

## **Orbis Cascade Alliance**

**Group:** OER Standing Group of the Unique & Local Content Team

**Date:** 2018 June 1

**Title:** Opportunities for Partnerships in Support of Open Education at the Alliance

### **Group Members:**

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Open education can mean many things to many audiences. For the purpose of this report, the primary focus is Open Educational Resources (OER) commonly adopted as principal resources in college and university classes (i.e., largely textual OER). Consistent with the clarification the ULC Team received from the Council last summer, our exploration focuses on OER rather than the larger discussion on affordable content. For a broad overview on OER, we recommend taking a look at Robin DeRosa's [Open Education Intro](#).<sup>1</sup>

### **I. Executive Summary**

This year (FY18), the Board asked the Open Educational Resources Standing Group (OER SG) to create a report for the Board and Council recommending areas of Alliance contribution to the open education arena. The specific focus of this charge was on an exploration of possible partnerships with existing OER organizations.

Based on our research of the OER landscape, the OER SG recommends that the Alliance builds a community of practice around open education by:

- a) Assuming responsibility for curating and further developing the *Pacific Northwest OER Directory* (<https://sites.google.com/site/pnwoer/>). This recommendation was submitted to the Alliance under the initiative name, "[Support for Pacific Northwest Directory \(A Small-Scale Investment in OER\)](#)."
- b) Collaborating with other consortia to identify best practices for handling OER discovery in a shared ILS. This recommendation was submitted to the Alliance under the initiative name, "[OER Metadata and Discoverability \(A Medium-Scale Investment in OER\)](#)."

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<sup>1</sup> Robin DeRosa, "Open Education Intro," 31 January 2016, available at [https://www.youtube.com/watch?v=t7msF\\_BN3Jo](https://www.youtube.com/watch?v=t7msF_BN3Jo).

This report presents background information on the two initiatives for partnerships, including an explanation of the SG’s charge, its background work, and recommendations including related rationale and hypothetical use cases demonstrating the benefits of the suggested areas of Alliance involvement.<sup>2</sup>

## **II. Our Charge: Continuing the work of the 2016-2017 OER WG**

Open education--particularly open educational resources, such as open textbooks and learning objects--contributes to the affordability of higher education, which in turn impacts student retention. In recognition of the importance of this topic, the Alliance established the OER Working Group (OER WG) in FY17 (2016-2017). (They, in turn, carried on the work of a small exploration work group in FY16.) The work of this group brought forward three high-level recommendations:

1. Pursue advocacy and professional development opportunities related to OER;
2. Support discovery, hosting, and curation of OER;
3. Support textbook affordability initiatives.

In the following year, the Alliance Board and Council asked that the OER SG focus in FY18 on the first task, “advocacy and professional development opportunities related to OER,” with the following charge:

1. Produce a report for the Board that documents opportunities for partnering with existing OER advocacy organizations. Examples of such involvement could include:
  - Supporting a directory of local OER expertise or regional mentorship programs;
  - Demonstrating increased points of contact between OER experts and novices in the Pacific Northwest;
  - Demonstrating how OER initiatives have expanded at member campuses.
2. Produce a set of best practices intended for Alliance member staff that deal with production, review, dissemination, and/or preservation of open educational resources, and share this material in the Alliance's Documentation Center.
  - These best practices were to focus particularly on needs specific to the Alliance, including, but not limited to, management of OER in the Shared ILS.

This report responds to the first of these charges. The second is managed through the OER SG’s ongoing work through 2018 December.

## **III. Background Work**

To address our charge of identifying potential partnerships, we built on the environmental scan conducted by the OER WG of 2016-2017 by speaking with identified OER champions across the country who are managing library consortia and OER networks. We looked for

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<sup>2</sup> There were three OER initiatives submitted in Spring 2018 for consideration by the Alliance. This report does not address the initiative, “[Central Support for Open/Affordable Learning Initiative \(A Large-Scale Investment in OER\)](#),” since it goes beyond the scope of the group’s original charge as described in this report.

what the Alliance could do that would not be duplicative of existing work and that would provide broad benefit to members. With this in mind, we spoke to the following groups/individuals:

- Amy Hofer of Open Oregon (Oregon)
- Gwen Evans of OhioLINK (Ohio)
- Teri Gallaway of LOUIS (Louisiana)
- Allison Brown and Mark McBride of Open SUNY (New York)
- Elijah Scott of FALSC (Florida)
- Dave Ernst and Karen Lauritsen of Open Textbook Network (Global)
- Cable Green of Creative Commons (Global)

The OER SG discussed a range of collaborative project ideas with these individuals. First, we began with the suggestion of “partnership projects” outlined by the previous OER WG and concluded the following:

- In response to the first OER WG suggestion, ***provide support for a directory of local OER expertise***, we identified the [Pacific Northwest OER Directory](#), an established collaborative project to connect OER advocates in the Pacific Northwest. Based on the group’s conversations with the founders of the Directory, this is a project that gives Alliance members access to a wide-ranging scope OER expertise as well as contacts for OER projects that might be adaptable to each Alliance member's needs.<sup>3</sup> This *Directory* was originally put together by volunteers, some of them members of the Alliance, but has no specific sustainability plan.
  - We recommend that the Alliance ensure the stability and development of this resource to ensure that librarians within the Alliance continue to have this resource. The OER SG or a separate Alliance group of interested members could provide support for this Directory. This a relatively small investment of time that would result in significant benefits, allowing institutions to improve networking and development of OER without replicating existing resources.
- In response to the next OER WG suggestion, ***support regional mentorship programs***, it is clear that a wealth of mentorship opportunities currently exist for our region, including offerings and communications from OpenStax, Open Oregon, WCET, Open Textbook Network, SPARC, iOPEN, and Open Washington.
  - Considering the already overwhelming landscape of such OER activity, the OER SG believes that there is no additional benefit in replicating these efforts at the consortial level. In particular, we believe that there is no special need for an additional OER listserv/discussion group for Alliance members unless such a listserv/group has a unique focus as yet unidentified.
- In response to another OER WG suggestion, ***document how OER initiatives have expanded at member institutions***, the OER SG noted that groups including Open

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<sup>3</sup> PNW OER Directory, available at <https://sites.google.com/site/pnwoer/>.

Textbook Network, OpenStax, and SPARC have already begun collecting statistics about open education programs at the national level (see, for instance, [Connect OER](#) by SPARC). Similarly, at the state level, there are efforts to monitor and report the progress of OER adoptions and student savings at individual institutions (see for example, reports by Open Oregon such as [Two Years and a Big Difference](#)).

- The OER SG, therefore, concluded that the Alliance would duplicate effort by attempting to collect outcomes data for the consortium, although the consortium might mine these results to demonstrate collective impact.<sup>4</sup>
- Finally, in response to the suggestion that the Alliance *pursue OER advocacy via already established discussion venues such as the Greater Western Library Alliance (GWLA)’s 2018 OER summit*, the OER SG acknowledges the importance of this gathering as a means of building community around open education in the western U.S. but recommends further action.
  - Given the focus of this report on the need for special attention on OER and metadata templates and practices, the group recommends instead convening focused discussions around these issues. We believe that the Alliance is well-positioned to be a convener in this space as it brings together different perspectives, including those of two-year, four-year, and graduate public and private institutions, as well as experiences from having undertaken large-scale migrations to shared discovery platforms. GWLA is doing excellent work in convening OER practitioners generally but seems to be less focused currently on these issues, as reflected in the diverse themes included in the 2018 summit, [OER: From Vision to Action](#). Hackathons, focused in-person conversations, and working-group style collaboration are more likely to produce the kind of tangible results the OER SG envisions.

#### **IV. Recommendations for Alliance OER Involvement**

Based on our investigation and previously suggested areas of interest listed above, the OER SG found that:

- a) the *Pacific Northwest Directory* provides a fairly easily implemented opportunity for the Alliance to build community regionally around open education and also provides continuity for this project. We recommend this as one of the areas of consideration for a possible Alliance initiative, and the OER SG submitted this project as part of the consortium’s strategic planning process. For further information, please refer to

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<sup>4</sup> Scholarly Publishing and Academic Resources Coalition, *Connect OER*, available at <https://sparcopen.org/our-work/connect-oer/>; Open Oregon, “Two Years and a Big Difference,” 17 January 2018, available at <http://openoregon.org/two-years-and-a-big-difference>.

initiative, “ Support for Pacific Northwest Directory (A Small-Scale Investment in OER).”

- b) Our second recommendation emerges from a strong theme in our conversations with OER library practitioners across the country: the need for consensus on use of standards to describe open educational resources to improve discovery. Since this is a new potential area for Alliance involvement, the sections below focus on the rationale and benefits of our proposed metadata initiative. For further information, please refer to initiative, “ OER Metadata and Discoverability (A Medium-Scale Investment in OER)” as well as the discussion that follows in the next two sections as this particular initiative was the major focus of research and investigation by the OER SG this past year.

### **OER Metadata and Discoverability Initiative: Rationale**

The current OER landscape finds open educational resources to be scattered across many different sites and platforms, resulting in an inefficient discovery process for faculty, students, and librarians. In addition, the OER presence within the library ILS environment has received very little attention as a way to promote awareness of, access to, and use of these resources. On the whole, the need for common metadata practices and workflows to enhance access and discoverability for OER has yet to be addressed.

The article “[Usability of Metadata Standards for Open Education Resources](#)” describes the complexity of the issue of OER metadata outside the library world, including one prominent effort, OER Commons, which currently uses Dublin Core to enable discovery of its OER.<sup>5</sup> Efforts at OER Commons are notable, in part, because the project endeavors to “embed information about the alignment of resource[s] with educational standards, such as Common Core.” However, as this article notes, such projects are often challenged on the usability of their metadata standards, given that they are based on volunteer or novice work. Controlled vocabularies are also identified as crucial to the improvement of OER discovery generally.

The OER Commons project illustrates that, while metadata standards already exist to enable discovery of OER (e.g., Dublin Core and Learning Object Metadata), use of these standards is highly variable. Individual repositories, libraries, and organizations are making different decisions about how to use existing standards, and the result is chaotic for users. The age of the Ushakova article above (2015) also hints at the need for more work in this area. Although discovery has been identified repeatedly in studies as a barrier for use of OER, few coordinated approaches have been undertaken to address these concerns.

The introduction in 2017 of the [George Mason OER Metafinder](#) further underscores these issues; the Metafinder is designed to uncover OER in a variety of digital collections but, as noted by the project developer in private correspondence, the tool is severely limited by the

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<sup>5</sup> Svetlana Ushakova, “Usability of Metadata Standards for Open Educational Resources,” *HCLE Virtual Museum – The Blog*. October 2, 2015, available at <https://hclmuseum.wordpress.com/2015/10/02/usability-of-metadata-standards-for-open-educational-resources/>.

variability of the metadata it is able to harvest.<sup>6</sup> Users face limitations in their ability to search effectively by license, publisher, date, and material type. While we propose an initial focus on standardizing the description of OER in the library's discovery layers, we will no doubt impact the ability for the open education community to build more effective, aggregated search tools like the Metafinder in the future.

Moving from the larger environment of OER discovery to the environment within Orbis Cascade Alliance, we find that there is no existing coordinated effort to make OER collections, such as Open Textbook Network (OTN) records and locally created OER materials, visible within the consortium. Even when OER are retrievable via an individual member's Primo instance, there is no easy way to locate, facet search, or filter OER-relevant results. Furthermore, if OER catalog records exist in shared zones (network or community) there are no clear criteria for item inclusion, visibility, or availability for the benefit of the membership. Sharing and discovery of open educational resources in a multi-state consortial environment, such as the Alliance, may present unique challenges as interests and needs may differ from those of local or even state-focused OER efforts. However, by addressing these challenges, the Alliance can provide a model for other complex negotiations around discovery of OER.

Focusing on OER metadata for cataloguing purposes, the OER SG's proposal is to develop best practices and workflows that might include efforts such as standardizing use of Dublin Core and MARC for OER description, establishing version control guidelines, and developing criteria for including OER within the Shared ILS. Through such consortial metadata best practices and workflows, OER will become more easily discoverable. These practices will also allow for clearer sharing of OER created by Alliance member institutions and will facilitate and promote OER adoption within the Alliance, ultimately enhancing the impact member libraries have on student affordability and retention, as well as empowering faculty to develop innovative pedagogy.

While we propose that the Alliance focus its attention on the Shared ILS as a tool for promoting OER discovery, we want to stress that wider conversations with groups outside of the library are paramount. Clearly, as evidenced by large-scale projects such as OCLC and Library of Congress bibliographic records, libraries have the ability to significantly impact the discovery of resources through standardized vocabularies, schemas, and practices. By undertaking this initiative, the Alliance would no doubt impact practices in use by external repositories and projects and be impacted in turn, should it choose to harvest materials from external collections. We propose focusing initially on standardizing the MARC templates that we use in the Shared ILS but also engaging in larger conversations about OER and metadata. With greater standardization will come a better search experience for everybody.

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<sup>6</sup> Mason Publishing Group, Mason OER Metafinder, available at <https://publishing.gmu.edu/whos-using-the-mason-oer-metafinder/>.

To create a community of practice around OER discovery and to make OER more easily discoverable using the Alliance's investment in a shared ILS, we recommend that the Alliance engage in the following actions for FY19:

- Expand on collaborative work between the OER Standing Group and Shared Content & Technical Services Team (and its component groups) to identify practices for improving discovery of OER in Primo. This spring (FY18), the OER SG is working with SC/TS and its component groups to identify a small set of priority issues from which to develop best practices for OER in the Shared ILS. This work should be followed, in FY19 and beyond, by a more expansive approach to identifying areas where standardization and shared best practices can increase efficiency of work and discovery.
- With support from the Unique and Local Content and Shared Content & Technical Services Teams, we recommend convening other library consortia peers (including, but not limited to, GWLA, OhioLink, LOUIS, and SUNY/CUNY) to address unique challenges of OER discoverability and metadata standards associated with an ILS environment. We hope to undertake this work primarily via existing in-person conferences (such as OpenEd), virtual meetings, and/or hackathons with specific outcomes including development of MARC templates, tools, or best practices related to OER. Details of those outcomes will need to be created in collaboration with the other library consortia. We expect that this work would mainly require the commitment and collaboration of standing group members, hopefully with minimal Alliance financial or staff impact. In this report, we are primarily seeking support for the proposed initiative concept and acknowledge that specific events such as hackathons would need to be approved at the time that they are proposed by team/group members.

The OER SG believes that OER metadata and discoverability within the shared ILS is an area where the Alliance can play a leading role for the library profession by applying its existing expertise in resource description and discovery. In addition, the Alliance can be instrumental in creating a broader community of practice that breaks down current library consortium silos to better leverage shared OER and library expertise.

### **OER Metadata and Discoverability Initiative: Benefits for the Alliance**

Overall, the OER SG contends that the initiative identified in this report is well-suited to Orbis Cascade Alliance because of the consortium's unique constituency (including community colleges and four-year institutions) and its unique expertise in migrating to common, shared platforms that enable discovery of library resources. The work builds on the success of the Unique & Local Content Program's Digital Collections Service, which has successfully created shared best practices for digital collections described in Dublin Core and been a national leader in applying standardized rights statements and Creative Commons licenses to digital objects. The OER work is fundamentally the same as the digital collections, and we are in a good position to be successful.

In addition, an initiative focused on OER discovery would provide specific benefits for Orbis Cascade Alliance, which include:

- Overall, more effective use of our SILS as a discovery tool for the membership.
- Improved cataloguing practices developed via collaborative work with other library and state consortia.
- Improved OER visibility in Primo, which in turn will help with discovery of as well as advocacy for the use of these resources.
- Improved discovery experience for the larger Ex Libris community. Other consortia using Ex Libris products have expressed interest in these issues and our combined work could benefit the community as a whole.
- Growth for the profession overall. Engaging technical services and systems librarians in OER initiatives has been limited so far (the OER movement has drawn the interest of librarians mostly outside the technical and cataloguing fields). This is an opportunity for the Alliance to identify and engage unique library expertise in a challenging set of issues.
- Heightened profile for the Alliance as it assumes a leadership position with high impact in an area where libraries can make visible and measurable contributions to student success.
- Realization of the mission statements pursued by individual Alliance members in regards to equity, retention, and student costs. This initiative also relates to the Alliance's vision for equity by promoting OER as innovative resources to transform student learning.

The OER SG contends that without the Alliance's investment in this initiative, we may lose an opportunity to increase our consortium's direct relevance to our students' academic lives. As students struggle with the ever-rising cost of tuition and course materials, it is imperative that libraries support efforts like these to ensure equitable access to higher education. The hope is that the Alliance will prioritize work in this area as it identifies its future initiatives.

### **OER Metadata and Discoverability Initiative: Use Cases**

#### ***A Hypothetical Scenario Illustrating Desired Outcomes: Shared and Unique Metadata in Discovery of OER***

##### **Scope**

Collaborative discovery services such as Summit and Archives West have demonstrated the value of sharing resources and metadata across the Alliance. In a similar vein, sharing metadata access for OER across Alliance institutions would enable better discovery, access, and use of these materials, and benefit teaching and learning across member institutions. This is only possible through the implementation of shared metadata standards and centralized coordination of display and search functionality in the SILS for OER.

##### **A Typical Use Case**

A faculty member at Pine State University wants to find affordable materials for her psychology course in the fall to help her students with college costs. She asks around and hears that she may want to check Open Textbook Library, OER Commons, MERLOT, BCcampus, and select listservs for suitable OER options, as well as contacting her liaison librarian for recommended ebook options. Over the summer, the faculty member needs to complete all of these searches as well as coordinating five research projects and prepping classes for the fall. She is overwhelmed. She gives up and loses interest in her affordability project.

However, Orbis Cascade Alliance enters the scene with its best practices for sharing OER collections in the Shared ILS. Our faculty member repeats her search using the local instance of Primo. OER records now use metadata standards that allow the effective discovery of open resource course materials. The collaboration between Orbis Cascade Alliance and other library consortia allows the faculty member to explore within and beyond the Alliance's collection of materials created with Creative Commons licenses. She's able to use one single tool to find open texts developed at Pine State as well as schools like UMass Amherst and UT Austin. These are resources she might never have otherwise found due to their limited visibility. An additional advantage for her is that she can now search for both OER and library-licensed ebooks using the same tool.

The professor is able to find useful OER resources for her classes and remix them into her own Pressbooks version. Once she has completed her new text for her course, she passes word to the campus library, which creates a record in Primo, documenting this new resource with appropriate versioning and licensing information based on Alliance best practices developed in collaboration with external partners and Primo users.

The students at Pine State benefit from high-quality yet inexpensive course materials that the faculty member was able to develop more efficiently by relying on the larger open education community. Students taking this instructor's psychology courses throughout the year save an estimated \$30,000 and university administration commends the professor and library for their efforts.

### **End Users This Supports**

Student (undergraduate)

Student (graduate)

Teaching faculty

Administrator

### **Internal Users This Supports**

Librarian

### **Objectives & Impacts**

- Provide discovery of and access to OER in a manner similar to that provided for commodity collections.

- Promote consortium-wide initiatives that address common needs.
- Support collective efforts to increase visibility and access to OER—both within and outside of the Alliance.
- Make decisions about collective approaches to OER discovery that consider the characteristics of individual institutions and the role of OER materials for teaching, learning, and scholarship at each member institution.