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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.

> ## 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*

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.

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. We invited five OER champions from each MHEC 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 will learn about OER in general, OER efforts within participants' states, and OER efforts in other states in the MHEC region.

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 SHEEO staff, legislators, Department of Education staff, university and community college system staff, librarians, institutional faculty and administrators, and students. 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:

• Have the four regional compacts create a common definition of OER 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
• Faculty and student bootcamps to train them to become 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
- An initial assessment of the amount and scope of OER awareness and activity in the state in January 2019 and an assessment of the change in OER awareness and activity as of 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.

(new content starts here) MHEC OER State Action Team Efforts, January-June 2019

From January 1st through June 30th, 2019, the 12 MHEC OER State Action Teams worked on their initial six-month plans by engaging in a wide range of activities and meetings. Each team met telephonically with MHEC staff between three and five times and met with each other at varying intervals. Membership, repositories, data gathering, and presentations were the primary areas of action taken by the teams during this period.

Team Membership

Most teams invested considerable time and energy in recruiting new team members from a wider range of stakeholders in their respective states. Teams also sought to define and distinguish their roles in states where there were already active OER communities of practice. The focus of recruiting varied widely, with some teams reaching out to HBCUs and Tribal Colleges for representation, others enlisting

instructional designers and IT specialists, and still others seeking membership from private institutions and the K-12 sector.

Some teams grew considerably while others remained small with only the original five representatives who attended the MHEC OER Summit in November 2018. In two cases the teams sought and received endorsement from a Board of Regents and the Department of Higher Education. Half the teams have listed on their second six-month plans the goal of increasing the representativeness of their membership.

This is an area in which MHEC has been able to offer much support to the State OER Action Teams. Because of the membership of the MHEC Commission and the time MHEC staff can devote to team recruitment activities, teams are able to identify an area of constituency and leave it to MHEC staff to find individuals who are interested in serving on the teams. When teams were asked which of MHEC's activities had been most supportive of their efforts in the last six months, more than half noted the help MHEC could provide in engaging new team members.

Repositories

Another common area of discussion and action involved repositories. In most of the states, the K-12 Department of Education had already established a repository, usually a hub through OER Commons. In several states, discussions and actions were set in motion to create parts of the hub website devoted to higher education, thus consolidating the cost and labor involved in establishing and maintaining a statewide OER repository.

In other states, teams were able to identify a number of parallel hubs and start to discuss how best to optimize and coordinate their use. The efficient and effective use of repositories is one of that major areas of interest and anticipated action during the next six months of State OER Action Team efforts. MHEC staff, since they communicate regularly with all 12 Action Teams, are able to provide to the teams examples of repository collaborations and protocols that are working in other MHEC states. When teams in one state wish to undertake a new repository project, MHEC staff are able to connect them to peers in other states who have already done so and who can share their experiences, successes, and challenges with them. Cross-state referrals of experiences and expertise was another area of MHEC OER activity the state teams identified as particularly helpful.

Data Gathering

Every State OER Action Team aimed to and continues to gather data in their states to establish where OER is being implemented and who is spearheading such efforts. In Iowa, a survey was written and deployed to which all public institutions and a majority of private institutions responded. In Kansas, students crafted and distributed a survey to other students at the larger public institutions. In Michigan, the state team joined with the existing state OER network to gather names and contact information for key OER contacts at nearly every postsecondary institution in the state.

Most of the state teams have listed a statewide OER survey as a major goal to pursue in one of their next two six-month plans. MHEC staff have been able to share with them the work done in Iowa and Kansas, as well as surveys used in other states outside MHEC. There is still considerable interest voices by several state teams in having MHEC develop a basic survey that can be adapted in each state but still provide consistent, regionwide data about OER implementation.

Presentations

State teams in all 12 states engaged in numerous presentations about OER and their work as a team. Presentations ranged from those at individual institutions to those at system level convenings of Chief Academic Officers to Boards of Regents. Several states also managed to arrange presentations to legislative committees, while others focused on presentations to groups of librarians, instructional designers, etc. Representatives from all 12 MHEC states and state action teams will also make presentations at the 2019 OpenEd Conference, the nation's largest and most comprehensive OER convening. Continuing to spread information about OER and the work of state teams by making presentations at critical meetings appeared on all 12 states' plans for the next six months.

MHEC OER State Action Team Efforts, July–December 2019

- The twelve MHEC OER State Action Teams have created plans for their work from July through December 2019. The most commonly mentioned goals were the following:

- Continue to build membership with and an emphasis upon making sure that a wide variety of OER stakeholders in each state are represented.

- Continue to gather information on OER work already underway in each state.

- Find the resources for and plan a statewide OER Summit in each state.

- Increase membership in and collaboration with national OER organizations like the Open Textbook Network, Openstax, CCCOER, and SPARC.

- Continue to collaborate on repository spaces that optimize the use of state resources and which have a consistent set of vetting processes, naming conventions, and metadata.

- Create, run, and collect data on faculty OER support and grant programs.

- Create a report (and possible proposals in some states) to deliver to state legislators for consideration during the spring 2020 legislative season.

MHEC OER Work, July-December 2019

MHEC staff will continue to support OER State Action Teams with scheduled phone calls, newsletters, webinars, and networking opportunities. In addition, MHEC staff will collaborate with other OER organizations to support training and presentation opportunities for State Action Team members and for MHEC staff. Finally, MHEC staff will be seeking philanthropic funds to support work within each of its 12 member states and to underwrite the cost of a second Midwestern Regional OER Summit.