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

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This workshop is available at Digital USD: [https://digital.sandiego.edu/symposium/2019/2019/5](https://digital.sandiego.edu/symposium/2019/2019/5)
Marketing and Encouraging OER

Nicole Finkbeiner, Director, Institutional Relations
nicolef@rice.edu, @nfinkbeiner, @openstax

Photo by Gilles Lambert on Unsplash
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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:

We want people to know about our event.
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
But I don't know who is using OER at my institution?

Ways to find out:

• Number of faculty using OER
• Number of students impacted by OER
• Amount of savings to students ($98.57)
• Student success (grades, completion, etc.)
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

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!
Identify your target markets

My target market is everyone!

Photo by Ayo Ogunseinde on Unsplash
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
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.
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)

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

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<tr>
<td>3) Presentations during department meetings*</td>
<td>3) OER on-demand, self-paced training for faculty with stipends**</td>
</tr>
<tr>
<td>4) OER Grant Program*</td>
<td>4) Engage faculty who have adopted OER and ask them to introduce you to colleagues who may also consider OER</td>
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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)
"Zone of Adoption"

OER Textbook Display, LibGuides, Website, Committee Meetings, Course Schedule Listings, Library Reserves, On-Campus Advertisements
OER Textbook Display, LibGuides, Website, Committee Meetings, Course Schedule Listings, Library Reserves, On-Campus Advertisements
OER Textbook Display, LibGuides, Website, Committee Meetings, Course Schedule Listings, Library Reserves, On-Campus Advertisements
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
“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...
Dr. Jane Doe has her degree from Michigan State University.
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?
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
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 per communication:

Attend our OER workshop on September 19

Joe will feel left out if I don’t include his stuff too.
One goal per communication:

Attend our OER workshop on September 19

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

But I also want to tell them about my other programs.
One goal per communication:
Attend our OER workshop on September 19

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

But I also want to tell them about my other programs

BUT I ALSO WANT TO TALK TO ANOTHER TARGET MARKET
One goal per communication:

We’re holding webinars.

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

But I also want to talk to another target.

But I also want to include Joe’s stuff too.

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

Attend our OER workshop on September 19.
One goal per communication:

Attend our OER workshop on September 19.

Oh, also, we’re holding webinars.

Joe will feel left out if I don’t include his stuff too.
One goal per communication:

Attend our OER workshop on September 19.

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

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

I know you said we’re doing something else.

But I also want to talk to them about my stuff.

We’re holding onto the workshops.

One goal per communication:

Tell them about my other programs.

Joe will feel left out if I don’t include his stuff too.
One contact (preferably direct) per communication

Please email Nicole at nicolef@rice.edu if you’re interested in exploring OER for your courses
One contact (preferably direct) per communication.

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One contact (preferably direct) for more communication. Please email Nicole at nicolef@rice.edu if you’re interested in exploring OER for your courses.
Marketing timelines

Internal event for students and/or employees to attend

- All info given to college relations
  - 3 weeks*
  - Graphic design, ordering special promo items, writing, etc.
  - Placement and distribution
  - 2 weeks minimum
  - Internal promotional period
  - Emails, posters, flyers, etc.

5 weeks total

*Timeline assumes timely turn-around for all reviews and revisions.
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
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

<table>
<thead>
<tr>
<th></th>
<th>Change Grade</th>
<th>Change DFW</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Students</td>
<td>+8.6%</td>
<td>-2.68%</td>
</tr>
<tr>
<td>Non-Pell Eligible</td>
<td>+7.4%</td>
<td>-2%</td>
</tr>
<tr>
<td>Pell Eligible</td>
<td>+12.3%</td>
<td>-4.4%</td>
</tr>
<tr>
<td>Non-White</td>
<td>+13%</td>
<td>-5%</td>
</tr>
<tr>
<td>Part-Time</td>
<td>+28%</td>
<td>-10%</td>
</tr>
</tbody>
</table>

n = 21,822 students
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

- USG Core Curriculum Courses
  - affordablelearninggeorgia.org/find_textbooks/core_courses

- CCCOER Listserv
  - www.ltcconline.net/greenl/oer/oerlistfromlistserve.htm
My favorite OER sites

Mason OER Metafinder
oer.deepwebaccess.com

OER Commons
oercommons.org

CNX
cnx.org

MERLOT
Merlot.org
Questions?

Nicole Finkbeiner, Director, Institutional Relations
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