Open Educational Resources (OER) in Texas Higher Education, 2019

DIGITEX
DIGITAL HIGHER EDUCATION CONSORTIUM OF TEXAS

60×30TX
Texas Higher Education
Coordinating Board

Contents

Executive Summary

This report presents the results of an independent survey commissioned by the Digital Higher Education Consortium of Texas (DigiTex, formerly the Virtual College of Texas), in collaboration with the Texas Higher Education Coordinating Board (THECB), to examine the landscape of OER programs, policies, and practices at higher education institutions in Texas.

The survey was administered in May 2019 to all 158 two- and four-year public and private institutions across the state. Responses from 100 institutions paint a picture of growing commitment to OER, with 38% of institutions having formal programs and initiatives in place to support OER, and with 51% either in the process of or interested in implementing OER programs or policies in the future. The survey findings further reveal insights into specific priorities, practices, and perceptions surrounding OER across the Texas higher education landscape, including:

- Affordability and access are key drivers of OER, though teaching and learning benefits also play a role;

- The development of faculty OER training and incentive programs are key priorities for institutions;

- OER-based courses are prevalent across Texas and likely to scale, and the development of full, OER-based programs are also underway, primarily at the state's two-year institutions;

- OER initiatives are funded primarily through internal budgets;

- Institutions are centralizing their OER work through dedicated roles, offices, and committees;

- OER success is a collaborative effort, with libraries, students, and cross-institutional partnerships playing important roles;

- OER discourse is limited and non-standardized within and across institutions, and the majority of institutions do not have a written definition of OER;

- Data collection on the pedagogical and financial impacts of OER is nascent, yet promising; and

- Institutions view lack of faculty awareness and conflicts with existing priorities as principal barriers to OER adoption.

The report concludes that those leading the way in OER across the state are appointing dedicated committees to shepherd the OER work at their institutions, allocating resources to OER training for faculty and for the development of OER, and collecting data on the extent and impact of OER use. A small number of bellwether institutions also are sharing their OER externally with other institutions in national OER repositories, articulating concrete open licensing policies in their intellectual property guidelines, and collecting innovative data on OER use and impact—such as data on instructors' level of engagement in OER compared to traditional course materials. Enabling further expansion of these efforts necessitates institution, system, and state level support as colleges and universities work to more effectively utilize their resources to increase instructor and student use of OER.

Definitions

Inclusive Access is a publisher-driven model wherein institutions subscribe to online course materials that are made available to students on the first day of class, and the cost of the materials are either bundled into their tuition or paid for separately by the student for the course. Inclusive Access textbooks and course materials are not openly licensed and are not free for learners.

Open Educational Resources (OER) are defined in Texas Education Code, Section 51.451, as teaching, learning, or research resources that are in the public domain or that have been released under an intellectual property license that permits their free use, adaptation, and redistribution by any person. The term may include full course curricula, course materials, modules, textbooks, media, assessments, software, and any other tools, materials, or techniques, whether digital or otherwise, used to support access to knowledge.

OER Course Markings were signed into law through Senate Bill 810 (SB810, now TEC 51.452), requiring that Texas colleges and universities share searchable information with students about courses that use OER. Examples of course markers include incorporating OER icons into print schedules, developing stand-alone lists of OER courses, and integrating OER labels into web pages.

OER Grant Program is a program authorized by Senate Bill 810 and administered by the Texas Higher Education Coordinating Board. The program awards up to 20 grants annually to faculty who adopt, modify, redesign, or develop course materials that use only open educational resources.

Open Pedagogical Practices are a set of collaborative teaching and learning practices that help educators to advance a culture of sharing and active learning through OER. Examples of open pedagogical practices include faculty collaboration on curriculum development, openness to peer review and critique of each other's resources, and partnership on instruction and learning with students.[1]

OER Repository is an online platform that hosts or aggregates OER and that is used to improve the search and discovery of content. In September 2019, Texas House Bill 3652 authorized the creation of a state repository for OER by the Texas Higher Education Coordinating Board.

Open License is a copyright license that grants the public the ability to use a creative work according to a set of permissions and restrictions. The best-known open licenses are the Creative Commons Licenses. All six Creative Commons Licenses require that any uses include attribution to the original author; some permit only noncommercial uses; some do not allow the creation of derivative works.[2]

60x30TX is the Texas higher education strategic plan, which strives for 60% of the 25- to 34-year old Texas population to hold a certificate or degree by 2030.

Z-Degree Program, or zero textbook cost degree program, is a set of courses in a specific program area that allows a student to earn a credential, such as an associates degree or certificate program, with zero textbook costs, by way of using open educational resources and/or materials provided to students free of charge, e.g., via the library.

Introduction

Across the U.S., the sharp increase in the price of college textbooks (+204%) combined with an increase in college tuition (+191%) over the last two decades has been a significant barrier to postsecondary access and success.[3,4] OER has emerged as an important solution in helping to address this barrier. Beyond textbook cost savings for students,[5] access to OER-based course materials on the first day of class has been empirically linked to higher student enrollment, lower student attrition, and improvements in end of course grades.[6,7] Research also has shown that faculty's use of OER results in enhanced instructional practice and more personalized responses to student needs compared to traditional course materials.[8,9] Recognizing these benefits, 26 states across the U.S. have enacted or are in the process of enacting higher education policies supporting the use of OER,[10] and a growing number of institutions themselves are working to convert some or all of their courses to OER to meet the need for more affordable and engaging materials. Further, an increasing number of faculty across U.S. colleges and universities are selecting OER as part of their required course materials.[11]

Following this national trend, the adoption and use of OER in Texas has increased over the past decade. State policymakers and educators alike are focusing on the potential for OER to support postsecondary access and affordability. A report on the feasibility of creating an OER repository in Texas, submitted to the Texas Higher Education Coordinating Board (THECB) in July 2018, recommended promotion of OER statewide to reduce costs for students and improve learning outcomes.[12] Furthermore, during the 86th Texas Legislature, Regular Session, the THECB was directed to contract with an existing OER repository to develop and maintain a customized state web portal. Legislative funds also support a statewide faculty OER grant program. Such activities recognize that OER is a promising strategy for meeting the goals of 60x30TX. While many Texas institutions have long been engaging in innovative OER practices and projects—in some cases extensively (e.g., through participation in the Achieving the Dream Network)—the state has lacked a broad, holistic understanding of OER adoption and use across Texas.

This report presents the results of an independent survey commissioned by the Digital Higher Education Consortium of Texas (DigiTex), in collaboration with the THECB, to examine the landscape of OER programs, policies, and practices at higher education institutions in Texas. Administered in May 2019 to all 158 two- and four-year non-profit institutions across the state, the survey sought to answer the following questions:

- How and to what extent are institutions across Texas using OER;

- What challenges and incentives are affecting OER adoption for institutions;

- What supports enable increased adoption and use of OER; and

- Where is the most promise, in terms of the use and impact of OER within and across institutions.
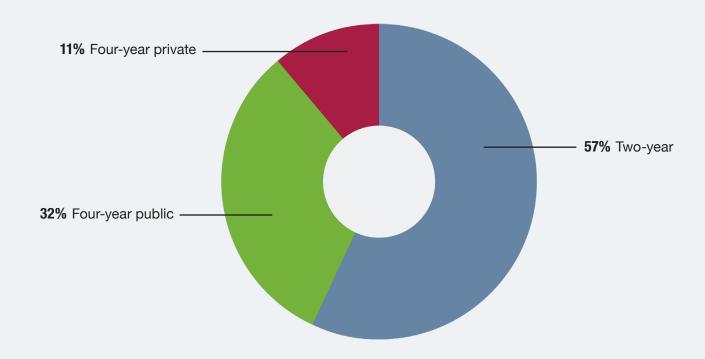
The report summarizes the survey findings, and concludes with a set of high level recommendations for how colleges and universities may be supported to more effectively utilize their resources to increase instructor and student use of and access to OER—toward enhanced teaching and learning for all.

Survey Approach

The Texas OER Landscape Survey was administered in May 2019 to 158 two- and four-year non-profit, public and private institutions across the state.[13] A total of 100 institutions responded to a sufficient number of questions to be included in the analysis. The 100 respondents represented the full range of Texas colleges and universities, although two-year institutions made up the largest respondent group, as depicted in Figure 1 below.

When looking at the ratio of participants invited to participants responding by institution type, two-year institutions were well-represented (51% in the population versus 57% in the survey sample); four-year public institutions were moderately over-represented (23% in the population versus 32% in the survey sample); and four-year private institutions were under-represented (25% in the population versus 11% in the survey sample).

FIGURE 1: Respondents by institution type (N=100)

- 11% Four-year private
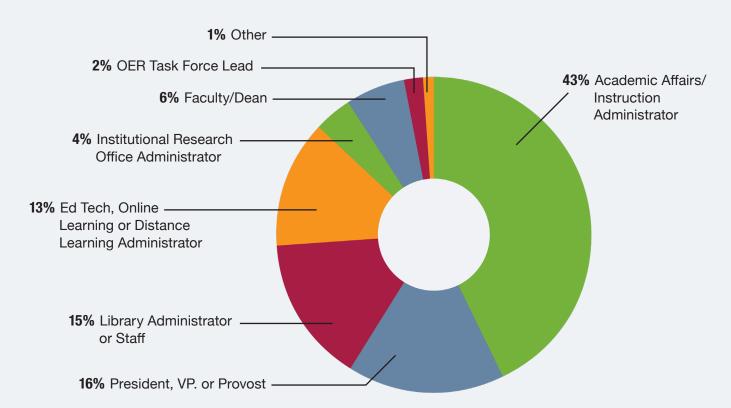- 57% Two-year
- 32% Four-year public

With the goal of targeting the most OER-knowledgeable individuals on each campus, the web-based survey was sent via email to Chief Academic Officers, who were asked to either complete the survey, or to forward the survey to the most appropriate individual for answering questions about OER. Respondents also were encouraged to consult with other subject matter experts on their campus if they did not know how to respond to a given survey item, or if they needed to collect additional information to answer an item. Figure 2, below, provides a breakdown of survey respondents by self-reported role.

Through a mix of open- and closed-ended questions, the survey instrument sought to capture several dimensions of OER adoption and use across institutions, including OER policies and programs in place, OER leadership and advocacy, and OER impact. In an attempt to norm the responses around a centralized conceptualization of OER, the Texas Education Code definition of OER was listed in the second question of the survey and was also repeated on each page of the survey instrument. The complete survey instrument is provided at the end of this report.

Descriptive analyses of the survey data were conducted, as well as comparative analysis for different subgroups including: a) two-year vs. four-year institutions, b) four-year private vs. four-year public institutions; c) institutions with less than 10,000 undergraduate students vs. institutions with more than 10,000 under-graduate students; d) institutions with more than 35% Pell Grant recipients vs. institutions with less than 35% Pell Grant recipients; and e) institutions that have both OER policies and programs in place vs. institutions that are not interested in developing OER policies or programs, now or in the future.

FIGURE 2: Respondents by role (N=96)

1% Other
2% OER Task Force Lead
6% Faculty/Dean
4% Institutional Research Office Administrator
13% Ed Tech, Online Learning or Distance Learning Administrator
15% Library Administrator or Staff
16% President, VP. or Provost
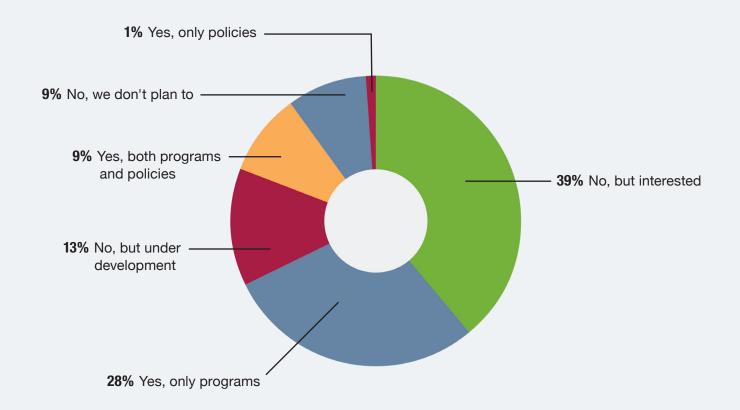**43%** Academic Affairs/ Instruction Administrator

Findings

There is a growing commitment to OER across Texas

A combined 51% of institutions either have formal OER policies and/or programs in place, or are in the process of developing them. Another 39% are interested in implementing OER policies or programs in the future (Figure 3).

Likely due to the availability of resources needed to implement OER (funding, human resources), large institutions are more likely to have OER policies or programs in place than small institutions (p <. 015, Fisher's Exact Test and $X^2(1, N = 99) = 14.59$, p <. 000, respectively). However, of the institutions that do not currently have OER policies or programs in place, small institutions are more likely to be interested in developing programs and/or policies in the future than large institutions ($X^2(1, N = 99) = 5.37$, p <. 020).

> " We are at a beginning stage in adopting OER, but we are interested in increasing the use of OER to improve the efficiency and effectiveness of course offerings."
>
> SURVEY RESPONDENT

FIGURE 3: Institutions with OER programs or policies in place (N=99)

- **1%** Yes, only policies
- **9%** No, we don't plan to
- **9%** Yes, both programs and policies
- **13%** No, but under development
- **28%** Yes, only programs
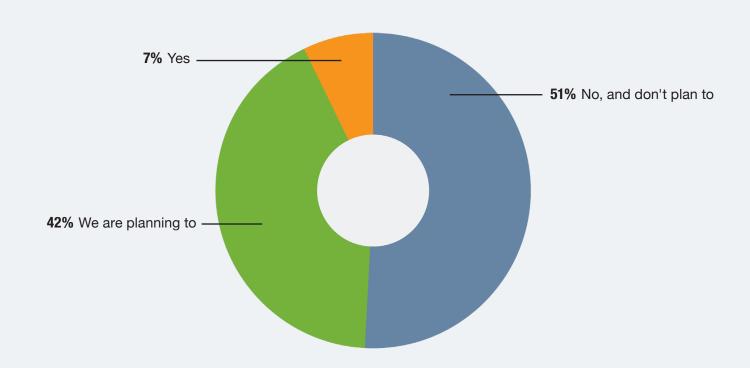- **39%** No, but interested

Institutions also were asked specifically about whether they have open licensing policies in place to support OER on their campuses. Forty-two percent of institutions do not currently have open licensing policies, but are planning to adopt a policy in the future (Figure 4).

Of the seven institutions (7%) reporting that they do have an open licensing policy in place, only two utilize specific open licensing language in their copyright and intellectual property guidelines. At one of these institutions, the open licensing policy is centered within a single department, and stipulates that "materials created with departmental assistance must carry a Creative Commons License." The other institution stipulates that "copyrightable works developed by faculty or staff may be licensed under a Creative Commons License."

> " [Our policy is as follows:] Copyrightable works may be licensed under a Creative Commons License, which allows copyright holders to grant some or all of their rights in their work to the public, while still retaining other rights."
>
> SURVEY RESPONDENT

FIGURE 4: Institutions that have an open licensing policy (N=100)
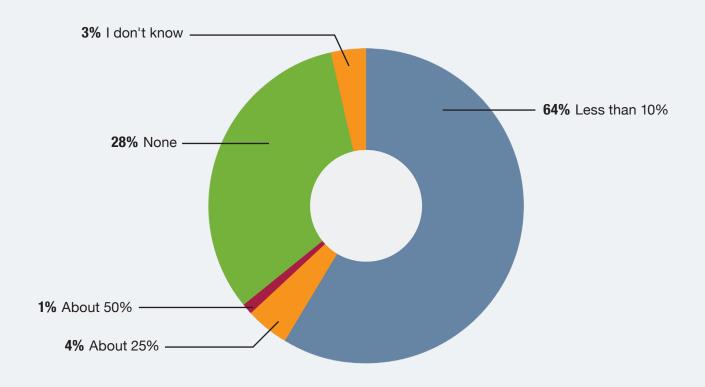

7% Yes
51% No, and don't plan to
42% We are planning to

OER-based courses are prevalent and likely to scale

OER-based courses—where all of the required materials for the courses are openly licensed—are offered at the majority of Texas colleges and universities (69%), although they typically make up less than 10% of their overall undergraduate course offerings (Figure 5).

Furthermore, OER-based courses are likely to scale across Texas, as 77% of institutions are working to develop resource collections or courses with OER. Twenty percent of responding institutions (primarily two-year) have or are developing full, zero cost credentials that use OER—specifically naming sociology, psychology, organizational leadership, and general studies as their focus areas for these programs.

" We are currently reviewing our textbook/bookstore contract and have a team of faculty, students, and administrators exploring OER as well as alternative options. We are considering funding pilot programs for faculty to develop OER courses for this coming fall."

SURVEY RESPONDENT

FIGURE 5: Percentage of undergraduate courses that are fully OER-based (N=96)

- **3%** I don't know
- **28%** None
- **1%** About 50%
- **4%** About 25%
- **64%** Less than 10%

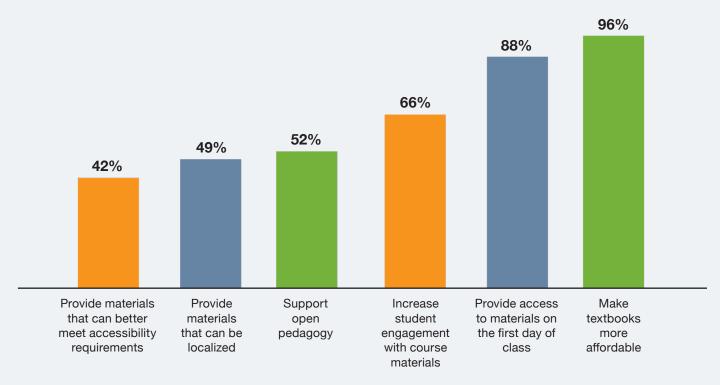## Affordability and access are key drivers of OER, though teaching and learning benefits also play a role

Textbook affordability and student access to materials are driving OER adoption across Texas, with 96% and 88% of institutions reporting on these goals for OER use, respectively (Figure 6). Many institutions also are turning to OER to enhance teaching and learning, and specifically to increase student engagement with course materials, to support open pedagogical practices among faculty, and to provide materials that can be localized to meet learner needs.

Other goals not depicted in Figure 6 include decreasing reliance on commercial publishers (54%), reducing the cost of course development for the institution (30%), and providing resources that can be integrated with learner analytics (18%).

Looking at responses by institution type, two-year institutions are more likely than their four-year counterparts to focus on increasing student engagement with course materials as a goal for OER use (X^2(1, N = 93) = 5.15, p <. 023).

" [In my field], there is tremendous dissatisfaction with commercially-produced textbooks because of their high costs. In addition, most textbooks are pedagogically conservative and do not incorporate the latest in [related] research. Finally, educators emphasize the use of authentic texts and rich multimedia that is widely available on the Internet. As such, [our] textbooks appear increasingly anachronistic."

SURVEY RESPONDENT

FIGURE 6: Goals for OER use (N=93)

Provide materials that can better meet accessibility requirements	Provide materials that can be localized	Support open pedagogy	Increase student engagement with course materials	Provide access to materials on the first day of class	Make textbooks more affordable
42%	49%	52%	66%	88%	96%

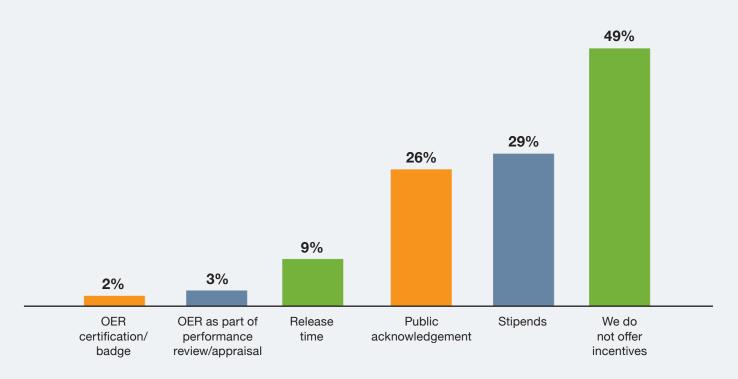## Faculty training and incentives are key priorities

When asked about the focus of their current or planned OER work, the largest percentage of institutions, 93%, reported that they are working to provide faculty support for the use of OER in their courses, and 73% to provide internal OER trainings or professional learning resources for faculty and staff.

On a separate question, 51% of institutions reported that they offer incentives to encourage OER use among faculty, including stipends for initiating OER projects, release time to work with OER, and public recognition for faculty-led OER work (Figure 7).

The analysis further revealed that four-year public institutions and large institutions are more likely to offer incentives to encourage faculty use of OER than their four-year private (p<.004, Fisher's Exact Test) or small institution (X^2(1, N = 97) = 11.369, p <. 001) counterparts.

FIGURE 7: Incentives offered to encourage faculty use of OER (N=97)

OER initiatives are funded primarily through internal budgets
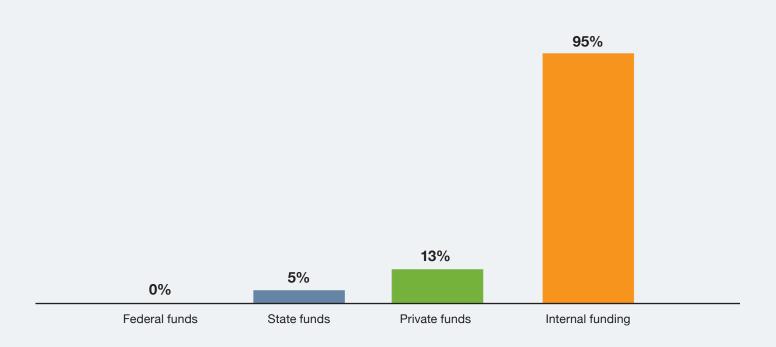
Forty-two percent (or 42) of institutions across Texas have allocated funding to OER in the past three years.

When asked to specify the source of their funding, the 40 responding institutions indicated that their OER initiatives are funded primarily through internal budgets, and specifically through the library, the academic affairs office, departmental budgets, or funds from the president's or provost's office (Figure 8).

A few institutions also fund their OER work through external sources, including private donors and foundations, or funds from initiatives like Achieving the Dream or the Texas Affordable Baccalaureate Program.

> " The Library has dedicated money toward OER resources and advocacy efforts, as well as staff time redirected toward this initiative. The Library, Center for Faculty Excellence, and Office of Distance Education and Learning Technologies have all contributed money from their budgets to support the Community of Practice and advocacy efforts."
>
> —SURVEY RESPONDENT

FIGURE 8: Sources of funding for OER work (N=40)

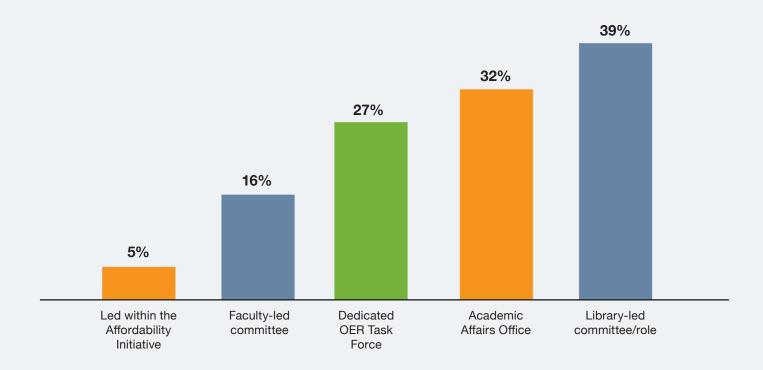| Federal funds	State funds	Private funds	Internal funding
0%	5%	13%	95%

Institutions are centralizing their OER work

Forty-seven percent (or 46) of institutions have a centralized office, committee, or role that oversees or leads their OER work. Based on the responses of 44 of these institutions, this leadership typically occurs through a library-led committee, the academic affairs office, or a dedicated OER task force (Figure 9). Although not depicted in Figure 9, seven institutions lead their OER work through a mix of other, less common channels, including textbook committees, college success working groups, student supported working groups, or bookstore supported working groups.

Not surprisingly, four-year institutions and large institutions are more likely to have a centralized office, committee, or role that oversees OER than their two-year institution (p<.000, Fisher's Exact Test) or small institution (p<.000, Fisher's Exact Test) counterparts. Additionally, institutions serving more than 35% Pell Grant recipients are also more likely to have a centralized office, committee or role that oversees OER than institutions serving less than 35% Pell Grant recipients (p.<.046, Fisher's Exact Test).

" The campus has an OER Task Force, comprised of representatives form the academic colleges as well as campus partners. It is led through the library. This committee doesn't have true 'oversight'; however, it is leading efforts through advocacy and awareness."

SURVEY RESPONDENT

FIGURE 9: Roles, offices, or committees that oversee the OER work (N=44)

Led within the Affordability Initiative: 5%
Faculty-led committee: 16%
Dedicated OER Task Force: 27%
Academic Affairs Office: 32%
Library-led committee/role: 39%

Libraries play an important role in enabling OER

Beyond their funding and leadership support for OER on their campuses (see above), libraries play additional roles in enabling OER. At 79% of institutions, libraries provide OER faculty training, advocate for OER, and/or curate and share OER as part of their library services (Figure 10). Only 21% of institutions reported that libraries and library staff do not currently play a role supporting OER.
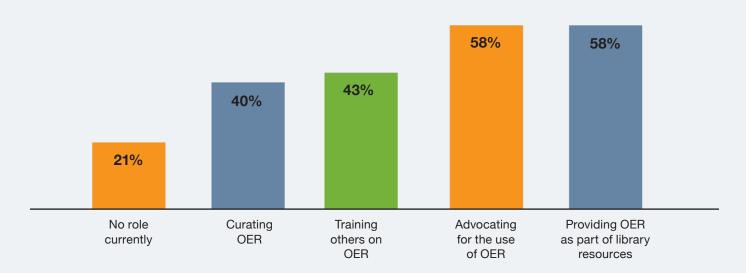
Students also play a role in enabling OER

Institutions were also asked if there is an organized student group that advocates for or supports OER on their campus. Twenty percent of institutions reported that such organized student groups do exist on their campuses, and that they typically operate from within the institutions' Student Government Associations, as well as through Student Senate Academic Affairs Committees, Student Advisory Boards, and Senate of College Councils. One institution named a national advocacy group, the Student PIRGs, as the center of their students' OER advocacy.

Looking across institution types, four-year institutions are more likely than two-year institutions to have a student group that advocates for OER on their campuses (X^2(1, N = 99) = 23.23, p <. 000).

> " There is not a student organization dedicated strictly to OER. However, our Student Government Association has championed for OER, holding town halls, providing a template letter for students to share with faculty, and assisting with the Task Force efforts through representation on the committee."
>
> SURVEY RESPONDENT

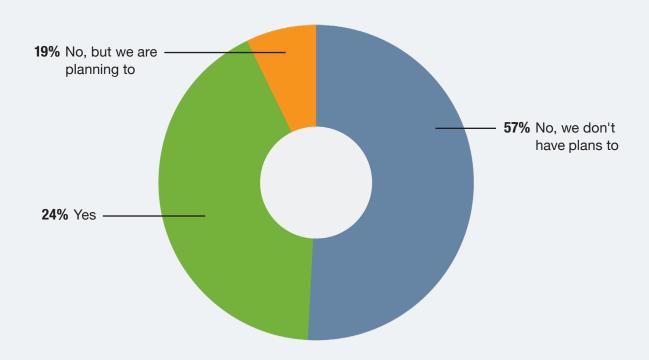FIGURE 10: Roles that libraries/library staff play in supporting OER institutions (N=98)

Cross-institutional partnerships are emergent and growing

Nearly half of institutions (43%) are currently working or planning to work with other institutional partners on OER (Figure 11). The most prevalent examples of OER collaboration provided by survey respondents include cross-library partnerships to support OER curation and use, cross-institutional consortia such as the Houston Area OER consortia, and collaboration with other institutions in the same university or district system. Other examples include discipline-specific partnerships through, e.g., National Foreign Language Resource Centers, and participation in national open textbook initiatives, such as the Open Textbook Network. Alongside these partnership examples, five institutions also reported that they are working to share their OER in public OER repositories, so that external communities have access to the OER development work they have done.

" We work with the [...] affordable learning task force as well with other [...] system institutions that have created OER textbooks. We are seeking to share these resources across the system."

SURVEY RESPONDENT

FIGURE 11: Institutions that collaborate with other educational institutions on OER (N=98)

19% No, but we are planning to

57% No, we don't have plans to

24% Yes
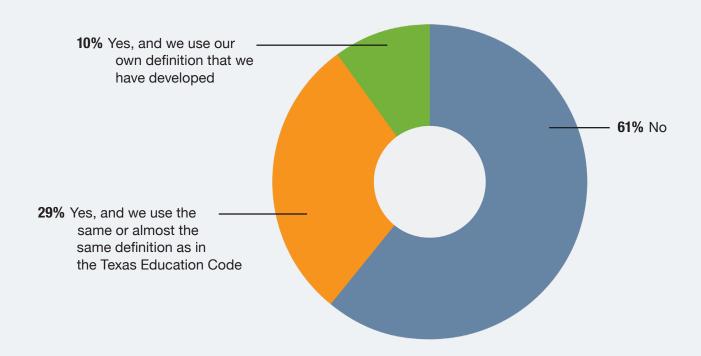
OER discourse is limited and non-standardized

While OER programs and initiatives are prevalent across the institutions surveyed, formalized language to enable OER is limited and not standardized.

Sixty-one percent of institutions do not have a written definition of OER (Figure 12). Another 29% use the same definition for OER as listed in the Texas Education Code, which delineates OER as "teaching, learning, or research resources that are in the public domain or that have been released under an intellectual property license that permits their free use, adaptation, and redistribution by any person." The remaining 10% have developed their own definition of OER, and three of these institutions mention "free of charge" as part of their definition, yet do not define or specify open licensing, or the use freedoms that OER allow in terms of repurposing and adaptations.

" *[Our] OER-related course materials vary widely across disciplines and many resources are freely available, but do not necessarily meet the 'public domain' definition. Formal identification of OER-related course materials is in progress. Implementation of a new 'Quality Enhancement Plan' will likely guide exact identification and reporting processed within the next few years.*"

SURVEY RESPONDENT

FIGURE 12: Institutions that have a written definition of OER (N=100)

10% Yes, and we use our own definition that we have developed

29% Yes, and we use the same or almost the same definition as in the Texas Education Code
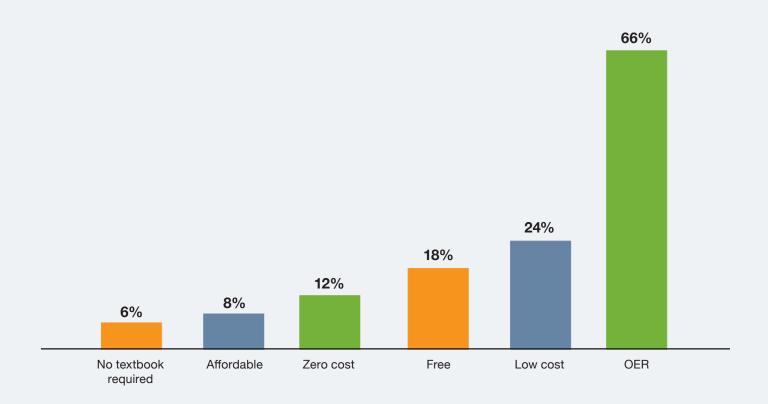
61% No

Institutions were also asked if they had implemented the course marker requirement of SB 810, which stipulates that institutions share searchable information with students about courses that use OER. In total, 61% (or 59) of institutions have course markers in place. Fifty institutions reported on the specific terms used in their course listings, and as depicted in Figure 13, the majority of these institutions reportedly use the term "OER" to mark their courses.

A separate analysis of the overlap between terms used by institutions revealed that 21 institutions exclusively use the term OER to mark OER-based courses, and 12 institutions use terms like free, no cost, low cost, and affordable alongside OER. In addition, 17 institutions do not use the term OER as a course marker, but use other terms instead.

" [Our] bookstore labels [a] course as OER if they recognize it as such (e.g., a title from OpenStax). [We have a] planned upgrade to [our] platform for tracking faculty adoptions that should increase recognition of OER titles."

SURVEY RESPONDENT

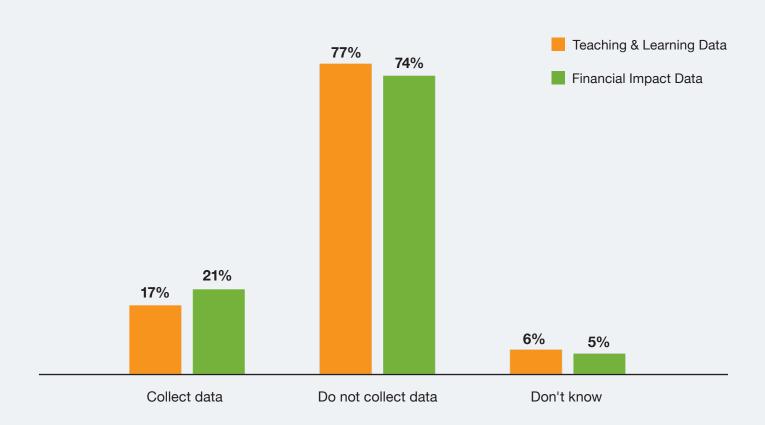FIGURE 13: Terms used to mark OER courses in course schedules or listings (N=50)

Data collection on the impact of OER is nascent, yet promising

As shown in Figure 14, approximately 20% of institutions are collecting data on the financial or teaching and learning impacts of OER. Types of data commonly collected across this small number of institutions include data on cost of course materials, student engagement, academic performance, and withdrawal and persistence in OER-based courses compared to courses utilizing traditional materials. Less commonly, institutions are collecting data on instructor engagement with OER-based course materials compared to traditional course materials, as well as data on how students interact with OER. Furthermore, several institutions indicated that they are at the beginning phases of their OER data collection, and two institutions are looking specifically to collect data on the extent of OER use on their campuses.

> " We are at the very beginning of data collection and analysis. We have data on the cost of textbooks for each department and by degree offered. We have started to examine those courses that use no-cost materials but that do not necessarily qualify as OER. We are developing a survey to determine the true extent of OER."
>
> SURVEY RESPONDENT

Figure 14: Institutions that collect OER impact data (N=98)

- Teaching & Learning Data
- Financial Impact Data

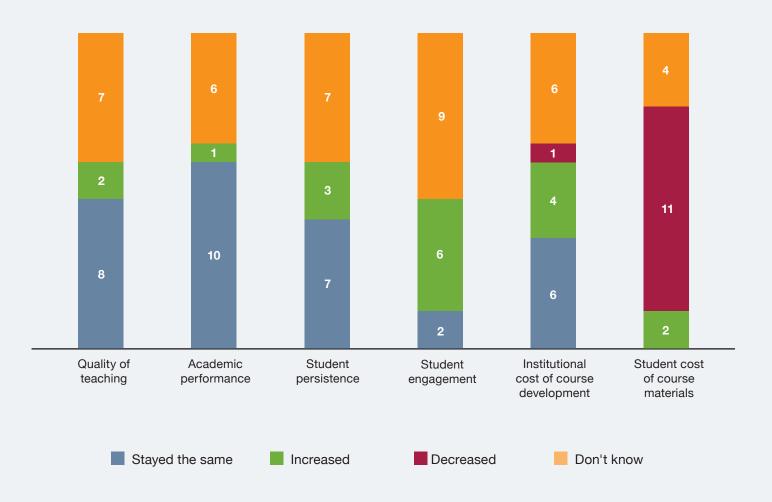|	Collect data	Do not collect data	Don't know
Teaching & Learning Data	17%	77%	6%
Financial Impact Data	21%	74%	5%

The institutions that are not collecting OER impact data report that impact information is primarily anecdotal, siloed within specific OER projects, or not gathered yet due to the infancy of their OER programs. Furthermore, the survey revealed that small institutions are less likely than large institutions to collect data specifically on the financial impact of OER (X^2(2, N = 93) = 6.696, p <. 010).

When specifically asked about the results of their data analysis efforts, the majority of the 17 responding institutions reported that teaching quality, student persistence and student academic performance either stayed the same or improved through the use of OER (Figure 15). These institutions also most commonly reported that the cost of course materials decreased for their learners; however, the cost of course development typically increased or stayed the same.

> " Data show that student retention and A-C success rates are the same or slightly higher for OER courses when compared to the same course taught using non-OER materials."
>
> SURVEY RESPONDENT

Figure 15: OER Efficacy by Impact Indicator (N=17)

Legend: Stayed the same | Increased | Decreased | Don't know
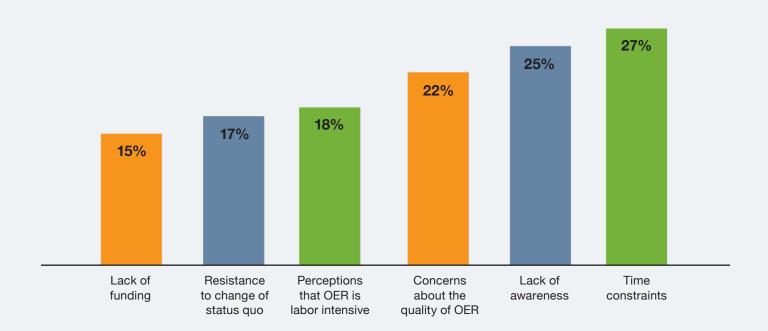
Lack of faculty awareness and existing priorities serve as principal barriers

Seventy-two percent of institutions reported that less than 10% of their faculty have been trained in OER, and many institutions indicated that lack of faculty awareness and buy-in serve as core barriers to expanded OER uptake and use. More specifically, when asked an open-ended question about the top challenges that hinder OER use (Figure 16), institutions most commonly cited time constraints, lack of awareness or understanding of OER, and concerns about the quality of OER.

Furthermore, examination of the survey responses of the nine institutions that do not have plans to develop or implement OER policies and/or programs revealed barriers related to the dominant role that proprietary textbooks and inclusive access models play at their institutions, the lack of evidence on the benefits of OER, and the limited support by faculty and administrators for OER especially in light of quality concerns.

" [Our challenges include] lack of awareness/backward thinking (i.e. 'if it's free, it can't be good'; 'must stick with print books by top scholars')."

SURVEY RESPONDENT

FIGURE 16: Institutional challenges to OER adoption and use (N=95)

Lack of funding	Resistance to change of status quo	Perceptions that OER is labor intensive	Concerns about the quality of OER	Lack of awareness	Time constraints
15%	17%	18%	22%	25%	27%

Conclusions

On the whole, the survey findings reveal that those leading the way in OER across Texas are appointing dedicated committees to shepherd the OER work at their institutions, allocating resources to OER training for faculty and for the development of OER, and collecting data on the impact of OER use. Four-year public institutions and institutions serving a large percentage of Pell Grant recipients are leading the charge in many of these activities, likely due to greater access to financial and human resources than their counterparts. However, two-year institutions are leading the way in developing zero-cost credential programs and in prioritizing OER as a mechanism to enhance student engagement in course materials. A small number of bellwether institutions are also sharing their OER externally with other institutions in national OER repositories, articulating concrete open licensing policies in their intellectual property guidelines, and collecting innovative OER impact data, such as data on instructors' level of engagement in OER compared to traditional course materials.

Supporting further expansion of these promising efforts necessitates institution, system, and state level support as colleges and universities work to more effectively utilize their resources to increase instructor and student use of OER. Key implications center on the necessity of specific operational supports and resources in identified gap areas that will enable institutions to:

- Create standardized language and definitions around OER that speak to the full benefits of OER, including their amenability to adaptations and personalization to meet local teaching and learning needs;

- Develop formal policies in support of their OER programs, including language that specifies open licensing within intellectual property guidelines and employment contracts;

- Identify new, external sources of funding for their OER work—from international and national, to state and regional, to local sources;

- Measure and build an evidence base on the impact of OER by leveraging field-tested OER indicators from empirical research (see, e.g., Open Education Group's OER Research Toolkit);

- Develop or identify effective OER training and incentive programs for faculty (e.g., the Creative Commons Certificate Program), and leverage adaptable professional learning tools (such as Ontario College's OER Toolkit); and

- Curate OER where needed to expand the range of course subjects, particularly in career and technical education, for which OER are available and can support full, zero-textbook cost credentials in these fields.

Finally, as more and more colleges and universities across Texas build out their OER programs, it is incumbent upon these OER leaders to avoid operating in silos, and to share approaches and lessons with their peer institutions—including those within and outside their existing systems and networks.

Notes

1   Definition of open pedagogical practices adapted from the OER Toolkit, by Colleges Libraries Ontario, the Ontario Colleges Library Service, and the Institute for the Study of Knowledge Management in Education, originally licensed under CC BY-NC 4.0 International License.

2   Definition of open license adapted from Permissions Guide for Educators, by the Institute for the Study of Knowledge Management in Education, licensed under CC BY 4.0 International License.

3   Mugglestone, K., Dancy, K., & Voight, M. (2019). Opportunity lost: Net price and equity at public flagship institutions. *Institute for Higher Education Policy*. Retrieved from http://www.ihep.org/research/publications/opportunity-lost-net-price-and-equity-public-flagship-institutions.

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5   Hilton, J. L., Robinson, T. J., Wiley, D., & Ackerman, J. D. (2014). Cost-savings achieved in two semesters through the adoption of open educational resources. *The International Review of Research in Open and Distributed Learning*, 15(2). Retrieved from http://www.irrodl.org/index.php/irrodl/article/view/1700.

6   Colvard, N., Watson, C. E., & Park, H. (2018). The Impact of open educational resources on various student success metrics. *International Journal of Teaching and Learning in Higher Education*, 30(2), 262-276. Retrieved from http://www.isetl.org/ijtlhe/pdf/IJTLHE3386.pdf.

7   Wiley, D., Williams, L., DeMarte, D., & Hilton, J. (2016). The Tidewater Z-Degree and the INTRO model for sustaining OER adoption. *Education Policy Analysis Archives*, 24, 41. doi: https://doi.org/10.14507/epaa.24.1828.

8   de los Arcos, B., Farrow, R., Perryman, L.-A., Pitt, R., & Weller, M. (2014). OER evidence report 2013- 2014. OER Research Hub. Retrieved from http://oro.open.ac.uk/41866/1/oerrh-evidence-report-2014.pdf.

9   Petrides, L., Jimes, C., Middleton-Detzner, C., Walling, J., & Weiss, S. (2011). Open textbook adoption and use: implications for teachers and learners. *Open Learning*, 26(1), 39-49.

10 Scholarly Publishing and Academic Resources Coalition (SPARC). (n.d.). OER state policy tracker. Retrieved from https://sparcopen.org/our-work/state-policy-tracking/.

11 Seaman, J. E., & Seaman, J. (2018). *Freeing the textbook: Educational resources in U.S. higher education*. Babson Park, MA: Babson Survey Research Group. Retrieved from https://www.onlinelearningsurvey.com/reports/freeingthetextbook2018.pdf.

12 Texas Higher Education Coordinating Board (2018). A study on the feasibility of a Texas repository of open educational resources. Retrieved from http://reportcenter.thecb.state.tx.us/reports/data/board-meeting-07-26-18-x-g-oer-repository-feasibility-report/.

13 Health-related Institutions were not included in the survey.

Survey Instrument

This survey instrument includes original questions, as well as questions adapted from pre-existing OER surveys and resources. Please see footnotes throughout the survey for the attribution of derived or reused survey items. Note that because the survey was web-based, the questions below do not reflect the web-based formatting or the skip logic.

SECTION I	OER Policies and Programs

1. **Please select your institution:**
   Institution information is used only to classify the survey responses. No individual-level data will be released, and your responses will remain anonymous in any synthesis of survey findings.

List	⌄

2. Texas Education Code, Section 51.451, defines OER as teaching, learning, or research resource that is in the public domain or has been released under an intellectual property license that permits the free use, adaptation, and redistribution of the resource by any person. The term may include full course curricula, course materials, modules, textbooks, media, assessments, software, and any other tools, materials, or techniques, whether digital or otherwise, used to support access to knowledge.

   Does your institution have a written definition of Open Educational Resources?

   ☐ Yes, and we use the same or almost the same definition as in the Texas Education Code listed above

   ☐ Yes, and we use our own definition that we have developed

   ☐ No, we do not have a written definition of Open Educational Resources

3. **How does your institution define Open Educational Resources?** Please provide a link to the definition, or paste the definition in below.

4. **Has your institution implemented policies or programs that support OER?** Select all that apply.[1]

   ☐ Yes, we have policies in place that support OER (e.g., an open licensing policy, a policy that allocates funding to OER)

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[1] Survey item adapted with permission from an unpublished survey developed for the "OER Indicators for National Adoption and Impact" initiative, under UNESCO's ICT in Education Unit.

☐ Yes, we have have programs or initiatives in place that support OER use (e.g., a training program to support faculty use of OER, and OER content development initiative)

☐ No, but we are currently in the process of creating OER policies and/or programs

☐ No, but we are interested in developing OER policies and/or programs in the future

☐ No, and we do not have plans to develop or implement OER policies or programs

---

5. To your knowledge, is anyone using OER at your institution?

☐ I do not know/not certain

☐ No

☐ Yes, please specify:

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6. When did your institution first implement its OER policy or program(s)?[2]

☐ Less than 1 year ago

☐ 1 to 2 years ago

☐ 3 to 5 years ago

☐ More than 5 years ago

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7. What has been (or will be) the focus of the OER work and/or programs at your institution? Select all that apply.

☐ Developing new OER (e.g., development of courses and textbooks from scratch and licensing them as OER)

☐ Curating existing OER (e.g., building courses, collections, or lists of resources from existing OER)

☐ Developing internal OER trainings or OER professional learning resources for faculty and staff

☐ Developing/offering an institutional repository or technologies for accessing and/or sharing of OER by faculty and staff

[2] Ibid.

☐ Developing/offering a zero cost degree program that uses OER (e.g., Z Degree or zero textbook cost degree)

☐ Supporting faculty to use OER in their courses

☐ Other

Please provide any links or comments that add detail to the items you selected above.

---

8. What are the goals for the use of OER at your institution? Select all that apply.[3]

☐ Making textbooks more affordable for students

☐ Ensuring students have access to course materials on the first day of class

☐ Increasing student engagement with course materials

☐ Supporting open pedagogy (e.g., faculty collaboration, peer review, resource sharing, iterative curriculum improvement)

☐ Decreasing the cost of course development for the institution (e.g., by remixing and adapting materials that already exist)

☐ Decreasing reliance on commercial publishers

☐ Providing materials that can be localized to meet learners' needs

☐ Providing materials that can better help to meet accessibility requirements at your institution

☐ Providing materials that can be integrated with predictive analytics or learner analytics

☐ Other, please specify:

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9. Across the country, some institutions are revising their intellectual property policies and guidelines to include open licensing. Open licensing helps public institutions better meet their missions of disseminating resources—breaking down the barriers associated with traditional copyright by granting permission to use and adapt the materials in advance.[4] For example, an institution might require that all materials created by its employees within the scope of employment be licensed as a OER under Creative Commons License.

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[3] Survey item adapted with permission from question 15 of the "Questionnaire on the Use and Production of Open Educational Resources," in Giving Knowledge for Free: The Emergence of Open Educational Resources (2007), OECD Publishing.

[4] Text from "Open Licensing Policy" by Creative Commons, originally licensed under CC BY 4.0 International License.

Does your institution have an open licensing policy or endorsement?

☐ Yes, we have an open licensing policy

☐ Yes, we have an open licensing endorsement

☐ No, we do not have anything in place, but we are planning to

☐ No, we do not have anything in place, and we do not have plans to

10. **What is your open licensing policy or endorsement?** Please describe and/or provide any links to information about the policy or endorsement.

11. **Are you aware of the THECB OER Grant Program, which provides funding for faculty projects to adopt, modify, redesign, or develop courses that use only open educational resources?**

☐ Yes

☐ No [Respondents directed to a page that briefly describes the OER Grant Program]

SECTION II OER Courses and Certificates

12. **For the fall semester/term(s) 2018, please estimate the percentage of undergraduate courses that:**

   a. were fully OER-based (i.e., all of the required materials for the course were openly licensed

   b. were not fully OER-based, but used OER as a supplement to commercial/proprietary resources

	None, or 0%	Less than 10%	About 25%	About 50%	About 75%	All, or almost 100%	I don't know
Estimate percentage of undergraduate courses that were fully OER based							
Estimate percentage of undergraduate courses that used OER as a supplement to commercial/proprietary resources							

13. For the fall semester/term(s) 2018, please list any undergraduate certificates and degrees that were fully OER-based (i.e., all of the required materials for the certificate or degree were openly licensed). For the fall semester/term(s) 2018, please estimate to what extent the following disciplines offered undergraduate courses that were fully OER based?

	None or 0% offered undergraduate courses that were fully OER based	Less than 10%	About 25%	About 50%	About 75%	All, or almost 100%	I don't know
STEM							
Humanities							
Social Sciences		–	–	–			
Career and Technical Subjects		–	–	–			

14. In June 2017, Texas signed into law Senate Bill 810 (SB810, now TEC 51.452), which requires that Texas higher education institutions share searchable information with students about courses that use OER.

Which of the following best describes how your institution has implemented the OER course marking (or identifier) requirements of SB810? Select all that apply.

☐ Links to all courses that use OER are offered on the landing page of our course schedule/listing

☐ There is a search field for OER on the landing page of our course schedule/listing

☐ There is a search field for OER on subsequent pages of our website, but not on the landing page of our course schedule/listing

☐ Under the individual course listing, there is a description or notation indicating if a course uses OER

☐ The course is listed as OER through the campus bookstore

☐ Not applicable/not yet implemented

☐ Other, please state:

15. Which of the following are used at your institution to mark/identify these courses in your course schedule or listing? Select all that apply.[5]

☐ OER

☐ Free

☐ Zero cost

☐ Low cost

☐ Affordable

☐ Other (please specify)

<table>
<tr><td>SECTION III</td><td>OER Leadership and Collaboration</td></tr>
</table>

16. Is there a centralized office, committee, or role that oversees (or will oversee) the OER work at your institution?

☐ Not relevant - There is no OER work planned or in place at our institution

☐ No

☐ Yes, please specify:

17. What role do librarians/library staff play in supporting OER at your institution? Select all that apply.

☐ Providing OER as part of library resources

☐ Curating OER to meet targeted teaching and learning needs and gaps

☐ Advocating for the use of OER

☐ Holding training(s) or workshops on OER and/or open licensing

☐ No role currently

☐ Other, please specify: _____

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[5] Survey item adapted from question 13 of the "Milestones Reporting Form: OER Course Marking Solutions," University of Texas, Arlington, reused with permission under a CC BY 4.0 International License.

18. Is there an organized student group that advocates for or supports OER at your institution (e.g., student PIRGs, student-led social media campaigns, students creating OER)?

☐ No

☐ Yes, please specify:

Please describe any other roles at your institution that currently support, or are necessary to support, OER adoption and use among faculty (e.g., institutional leaders, instructional designers, bookstore staff, others).

19. Is your institution involved in any collaboration with other educational institutions on OER?[6]

☐ No, not currently, and no such collaborations are planned

☐ No, but we are planning a collaboration in the future

☐ Yes, please specify: _____

SECTION IV OER Enablers and Barriers

20. In the past 3 years, has your institution allocated funding to any of the following OER-related initiatives? Select all that apply.[7]

☐ Yes, funding to create awareness for OER

☐ Yes, funding for OER capacity building/training

☐ Yes, funding for the creation of new OER

☐ Yes, funding for the curation of existing OER

☐ Yes, funding for the use of OER by faculty

☐ No, we have not allocated funding to OER-related initiatives in the past 3 years

☐ Other, please specify:

[6] Survey item adapted with permission from question 9 on the "Questionnaire on the Use and Production of Open Educational Resources" in Giving Knowledge for Free: The Emergence of Open Educational Resources (2007), OECD Publishing, Paris.

[7] Survey item adapted with permission from an unpublished survey developed for the "OER Indicators for National Adoption and Impact" initiative, under UNESCO's ICT in Education Unit.

21. Currently, how is your institution funding its OER work? Select all that apply.

☐ Internal funding

☐ State funds

☐ Federal funds _____

Please name the specific source of the funding for each item selected above.

22. Approximately what proportion of faculty at your institution have attended internal or external trainings specifically on OER? Please estimate to the best of your knowledge.[8]

☐ None, or 0%

☐ Less than 10%

☐ About 25%

☐ About 50%

23. Have library staff at your institution attended training specifically on OER?

☐ No

☐ Yes

24. Please describe the OER training opportunities that have worked best at your institution, in terms of enabling OER use.

25. Which of the following incentives does your institution offer, if any, to encourage faculty use of OER? Select all that apply.

☐ Stipends to encourage OER projects

☐ Reassigned time or release time for planning or collaboration on OER

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[8] Ibid.

☐ Public acknowledgment or recognition when faculty use OER

☐ Embedding OER within faculty performance review and appraisal processes

☐ Certification or badge system tied to OER use

☐ We do not offer incentives

☐ Other, please specify:

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26. What top two factors or supports are needed to increase OER adoption and use at your institution? Please list below.

1.

2.

---

27. What top two challenges or barriers are there that hinder OER adoption and use at your institution? Please list below.

1.

2.

| SECTION V | Impact of OER |

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28. At your institution, are data being collected to track the impact of OER use? If needed, check with your institutional Research Office to help you answer this question.[9]

	Yes	No, not currently	Don't know
Is your institution collecting data on the financial impact of OER? (e.g., savings to students, savings to the institution)			
Is your institution collecting data on the teaching and learning impact of OER? (e.g., student performance in OER courses, changes in teaching practices)			

---

[9] Survey item adapted with permission from an unpublished survey developed for the "OER Indicators for National Adoption and Impact" initiative, under UNESCO's ICT in Education Unit.

29. Based on the available analysis of data, please rate whether OER has improved each of the following at your institution. If needed, check with your institutional Research Office to help you answer this question.[10]

	Decreased	Stayed the Same	Increased	Don't know
Quality of teaching				
Student academic performance				
Student persistence in courses or programs				
Student engagement in courses or materials				
Availability of high quality materials				
Cost of course development for the institution				
Cost of course materials for learners				

Please provide comments explaining your answers, including any data or information that your answers may be based on.

SECTION VI

Demographic information is used only to classify the survey responses. No individual-level data will be released, and your responses will remain anonymous in any synthesis of survey findings.

30. Please list your job title. (This will help us to understand the types of roles that may be involved in OER across institutions).

What role, if any, do you play in the support of OER at your institution?

[10] Ibid.

60×30TX

Texas Higher Education
Coordinating Board

Agency Mission

The mission of the Texas Higher Education Coordinating Board (THECB) is to provide leadership and coordination for Texas higher education and to promote access, affordability, quality, success, and cost efficiency through 60x30TX, resulting in a globally competitive workforce that positions Texas as an international leader.

Agency Vision

The THECB will be recognized as an international leader in developing and implementing innovative higher education policy to accomplish our mission.

Agency Philosophy

The THECB will promote access to and success in quality higher education across the state with the conviction that access and success without quality is mediocrity and that quality without access and success is unacceptable.

The Coordinating Board's core values are:

Accountability: We hold ourselves responsible for our actions and welcome every opportunity to educate stakeholders about our policies, decisions, and aspirations.

Efficiency: We accomplish our work using resources in the most effective manner.

Collaboration: We develop partnerships that result in student success and a highly qualified, globally competitive workforce.

Excellence: We strive for excellence in all our endeavors.

Founded in 2001, the Texas Higher Education Foundation proudly serves as the nonprofit fundraising arm for the Texas Higher Education Coordinating Board. Since 2001, the Foundation has been a leader in developing new programs, conducting quality research, and mobilizing partnerships around the state to promote higher education access, affordability, quality, and success. The Foundation's founding principles of collaboration, equity, and accountability continue to guide trustees and staff as they partner with ISDs, postsecondary institutions, businesses, foundations, and nonprofit organizations to ensure the success of the state's higher education strategic plan, 60x30TX.