign-up sheet	3) OER training workshops
4) One-on-one meetings with faculty to ask them to adopt.	4) Engage faculty who have adopted OER and ask them to introduce you to colleagues who may also consider OER

## Research notes:

- Thank you to Debshila Basu Mallick, PhD, Cognitive Science Postdoctoral Associate at Rice University, OpenStax, for the analysis
- n = 11 colleges and universities who participated in the OpenStax Institutional Partner Program during the 2017-2018 year.
- Top tactics determined by new students impacted per year (confound: favors larger institutions) by each tactic



# Top Tactics to Increase Adoptions

## (number of new adoptions)

2-year colleges	4-year colleges
1) Presentations during all faculty meetings. Passing around a sign-up sheet	1) OER grant program
2) One-on-one meetings with faculty to ask them to adopt.	2) One-on-one meetings with faculty to ask them to adopt.
3) Presentations during department meetings*	3) OER on-demand, self-paced training for faculty with stipends**
4) OER Grant Program*	4) Engage faculty who have adopted OER and ask them to introduce you to colleagues who may also consider OER

### Research notes:

- Thank you to Debshila Basu Mallick, PhD, Cognitive Science Postdoctoral Associate at Rice University, OpenStax, for the analysis
- n = 11 colleges and universities who participated in the OpenStax Institutional Partner Program during the 2017-2018 year.
- Top tactics determined by new faculty adoptions (confound: favors larger institutions) by each tactic
- \*The number of adoptions drops significantly between tactic 2 and tactic 3 for 2-year colleges
- \*\*Only completed by one university

# Direct vs. Indirect Tactics

Consider the number/frequency of the tactic

- 1 workshop probably wouldn't count, but 4 workshops would.
  - Depends on how many faculty attend the workshop. If you have one workshop that 70 faculty attend, that would count.
  - Need to offer multiple workshops to accommodate faculty schedules.
- Presenting at 1 department meeting wouldn't count, but presenting at 5+ department meetings would.
- Attempting to have one-on-one meetings with 5 faculty wouldn't count, but attempting to have 25 one-on-one meetings would.



# Social Norms and Bystander Effect

# Maximizing your follow -ups and responses

- Ask people individually, not as a group
  - Don't send out group follow-up emails
- Make each individual “ask” as personal as possible
  - Begin your email with their name.
  - Send them only OER that is relevant to them.  
Max of 3 options to begin with.
- Sign-up sheets:
  - Have individual sign-up sheets on each table vs. passing one around
  - Don't have a sign-up sheet “on a table so people can sign up as they walk out.” It takes more effort and they often forget.
  - Have the sign-up sheets where they can take immediate action.
  - If you must pass around a sign-up sheet, make sure you hand it first to someone who will sign up.





**Exercise: 5 minutes**

**Write down your OER efforts from last year. Were they direct or indirect tactics?**

**(let's do a few together and then on your own)**

# Go to them vs. asking them to come to you

## Go to them:

- Visiting them at their offices
- Presenting at all-faculty meeting days
- Presenting at department meetings
- Presenting at new faculty orientations
- Attending faculty events

## Asking them to come to you:

- Holding workshops in your area
- Asking them to make an appointment with you in your office or area
- Asking them to check-out your website, libguide, etc.



## Exercise: 5 minutes

Go back to your list of what you did last year. Identify if each tactic was you going to them or asking them to come to you.

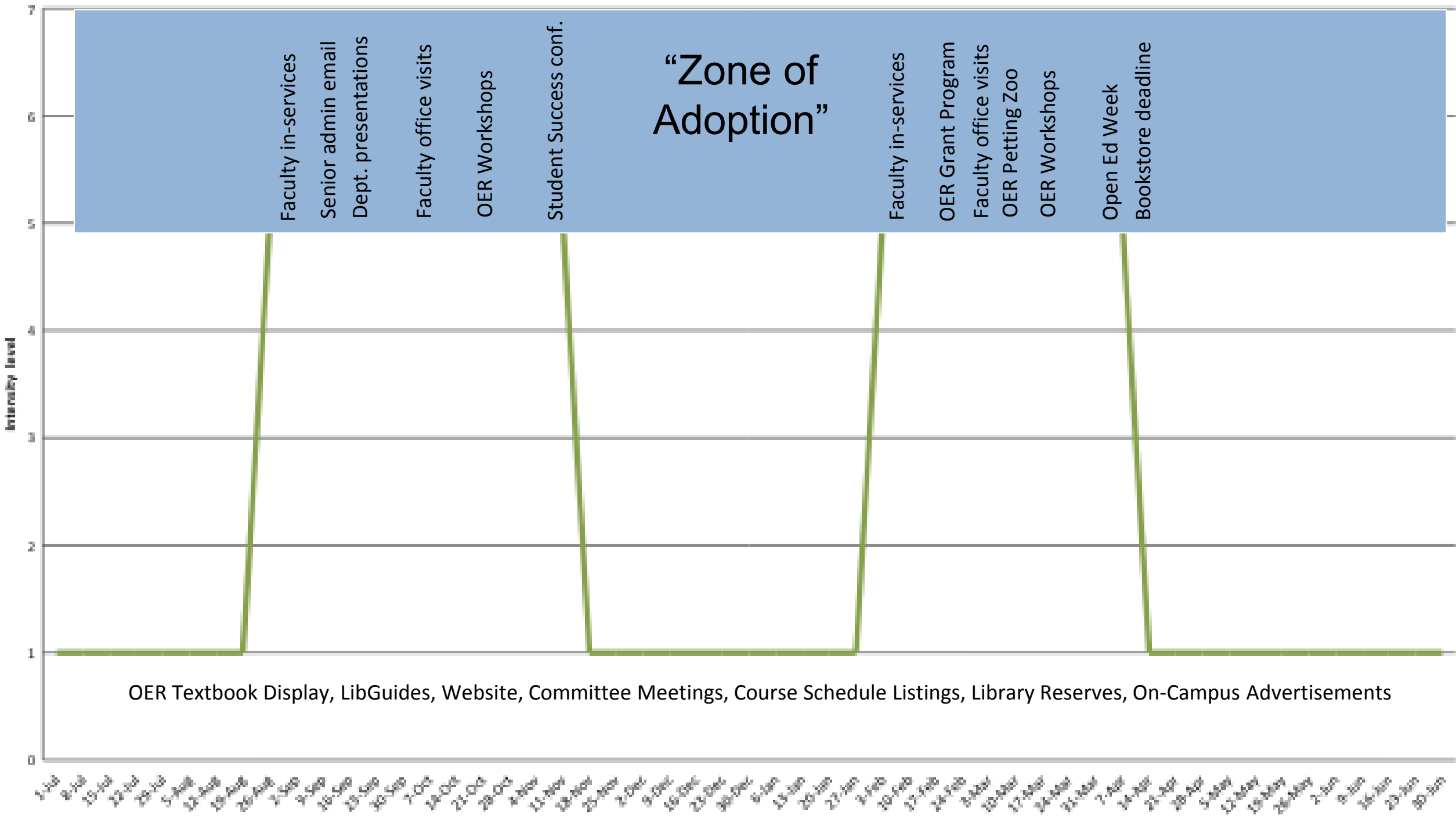
(let's do a few together and then on your own)

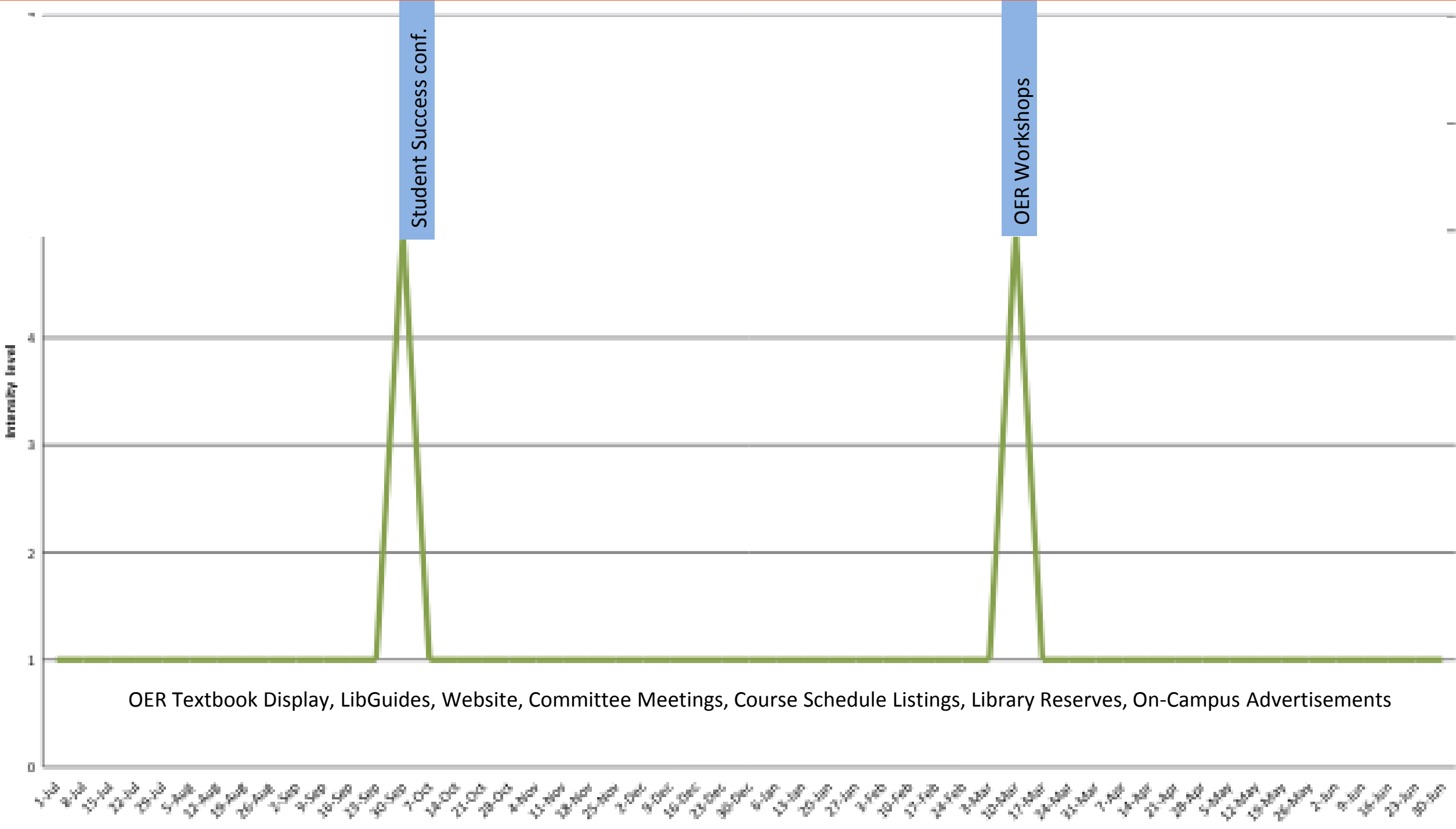
Complete at least  
8 direct tactics  
within one year  
(August – April)

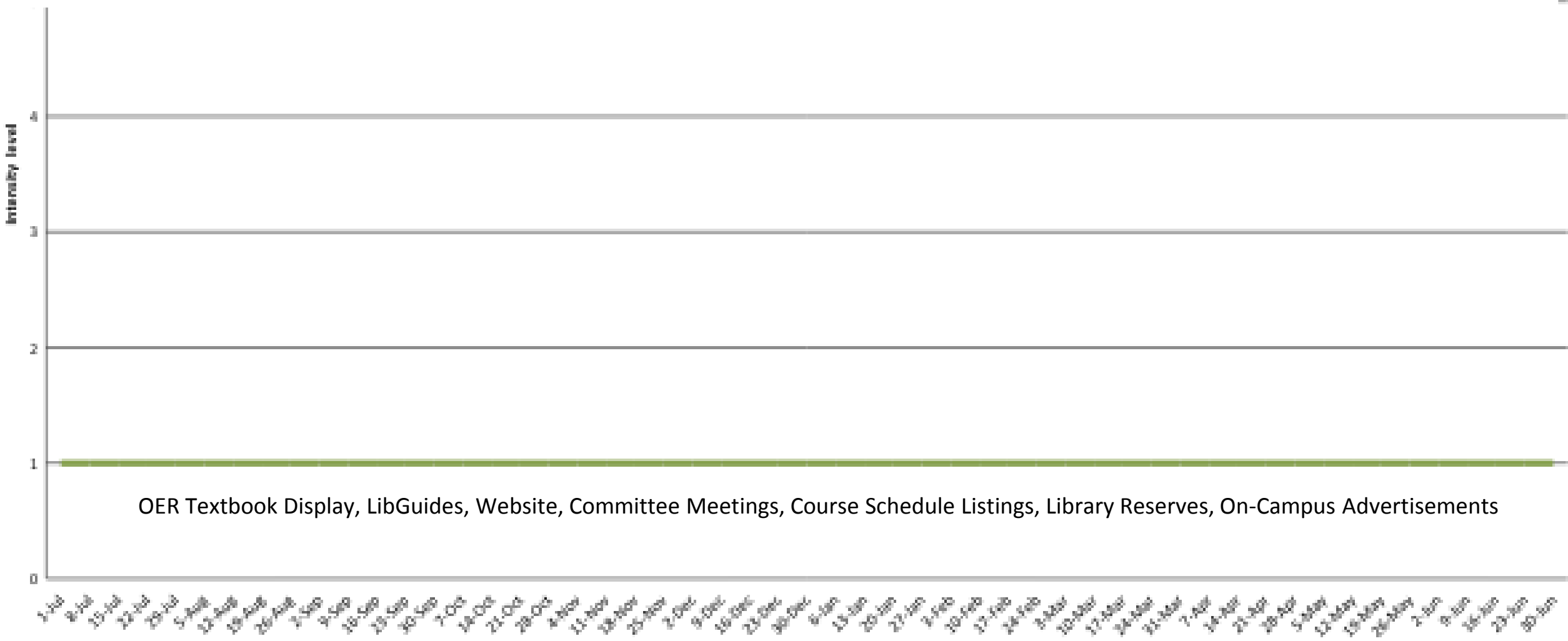


"8 Ball" by Jarno, via  
OpenClipArt.org











## Exercise:

1) Count up your direct tactics, how many did you do last year?

2) Draw your chart from last year, what does it look like?



**“An effective goal focuses on results, not activity”**

Stephen R. Covey  
7 Habits of Highly Effective People

## Measure outcomes, not actions

### Outcomes

- # of faculty using OER
- # of students impacted by OER
- \$ amount of savings to students (\$79.37 average)
- Student success (grades, completion, etc.)

### Actions

- Holding a meeting
- Having a workshop
- Having a display

# For every high intensity/direct action, goal-set & track 3 things:

- Faculty interest
- Faculty adoptions
- Students impacted




# Measure outcomes, not actions

“We presented at 10 department meetings (185 faculty total) and 8 faculty expressed interest right away. From those 8, so far, 2 have agreed to adopt OER for their courses, a total of 500 students per year impacted.”

Action: Present at department meetings

Goal: 25 interested faculty from presentations

- Number of faculty interested so far: 8 (out of 185)
- Adoptions so far from action: 2
- Students so far from action: 500 per year



**If a direct action isn't resulting  
in new interest or adoptions,  
stop and refocus on  
actions that are working**



# Features vs. benefits

Features are something about your product or service

Benefits are what your target market gains from your product or service

# Features vs. benefits

- Start by naming something about your product or service.
- Now, pretend that you are talking to your target market and finish the sentence by saying “so you can...” and adding an ending



# Features vs. benefits

Imagine your target market  
saying to you:

Why should I care?

# Feature or benefit?

With the \$100 per month you'll be saving each month, you could do something fun with your family.





# Feature or benefit?

Our department's mission statement is...

# Feature or benefit?

Dr. Jane Doe has her degree from Michigan State University.

**Go Green!**

# Feature or benefit?

You'll be able to move forward on day-one of your course with your learning objects, because there's no excuse for the student to not have the book.



# Feature or benefit?



Photo by Alexandr Podvalny on Unsplash



# Feature or benefit?

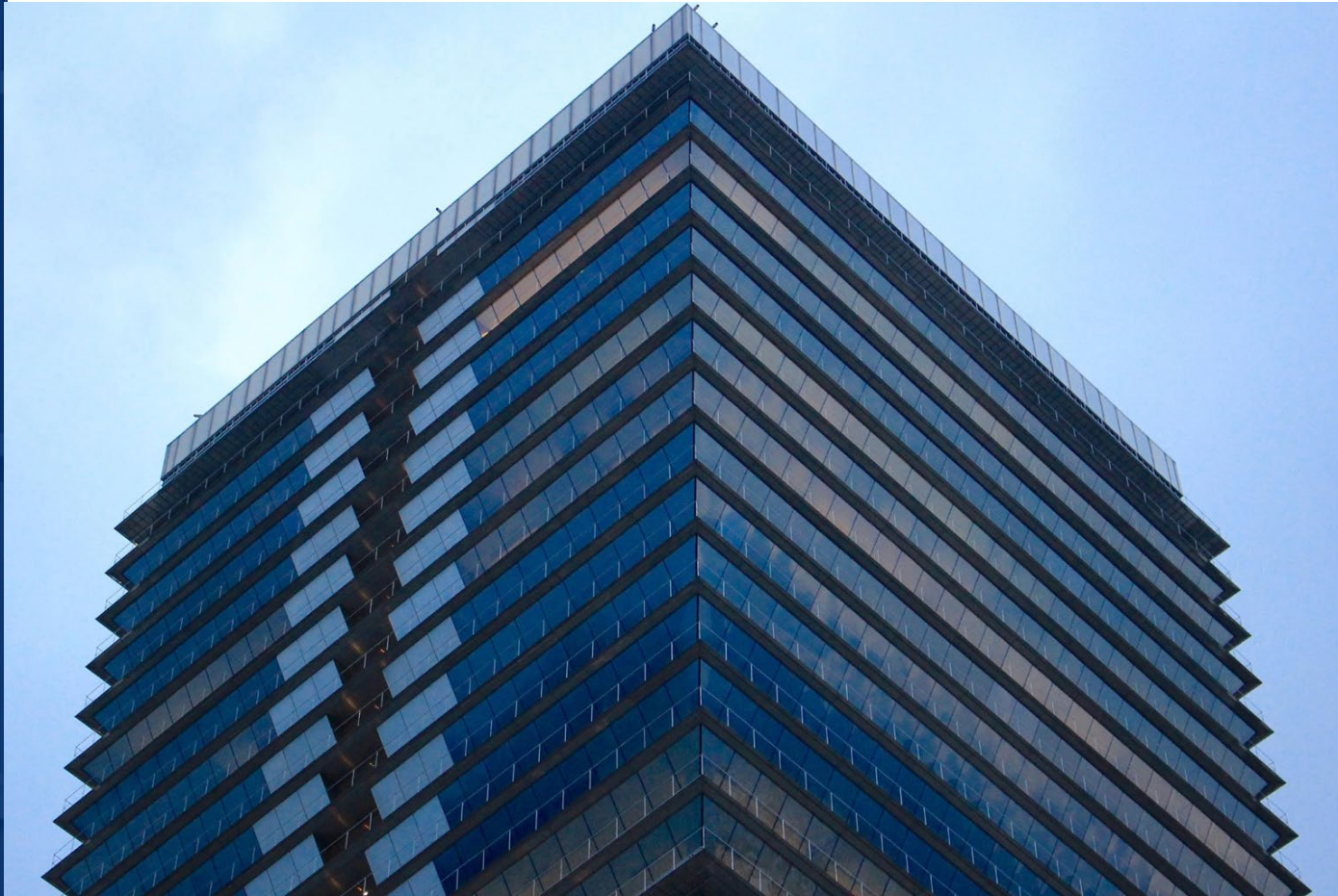


Photo by Arnaud Jaegers on Unsplash



# Academic Freedom and OER

- Every student has immediate & unlimited access
- Standard scope & sequence makes it easy to adopt
- Variety of technology partners allow choice
- Permission free use, editing & adaptation
- Variety of formats/partners eliminates one size fits all
- Ownership of the content. Forever
- Moving to a new edition is optional



# Exercise:

Take 5 minutes think about your OER messages last year, did they focus on features or benefits?



## Exercise:

Take 10 minutes and identify the top 4 benefits for each of your target markets. Share with those around you. (today's worksheet, page 6, column 3 only)

Identify  
when/how  
your target  
markets are  
mostly likely  
to listen



"listen to ME!" by Jonathan Powell, via  
Flickr Creative Commons is licensed under CC BY 4.0





# Identify when/how your target markets are mostly likely to listen

## Consider

- Messaging medium (presentation, email, posters, etc.)
- Location
- Timing
- Who delivers the message



# Think beyond emails!






# Exercise:

Take 5 minutes to identify  
when/how each target  
market is most likely to  
listen

(today's worksheet, page 6, column 4 only)



Putting it all together:  
Create a message based  
on the benefit and target  
market chosen that fits  
the medium



Short-term, interim goals:  
What you want them to do from  
a specific communication



One goal  
per communication





# One goal per communication:

**Attend our OER workshop on  
September 19**



# One goal

Joe will feel left out if I don't include his stuff too

# per communication:

**Attend our OER workshop on  
September 19**



# One goal

Joe will feel left out if I don't include his stuff too

# per communication:

**Attend our OER workshop on  
September 19**

*But I also want to tell them about my other programs*



One goal

Joe will feel left out if I don't include his stuff too

per communication:

Attend our OER workshop on  
September 19

BUT I ALSO WANT TO TALK TO ANOTHER TARGET MARKET

But I also want to tell them about my other programs



One goal

Joe will feel left out if I don't include his stuff too

per communication:

Attend our OER workshop on

September 19,

webinars

Oh, also, we're holding

BUT I ALSO WANT TO TALK TO ANOTHER TARGET MARKET

But I also want to tell them about my other programs



One goal

Joe will feel left out if I don't include his stuff too  
per communication:

Attend our OER workshop on

September 19

webinars

Oh, also, we're holding

I know you said not to put your mission statement in here but...  
But I also want to tell them about my other programs  
BUT I ALSO WANT TO TALK TO ANOTHER TARGET  
MARKET

One goal

Joe will feel left out if I don't include his stuff too

per communication:

Attend our CUEK workshop on

Our center is also doing some

other cool stuff, want them

to know about

we're holding

webinars

I know you said no

But I also want to tell them about my other programs



One contact (preferably  
direct) per  
communication

**Please email Nicole at [nicolef@rice.edu](mailto:nicolef@rice.edu) if  
you're interested in exploring OER for  
your courses**



# One contact (preferably direct) per communication

**Please email Nicole at [nicolef@rice.edu](mailto:nicolef@rice.edu) if  
you're interested in exploring OER for  
your courses**

One contact (preferably  
direct) per  
communication

But I also want them to be  
able to check-out my

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your courses



One contact (preferably  
direct) per

But I also want them to be  
communication

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office email Nicole at nicole@rice.edu if  
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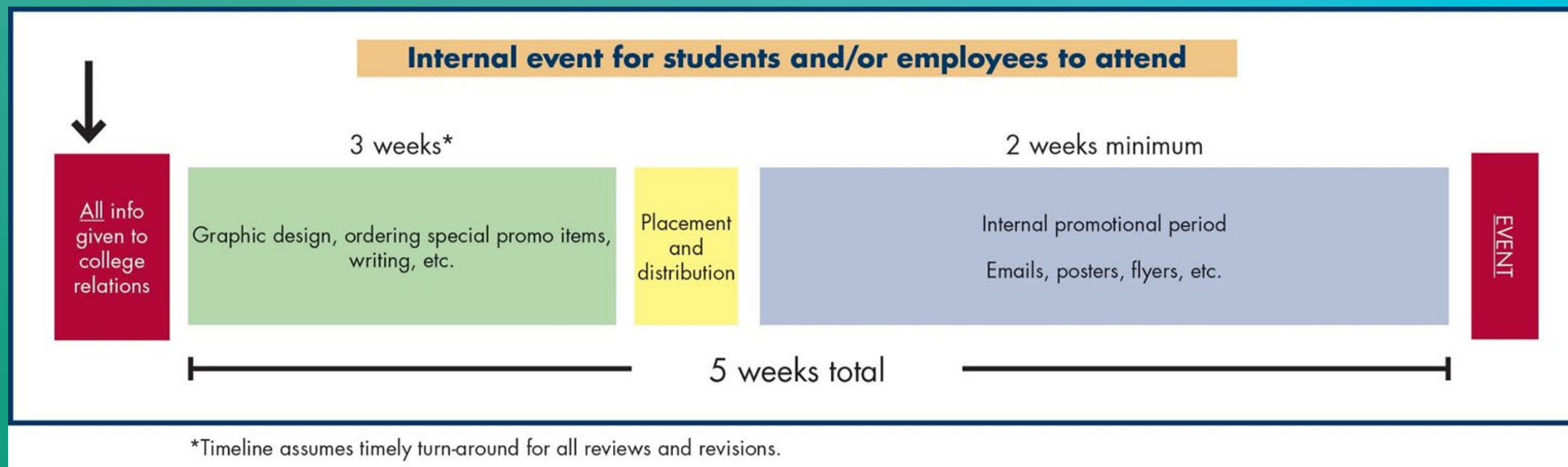
One contact (preferably

direct)

communication

Please email Nicole at [nicole@rice.edu](mailto:nicole@rice.edu) if  
you're interested in exploring OER for  
your courses

# Marketing timelines





# Exercise:

Put it all together! Map -  
out some of your direct  
tactics and your  
marketing related to them.





Keep your  
messaging positive



Don't focus solely  
on cost/savings



# Focus on faculty academic freedom

# Academic Freedom and OER

- Every student has immediate & unlimited access
- Standard scope & sequence makes it easy to adopt
- Variety of technology partners allow choice
- Permission free use, editing & adaptation
- Variety of formats/partners eliminates one size fits all
- Ownership of the content. Forever
- Moving to a new edition is optional



And on student  
access/freedom



# Student benefits of OER beyond cost

**Open Licensing** means students have the freedom to access their content:

Wherever they want

- Different formats for different devices and situations
- Share on social networks and public forums
- Share in blended learning environments

Whenever they want

- Instant, unlimited access
- Permanent access, they own the content forever

However they learn

- Use content in their work legally
- Make videos/class assignments legally
- Put into a format that meets their study habits

# Post-course student access to core content matters

- Multi-semester courses
- Retaking the course
- Reference for advanced courses
- Studying for higher education entrance exams & certification exams
- Changing careers
- Lifelong learning

Any of the above could mean a student needs to purchase another access code or rent the content again



How does this help  
students learn?



28 hours working a  
minimum wage job to purchase  
a single \$200 textbook

“”

“Covering the Cost,” Ethan Senack and Robert  
Donoghue, The Student PIRGS, February 2016



**65% of students said that they  
had decided against buying a  
textbook because it was too  
expensive**

“”

“Fixing the Broken Textbook Market” by  
U.S. PIRG Educational Fund, January 2014



# Efficacy research

Increase number of credits taken

- [Fischer et al \(2015\)](#). Students enrolled in OER courses took more courses in the semester they used OER and the following semester after the use of OER.
- [Robinson \(2015\)](#)

Lower withdrawal rates

- [Feldstein et al. \(2012\)](#)
- [Hilton and Laman \(2012\)](#)
- [Wiley et al. \(2016\)](#)

# OER and Equity

	Change Grade	Change DFW
All Students	+8.6%	-2.68%
Non-Pell Eligible	+7.4%	-2%
Pell Eligible	+12.3%	-4.4%
Non-White	+13%	-5%
Part-Time	+28%	-10%

**n = 21,822 students**

AAC&U, University of Georgia  
*The Impact of Open Educational Resources on Various Student Success Metrics,*  
in International Journal of Teaching and Learning in Higher Education, 2018

# Efficacy research

Analysis by John Hilton,  
Brigham Young University

11 peer-reviewed studies

48,623 students

93% of students did as well  
or better using OER

- “As well” is still a win with students saving \$

# My favorite OER sites

OpenStax  
OpenStax.org  
(I know, you're SHOCKED 😊)

Open Textbook Library  
[Open.UMN.edu/opentextbooks](https://open.umn.edu/opentextbooks)

USG Core Curriculum Courses  
[affordablelearninggeorgia.org/find\\_textbooks/core\\_courses](https://affordablelearninggeorgia.org/find_textbooks/core_courses)

CCCOER Listserv  
[www.ltcconline.net/greenl/oer/oerlistfromlistserve.htm](http://www.ltcconline.net/greenl/oer/oerlistfromlistserve.htm)

# My favorite OER sites

Mason OER Metafinder  
[oer.deepwebaccess.com](http://oer.deepwebaccess.com)

OER Commons  
[oercommons.org](http://oercommons.org)

CNX  
[cnx.org](http://cnx.org)

MERLOT  
[Merlot.org](http://Merlot.org)





# Questions?

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Lambert on Unsplash

Nicole Finkbeiner, Director, Institutional  
Relations

[nicolof@rice.edu](mailto:nicolof@rice.edu) [@nfinkbeiner](https://www.linkedin.com/in/nfinkbeiner) [@openstax](https://www.linkedin.com/company/openstax)

