



Reviewing a 5-Year Grant-Funded Campus OER Initiative: Reflections, Successes, & Challenges

**INNOVATIVE
PRACTICE ARTICLE**

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ABSTRACT

Open Educational Resources (OER) have continued to gain traction in higher education, assisting with ever-rising costs of publisher textbooks and supporting pedagogical innovation. Starting in 2017, NY state legislature has allocated funds annually to be split between its two public university systems to support and incentivize the adoption of OER. The author's institution, an included public college, has secured portions of this funding each year. This paper will focus on the initial five years of the state-funded OER initiative at the City University of New York (CUNY) College of Staten Island, with reflections on the successes of the program, the overall process of the annual grant cycle on campus, challenges that arose in the burgeoning OER program, and suggestions for future considerations. The main aim of this paper is to highlight the impact of state funding on the establishment of a library-facilitated OER initiative, to serve as an example for other institutions who are seeking to build an OER program.

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Open Educational Resources (OER) have continued to gain traction in higher education as tools to assist with the ever-rising costs of publisher textbooks and pedagogical innovation. OER are “learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, re-purpose, adaptation and redistribution by others” (UNESCO, n.d.). As the prices of proprietary textbooks have skyrocketed at more than three times the rate of inflation, these prohibitive costs have proved to be an almost insurmountable barrier for many higher-degree seeking students (SPARC, 2022).

In response to this, starting in 2017, New York state has annually allotted \$8 million to be split evenly between its two public university systems to help alleviate textbook costs (Straumsheim, 2017). Individual schools within the system may apply each year to secure portions of the funding. The City University of New York (CUNY) system serves a highly diverse population, of which almost 40% have a household income of \$20,000 or less (CUNY, 2023). Considering that students spend approximately \$1,200 annually on course materials in addition to tuition, it is apparent that the high cost of texts are a tremendous barrier to success (CUNY, 2023). As the Emerging Technologies Librarian and OER Coordinator (henceforth referred to as “OC” for ease) at The College of Staten Island (CSI), a senior college within this system, I (the current author) have managed the OER grant initiative for the four of the first five years of the award at my institution.

This paper will focus on the initial five years of the state-funded OER initiative at CSI, with reflections on the successes of the program, the overall process of the annual grant cycle on campus, challenges that arose in the burgeoning OER program, and suggestions for future considerations. My main aim is to highlight the impact of state funding on the establishment of a library-facilitated OER initiative, to serve as an example for other institutions who are seeking to build an OER program.

REVIEW OF LITERATURE AND RESEARCH FRAMEWORK

Much of the literature assessing OER programs focuses on student academic performance and/or retention, such as by Hilton, Fischer, Wiley, & Williams, 2016; Wiley, Williams, DeMarte, & Hilton, 2016; Grewe, 2017; Clinton, 2019; Hardin, Eschman, Spengler, Grizzell, Moody, Ross-Sheehy, & Fry, 2019; Engler & Shedlosky-Shoemaker, 2019; Cummings-Clay, 2020; Magro & Tabaei, 2020; Khoulé, Idrissi, & Sze, 2021; Bol, Esqueda, Ryan, & Kimmel, 2022; Hollister & Patton, 2022; Griffiths, Mislevy, & Wang, 2022; and Jaggars, Prieto, Rivera, & Folk, 2022. These authors conclude that students who used OER either demonstrated the same or better academic performance and had the same or better retention rates in comparison to their peers who used commercial texts. Student and faculty perceptions of OER programs also receive particular attention in the available body of literature by researchers such as Brandle, Katz, Hays, Beth, Cooney, DiSanto, Miles, & Morrison, 2019; and Nipa & Kermanshachi (2019), who contend that students tend to look favorably upon their OER courses for ease of access and affordability.

Schleicher, Barnes, and Joslin highlight the work of librarians who performed outreach to faculty and provided support as they introduced OER to their campuses (2020). Essmiller, Thompson, and Alvarado-Albertorio (2020) discuss their efforts to bring OER to Oklahoma State University via the library, a success despite some struggles with sustainability. Their study identifies both successes and challenges of their OER initiative, with clear strategies for future improvement (Essmiller et al., 2020).

These self-examinations of OER programs have become an important part of the conversation around understanding the impact of open education. Todorinova and Wilkinson (2020) review an incentive award program that was established at Rutgers University to support faculty who adopted material that was freely or openly available. They surveyed faculty on their experiences with the incentive program and found that most had positive feedback (Todorinova & Wilkinson, 2020). Another reflection on a new OER program describes the implementation of such an initiative at Lehman College (Katz, 2019). In Katz’s study, she provides a robust overview of how OER was introduced and incorporated into Lehman College’s curriculum (2019).

The current paper similarly reflects on an OER program and provides a longitudinal overview of the first five years of the grant-funded initiative. As stated by Bozkurt and Gil-Jaurena, “comprehending the past, learning from experiences, and devising strategic roadmaps based on that knowledge is crucial for understanding the future and positioning oneself effectively in the academic landscape,” (2023). My aim in sharing my college’s OER program builds upon and implements the assertions put forward by Müller (2021), Schuwer (2014), Mallinson & Emil Krull (2015), and Harold & Rolfe (2019): that there is tremendous value in sharing experiences with OER programming in order to help other educators, administrators, and librarians streamline their own open initiatives, equipped with robust understanding of the successes, challenges, and reflections of other open endeavors. As Baas, Schuwer, van den Berg, Huizinga, van der Rijst, & Admiraal determined from their study, educators find OER initiatives to be more successful if there is a strong community of peers to share their knowledge and experiences with each other, leading to more sustainable programs (2023). Such an exchange of ideas and practices mirrors the overall open education movement, which is predicated on sharing.

Of the retrospective articles on initial OER programs I have found, only first-year reflections seem common, such as by Zetta Cohen, Ludewig Omollo, & Malicke (2014), Cooney (2017), Katz (2019) and Brandle et al. (2019). To my knowledge, the current paper is the only 5-year reflection on the establishment and progress of state-funded OER project on an individual campus level. It is my intention that this detailed long-term view of an OER program will act as both a model of successful strategies and a helpful identification of challenges that arise when building a new OER initiative.

STRUCTURE OF THE OER GRANT AT THE COLLEGE OF STATEN ISLAND

The state-funded grant for CUNY promotes textbook cost savings for students by incentivizing faculty to assign free or open materials in lieu of commercial texts in their courses. This includes OER as well as resources that are available without additional costs to students, such as library resources. These courses are labelled as “Zero Textbook Cost” or ZTC. (The abbreviation “ZTC” will also be used in this paper to indicate no-cost materials that may or may not be openly licensed).

The award amounts are tiered by category. Faculty who apply for the funding to transition to OER materials are referred to ‘course managers,’ and receive \$2,000–\$2,500 per course to find and adopt ZTC materials to use in place of the previously assigned commercial texts. This may entail authoring a new text, tailoring a custom text by remixing various openly licensed resources together, or finding and adopting a full open textbook without altering the content. Course managers also ensure that each section of the course is labelled as “ZTC” within the university’s online class registration system. They are expected to provide an end-of-year report to the OC to be aggregated and submitted to the central university library, which includes the number of sections of newly designated ZTC courses, the number of students enrolled, and the cost of the previously assigned textbook. Any original materials that may have been created as part of the grant are assigned an open license and uploaded to the institution’s open access repository. Course managers are also expected to lead any additional instructors who agree to teach sections of the same course by ensuring that these sections meet the same requirements. These additional course instructors receive \$500–\$750 each as an incentive award.

ROLE OF THE LIBRARY

The Office of Academic Affairs oversees the grant, and the OC (a faculty librarian) acts as the main facilitator of the overall initiative. The OC provides research and library-related support to faculty and acts as liaison between the central university library and the college-level grant cohort. While the course managers are responsible for developing course content and selecting OER to adopt, the OC assists with finding OER, answering copyright and licensing questions, and identifying open platforms to use for hosting or publishing OER.

The OC has typically arranged at least one OER related professional development event for faculty per semester, ranging from instruction on the differences between Creative Commons open licenses to comparing platforms for hosting custom tailored texts. During the first year of the grant cycle, the previous OER Coordinator worked with a grant-supported adjunct OER

librarian to create a Library Guide (LibGuide) on open resources. The guide provides an overview of OER, including definitions, its significance, how to locate OER materials, various publishing platforms, and potential funding opportunities. This guide has been curated and updated regularly by the current OC and adjunct OER Librarians to serve as a dynamic resource for faculty.

The OC, with support from the Chief Librarian/Dean, also tailors the greater university's call for proposals each year to apply to individual faculty, distributes it, and then aggregates collected proposals into a single document that is submitted to the central university library.

FACULTY PARTICIPATION

Over the first 5 years of this initiative, faculty from a variety of disciplines have embraced OER. They have expressed their excitement to the OC at the prospect of helping students with textbook costs, as they have noticed that many students will opt to not purchase texts as the costs can be prohibitive (Brandle et al., 2019). Faculty seem aware of the range of non-traditional students at this institution, many of which are financially insecure, work full time to support their education, or have dependents they provide for. Their motivation to help students to excel in their education despite rising textbook costs has been palpable in their informal conversations with me as we have discussed the purpose of the state funding.

Faculty who apply for the grant generally have some understanding of OER, and are often familiar with resources such as OpenStax, a platform for peer-reviewed OER. For the first year of the grant cycle, funding covered the costs for the platform Lumen Learning, a provider of online courseware built around published OER texts. Later into the grant cycle, faculty were encouraged to focus instead on internally hosted platforms, such as our Academic Commons, a Wordpress-based platform that can be used to create free and open sites, and Manifold, a platform for publishing texts that can be enhanced and annotated by faculty and their students. The OC worked with faculty on a case-by-case basis to determine which digital platforms best suited their needs for remixing and hosting OER. To help faculty become acquainted with a variety of platforms, OC collaborated with the central university library to organize multiple workshops and informational sessions via Zoom and on campus. Regular support through individual meetings and email correspondence is also typical.

PROFESSIONAL DEVELOPMENT FOR FACULTY

AN OER SYMPOSIUM

To introduce faculty unfamiliar with OER to open education, a small ad hoc task force was formed comprising of the Chief Librarian/Dean, OER Coordinator, and Coordinator of Library Instruction to plan a symposium in November of 2019. This symposium included informational sessions on OER and panels of both students and faculty highlighting their experiences using open materials. To encourage widespread attendance, grant funds were utilized to provide stipends of \$50 each to adjunct faculty who attended the full day. The intention was to motivate more adjunct faculty to learn about the potential impact OER could have on their students, since many classes at our school are adjunct-taught. The event was also designed to encourage participants to later apply for funding to transition their classes to OER. The entire symposium was recorded (with permission), and is embedded on the OER LibGuide. The videos have been viewed around 140 times, data which was tracked via the built-in tool on the library website.

OER CRASH COURSE

YEAR	NUMBER OF COURSES CONVERTED	NUMBER OF SECTIONS CONVERTED
2017-2018	11	72
2018-2019	10	140
2019-2020	16	81
2020-2021	7	27
2021-2022	6	11
Total	50	331

Table 1 Courses and Class Sections Converted to OER/ZTC at CSI.

Starting in the 4th year of the OER initiative, there was a decrease in course and section conversions to ZTC (Table 1). To combat this challenge and to encourage faculty to learn about OER in a flexible environment (as this was during the shift to distance learning at the start of the COVID-19 pandemic), the author created an asynchronous online OER introductory course for faculty.

The purpose of this course was to introduce faculty to OER during a time when virtually the entire college was remote. To support faculty learning in a somewhat condensed format, the course was designed with four separate modules, with one module to be completed per week for a total of 4 weeks. Each module included text-based information, videos, images, and an interactive component, and required anywhere from 3–5 hours to complete. This timing estimate was determined based on the average completion time of three separate librarians who pre-tested the course. The course was created using the Springshare tools “LibGuides” and “LibWizard.” This allowed for the course to be hosted on the library’s own website via a single platform. LibWizard is a tool used to create quizzes, forms, assessments, and tutorials. LibWizard was used to create simple forms for submitting deliverables, which were embedded into the LibGuide-hosted course pages. The modules required faculty to identify courses they teach that would benefit from OER, to locate useful OER within their disciplines, to remix OER for use in those selected courses, and to create their own OER to upload to the college’s open access repository. The course served the dual purpose of familiarizing faculty with OER and helping to bolster the college’s OER publications within the repository.

Faculty who participated in the OER course each received a \$1,000 stipend upon successful completion. Since the course was designed to be completely asynchronous, the entire suite of content was made available from the start, with the four-week duration as a suggested timeframe. Faculty could choose to complete it in less time than the allotted four weeks, given all four required assignments were submitted before the end date. OC acted as the sole facilitator of the course and assisted with questions via email or Zoom.

For the first run of the course, 77 faculty members applied and 49 were accepted. The application was created via LibWizard as a text-based form. Acceptances were based on a 250-500 word statement on why applicants were interested in taking the course and how they hoped to apply it to their pedagogy. Priority was given to faculty who had little to no experience with open education. Faculty from every school and division within the college were represented in both course runs. In the second run, 32 faculty members out of 40 applicants were accepted into the course, including faculty from four new departments and programs (Table 2).

FACULTY	2021	2022	TOTAL
Departments	17	14 (4 new)	21
Division of Humanities & Social Sciences	29	14	43
Division of Science & Technology	6	7	13
School of Business	3	2	5
School of Education	4	2	6
School of Health Sciences	7	7	14
Adjunct	25	26	51
Full Time	24	6	30
Total Faculty	49	32	81

Table 2 Faculty Participants in OER Crash Course by Discipline and Status at CSI.

The course participants have uploaded 81 original OER materials to the institution’s open access repository. This has greatly expanded the college’s OER collection and seems to have encouraged course participants to also submit published papers to the Publications and Research category, as they have uploaded over 40 new research works after the course.

PROJECT SUCCESSES, CHALLENGES, AND FUTURE CONSIDERATIONS

The clearest and most measurable success of this overall OER initiative is the amount students have saved in textbook costs. The table below shows the cumulative student savings during

Table 3 Five-Year Overview of Student ZTC/OER Cost Savings at CSI.

the first five years of this program, which was over \$1.5 million dollars (Table 3). This number only accounts for the initial run of a course section as ZTC/OER, and does not include the compounded savings of each future iteration of the section. This is difficult to calculate, as section numbers change per semester and courses are not always offered in chronological semesters. Therefore, the savings are likely far greater.

YEAR	NUMBER OF COURSES CONVERTED TO ZTC/OER	NUMBER OF COURSE SECTIONS CONVERTED TO ZTC/OER	TOTAL NUMBER OF STUDENTS ENROLLED IN ZTC/OER COURSES	TOTAL STUDENT TEXTBOOK COST SAVINGS
2017–2018	11	72	1742	\$346,548
2018–2019	10	140	6275	\$587,885
2019–2020	16	81	2713	\$498,682
2020–2021	7	27	915	\$107,409
2021–2022	6	11	144	\$10,922
5-Year Total	50	331	11,789	\$1,551,446

As is shown above, students saved over \$1.5 million in textbook costs during the first five years of the state-funded OER grant initiative at CSI (Table 3). The total amount of funding provided by the state was \$567,556. To calculate the return on investment (ROI), I employed the ROI formula provided by The Dictionary of Publishing (2019): the net investment gain (in this case, \$1.5 million in student savings), divided by the initial investment (\$567,556 in grant funds) times 100 to determine a percentage. The ROI for this grant initiative is therefore 264%. Of course, this is not an economic paper, and the economics-focused language is employed here simply to demonstrate the proportionate impact of the funding on student savings. The student textbook cost savings were calculated by multiplying the number of students enrolled in each course section by the price of the textbook that was previously assigned. These metrics were provided in the annual reports submitted by the course managers to the OC, who then calculated the savings. These are estimates, and indicate a general amount that was saved by students. These savings, along with increased faculty creation and publication of OER to the institution’s open access repository, are the initiative’s greatest successes so far, as it has helped our students with the barrier of textbook costs. The greatest challenge is to continue to sustain the initial momentum of the program’s first five years.

Since 2020, the majority of the grant funding has pivoted to support faculty OER programming, as the amount of courses and sections that faculty apply to convert has continued to decrease. In the future, it is my goal to add to faculty development as part of this initiative by creating additional asynchronous courses, including one on open access publishing. I also seek to encourage further large-scale course conversions to continue to save our students funds, the main aim of our OER program. Although OER has a far greater impact than textbook savings, free course materials are invaluable to our student population and should continue to be promoted. Supporting original OER text creation is also paramount, as this can assist faculty who are hesitant to convert to ZTC due to a lack of diverse material in their disciplines by increasing the range of available OER.

Another challenge is faculty resistance to new technologies. Many faculty have candidly expressed hesitance to learn new technologies to the OC. To address this, the author plans to collaborate with the college’s Office of Institutional Technology and Faculty Professional Development Center to develop video tutorials and live workshops on how to use various relevant technologies. Funding incentives for participants of these workshops will be proposed in upcoming grant cycles.

LIMITATIONS AND SUGGESTIONS FOR FUTURE RESEARCH

The data and reflective analysis that has been presented here have limitations. Firstly, the information is narrow in scope as it focuses on the amount of textbook cost savings in a single institution across many variables. It was not performed as a comprehensive research study,

as the only quantitative data obtained was reported by individual faculty grant recipients, who were required to track student cost savings, but any further assessments were optional. Therefore, this is more of a snapshot into the quantifiable impact of the grant funding on student cost savings, and a more reflective view on a nascent OER program.

Secondly, due to the method of data collection, the numbers are an estimate of cost savings based on the full price of the textbook, which is not the only way students may have secured course materials previously. The main goal of this paper is to provide a reflective overview of the establishment of a new OER program over the course of 5 years. It would be useful in the future to survey faculty, using Harold and Rolfe (2019) as a potential model, to gather more individual faculty perspectives in addition to the library perspective. Finally, to further expand the efficacy and impact of this OER initiative, I intend to also submit a proposal for additional funding to further support faculty as they perform assessments that demonstrate the concrete pedagogical effect of ZTC/OER on their classes. This may include analyses of class enrollment metrics, student performance, and student engagement. This data will be helpful in determining how the library and the grant can be leveraged to further support our students and faculty in this continuing long-term OER initiative.

CONCLUSION

The first five years of the state-funded OER program at the College of Staten Island been an overall success. Funding from the state allowed students to save over \$1.5 million in course materials. Not only have students saved this money, eliminating a large barrier to success in their studies, but the grant has also successfully incentivized faculty to author original OER, publishing over 80 open educational works to the institutional open access repository. OER has become synonymous with our campus library services, and support for both faculty and students continues to expand. As long as the state funding continues to be available for this college, the author and other stakeholders on campus will keep striving to best utilize it in support of OER adoption, creation, research, and innovation for our students and faculty. This examination of the practice of building an innovative grant-supported OER program can serve as an example, perhaps even as a benchmark, of the successes and challenges of such an endeavor at a large public college. Such reflection can benefit the open community by providing a library perspective on how to build a sustainable initiative, and how crucial significant funding is to such a large-scale open practice on campus.

COMPETING INTERESTS

The author has no competing interests to declare.

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