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Problem Statement and Background

Among the many barriers to broader and greater postsecondary attainment, the cost of attendance (COA) stands universally acknowledged and lamented. As a result, policymakers and institutional leaders embrace a wide range of strategies to control and offset rising COAs. One promising cost reduction strategy involves reducing and sometimes eliminating student expenditures for text books and other learning materials by embracing Open Educational Resources (OER) at the classroom, institutional, system, and state levels.

For students, the primary benefit of OER is cost savings. Research pertaining to the cost of attendance indicates that the average annual cost of student texts is around $1220/year. However, there are also other benefits for students.

Studies indicate that students in courses using OER persist and perform at the same or higher levels than those in courses using traditional print materials. Research also indicates that students in z-degree programs persist and complete at higher rates than students in the same degree program using traditional learning materials. Moreover, recent studies suggest that the students who benefit most from the use of OER in their classes are those who are low income (i.e., Pell eligible), first-generation, and/or from a group traditionally underserved by higher education.

> ## Open educational resources
> are teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others. Open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge.
> *– Hewlett Foundation*

The use of OER is a win-win proposition for students, faculty, institutions, and states. OER usage addresses states' desires to reduce the costs of higher education while increasing access to and attainment in higher education. An increasing number of states have passed laws and enacted policies that encourage and underwrite the time and effort necessary to convert courses to those that use OER. However, the bulk of OER work is still conducted at a grassroots level, with individual champions emerging on campuses and doing what they can to build momentum for the use of OER at their institutions. There are many OER efforts unfolding across the Midwest, but most know little about the larger OER landscape in the region or about the efforts of others in their own states.

MHEC's Approach to Increasing OER Implementation in the Midwest

It is with this situation in mind that MHEC decided to start its work with OER from the perspective of those who are already doing the work but would benefit from knowing about, collaborating with, and sharing the work with other OER champions in their states and in the region. In collaboration with WCET, and with partial funding from the Hewlett Foundation, MHEC invited five OER champions from each MHEC member state to attend a three-day Summit in which they pursued the following goals:

GOAL 1: Learn about OER – What are its opportunities and advantages for students?

State participants learned about OER in general, OER efforts within participants' states, and OER efforts in other states in the MHEC region. Also in attendance were representatives from the other three regional higher education compacts who were able to share the status of OER work in their member states.

GOAL 2: Create a State Action Plan – What strategy will work for us and how will we implement it?

State participants will analyze the status of OER efforts in their states, learn about state level strategies that have been successful in other states, and devise coordination and action plans for increasing the use of OER in their states. Action plans will emphasize multilevel approaches and leverage strategies learned from others at the multistate meeting.

GOAL 3: Commit to Follow-up Networking – How do we continue after the workshop?

MHEC will facilitate regular calls among team leaders so they can share their successes, challenges, and questions on an ongoing basis and create a state and regional OER community of practice. MHEC also anticipates providing webinars following the convening to address OER interests, opportunities, and challenges. State participants will continue their implementation work with each other but also with the broader group via monthly phone calls.

The *OER Implementation and Policy Summit for the MHEC States* was held in Chicago from November 28-30, 2018. Over 70 people participated, with more then 60 being actively engaged in OER efforts in their states. State representatives included State Higher Education Executive Officers (SHEEO) staff, legislators, Department of Education staff, university and community college system staff, librarians, institutional faculty and administrators, and students. As mentioned, there were also staff from the New England Board of Higher Education (NEBHE), Southern Regional Education Board (SREB),

and the Western Interstate Commission for Higher Education (WICHE) in attendance. The state teams evaluated the current status of OER efforts in their states, identified constituencies who were missing from the team, and created a 6-month plan to move the state toward increased use of OER.

Post-Summit Assessment and Recommendations

A post-Summit assessment was sent to all participants (70), with responses coming from nearly 50% of them (32). Results from the assessment survey indicate that participants found the Summit to be highly useful and relevant to their work with OER in their states. The results also indicate that the Summit achieved Goals 1 and 2 set out for the Summit. Highlights of assessment results include:

- The three most useful presentations: those by national OER experts (i.e., David Ernst and Nicole Allen) and the panel of student OER champions.
- The three most useful activities: meeting national OER leaders and hearing about OER work across the nation, meeting others from their own states who were also working on OER, and working together with others from their own states to organize a state plan to increase the use of OER in their respective states.
- Participants were pleased with the wide range of people recruited from their states to create a coordinated state OER action plan.

In addition to state action plans, many ideas and requests for regional support were generated at the Summit. In the first half of 2019, MHEC staff will use this list of ideas and requests to help form a 12-month OER plan that will overlay and complement the 6-month plan of follow-up support offered to the state OER teams. Here is a list of the ideas and requests coming out of the Summit:

- Create a common definition of OER among the four regional compacts and share the work of a campaign to learn and use that definition in OER work in the states.
- Organize and host summits at the state level.
- Create a List Server to keep state teams and Summit attendees connected (done 12/7/18)
- Explore a way to have ERP vendors make it easier to mark courses as using OER in course catalogs
- Fund and create a marketing plan to educate faculty, legislators, students, parents, administrators, etc. about OER
- Explore and support the scaling of awards for faculty who use OER and schools that allow OER use to count in the tenure process
- Facilitate faculty and student bootcamps to train them as regional OER ambassadors

- Add "adopter" field to OER repositories so faculty can see who else has chosen to use certain resources

Post-Summit State Actions and Follow-up by MHEC

According to Summit attendees, two of the impediments to OER implementation are relatively straightforward, and they are ones with which MHEC can immediately assist its member states: *time* to organize OER discussions and *awareness* of OER activities. Therefore, the focus of MHEC's OER work in the first half of 2019 will be to take on the work and time commitment to facilitate communication among members of the OER coordination and action teams within its member states. MHEC's efforts will emphasize creating a wider community of OER practice in the Midwest by publicizing OER events, efforts, and research. MHEC's follow-up support will involve but is not limited to the following:

- Establishing and hosting a list server for Summit attendees and additional members of state action teams
- Scheduling and facilitating monthly team conference calls
- Compiling and distributing a monthly regional OER newsletter
- Creating and delivering two webinars on OER-related topics of high interest and high utility
- Assessing the amount and scope of OER awareness and activity in the state in January 2019, with a follow-up assessment of OER awareness and activity in June 2019

In addition, MHEC also plans to move forward with regional level OER work with a 12-month plan which will be presented for funding opportunities in Spring 2019 and carried out from July 1, 2019, through June 30, 2020.