

RESEARCH REPORT

A Place for Policy: The Role of Policy in Supporting Open Educational Resources and Practices at Ontario's Colleges and Universities

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for eCampusOntario

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Introduction

What can institutions of higher learning do structurally to improve the uptake of open educational resources and practices?

That is the basic question guiding this report. Policy is a tool with which institutions structure their affairs, determine their organizational stance on particular issues, and create the framework for guiding the direction of their work.

This study, commissioned by eCampusOntario, considers the benefits of open educational resources and practices (OER/P) and the obstacles hindering their uptake at colleges and universities. Focusing on institutional policy, this report makes the case that targeted policies can remove some of the obstacles facing OER/P.

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Remit

The goal of this report is to examine current initiatives in the realm of OER/P policy. The RFQ requested the following:

- An environmental scan identifying up to five existing institutional policies at a North American higher education institution that mention or expressly support open educational resources and/or practices
- A detailed analysis of the aforementioned policies
- A model of an open education policy for Ontario colleges and universities to adopt and adapt for their local context
- A completed report outlining the researcher's methods, results, and rationale for the text of the model policy

In addition, this report provides an overview of the benefits of OER/P and the obstacles that hinder their uptake. This information is provided because it forms the context as to why policy frameworks are required. In addition, since this report will be used by many who are new to OER/P, providing a summary of benefits and barriers provides much needed context for them.

Methodology

The research for this report is derived from three main sources:

1. An extensive literature review
2. An examination of the OER/P policies in place at select higher educational institutions in Canada and the United States
3. Background interviews (email and audio) with informants selected from information acquired during the literature review

The research was conducted to establish OER/P benefits and barriers in order to provide context for the review of existing policies.

Definitions

Policy: high-level institutional principles and commitments endorsed by the institution's governance processes.

Open educational resources (OER): As defined by UNESCO, the most comprehensive and universally accepted definition of OER, and taken from the eCampusOntario website:

Any type of educational materials that are in the public domain or introduced with an open license. The nature of these open materials means that anyone can legally and freely

copy, use, adapt and re-share them. OERs [sic] range from textbooks to curricula, syllabi, lecture notes, assignments, tests, projects, audio, video and animation (UNESCO, 2013).

Open Educational Practices (OEP): broader than but including OER, OEP captures pedagogical activities and approaches that foster a shared, collaborative approach to teaching and learning that is informed by the same spirit as found in OER.

A Note on the Word “Policy”

In higher education, “policy” is a fluid term that can have different meanings according to institutional context and local practice. For example, at the University of Waterloo, a policy is a document approved by either senate or the president. When educators in the United States hear the word “policy,” however, they are more likely to think of an initiative of their state legislature.

There is a distinction between policy and operational supports. The former is a high-level institutional set of principles and commitments to open educational practices and resources (OER/P) that has been endorsed by the institution’s governance process. Operational supports, on the other hand, are understood to be those processes and structures that fall short of policy (in terms of being sanctioned by the institution’s governance processes) but which nevertheless serve to make OER/P part of an institution’s operational structure. Operational supports include such things as OER/P committees and budget line items (dedicated staff, course development resources, etc.).

Yet, since some institutions make less rigid distinctions between these two concepts of policy than others, and since they can intermingle depending on the local context, this report has examined a gamut of policy initiatives, and makes recommendations that span the policy spectrum (i.e., from high-level institutional principles to more basic issues like funding).

Benefits of Open Education

Open educational resources and practices (OER/P) bring with them many benefits for institutions of higher learning. Some of these advantages may not be exclusive to OER/P, but others are, and they can be grouped in five broad categories.

Cost factors: OER relieve financial pressure on students

Advocates of OER/P are quick to point out the financial savings that come with open learning materials. Recent estimates in Ontario of the average annual cost per student for textbooks and course materials vary by institution: \$700–\$1,500 (Ryerson University, 2019); minimum of \$1,000 (University of Toronto, 2018); \$1,200 for incidental fees, books, and supplies (Algonquin College,

2019.); \$1,500-\$3,000 (Western University, 2019); \$2,150-\$4,000 for first-year students (University of Waterloo, n.d.); and anywhere from \$1 up to \$5,385 for materials and supplies (George Brown College, 2019).

In order to indicate the financial benefits of OER adoption, many institutions and organizations publish statistics indicating overall savings. Some statistics, like those provided by Kwantlen Polytechnic University or BCcampus, provide information on how their calculations were made, but many do not. In any event, the potential savings to students are substantial. OpenStax, the OER operation based at Rice University, estimates that students saved US \$77 million in 2017 (Melendez, 2017) and US \$177 million in 2018 (Johnston, 2018). In early 2019, BCcampus reported over \$10 million in savings, and eCampusOntario \$2.2 million (BCcampus, 2019).

A related argument in favour of OER is the role it can play in reducing or removing barriers to access. The information available indicates that students will balk at purchasing expensive textbooks. They will look for alternatives (used copies, library copies, etc.) or even wait until later in the semester to purchase the material (e.g., in preparation for an exam). Other students will collectively purchase one copy of a textbook and share it among themselves. In all these instances, students will not have full access to the course materials from day one of term. In other words, it's less about saving students money, and more about removing barriers so that students can have early and persistent access to course materials.

Publishing factors: New methods of deploying courseware

More pressing than textbook cost is the form that textbooks will take in the future, and here, too, OER can play a beneficial role. The publishing industry as a whole, including book distribution, is in the midst of rapid change and transformation. University bookstores have seen textbook sales, a mainstay of their business model, decrease—in some cases precipitously—and have embraced diversification and other strategies to make up the lost revenue. One reason for the decrease is that students, like other consumers, frequent online retailers.

Another reason—potentially more disruptive—is that publishers are embracing various models of online publishing to market their products, allowing them to sell directly to their customers (students) if they so wish. At the same time, they are developing not just online textbooks, but online study, testing, and teaching materials that provide comprehensive coverage of a course topic. Known by different names, this “inclusive access” is often a subscription-based model: students don't own the materials but rather have access to them for a specific period. And whereas students could find other ways of accessing textbooks (e.g., buying used, renting, borrowing from the library), many publishers are beginning to offer online assessment packages/systems that can only be purchased from the publisher. These systems also make it possible for instructors to require students to complete these prepackaged assessments as part of their coursework, creating a captive market since students will have no option but to purchase access.

Traditional textbook publishers are not the only ones in this commercial space; newer companies such as Top Hat and DigitalEd (makers of the Mobius platform) have business models predicated on producing learning materials available solely through their delivery platforms. OER, by contrast, provide evergreen access to materials and do not require subscriptions or other fees. Seaman and Seaman (2018) point out that 37% of US faculty surveyed in 2018 make homework systems a course requirement. This rises to nearly one-half (48%) among faculty teaching large enrollment introductory-level undergraduate courses. As early as 2012, McGreal was providing examples of problematic practices present in proprietary materials, such as prohibitive licensing and restrictions on format shifting, localization, and content sharing. These restrictions highlight the need for OER, that “by definition have minimal if any restrictions” and “are technologically neutral, transmittable on different platforms and when built using commonly accepted or open software conforming to international interoperability standards, can be transported with little effort or concern by the users.” (McGreal, 2012, p. 683).

These new publishing models also have hybrid variations that allow institutions to claim interest in serving students better. The University of Waterloo’s Faculty of Mathematics has entered into a cooperative venture with DigitalEd to produce courseware for the platform, and that has allowed one class to dispense with a \$150 textbook in favour of freely available courseware that incurs a cost only if the student chooses to have a hard copy. This courseware will be marketed by DigitalEd as part of its Mobius platform, and the University of Waterloo will earn a commission on the sale of those materials.

Learning factors: OER support better learning and teaching

The lack of “day one access” mentioned earlier can have an impact on student success. OER can play a role in student retention. Perhaps the largest study in this regard was that done by Colvard, Watson, Edward, and Park (2018) on the impact of course-level OER adoption on over 21,000 students across the University of Georgia system over a multi-year period. It revealed that students in OER courses attained better end-of-term results, and that this improvement was seen in all students including those from historically disadvantaged groups:

Although drop-out rates were not examined as part of this study, it is logical to deduce that reducing the number of students who fail would have a positive impact on retention. As noted above, OER were found to significantly decrease DFW rates across a range of demographics. They also have a more pronounced impact on grades for those who start further behind, are in financial need, and/or are among populations that have been historically underserved by postsecondary education. OER [speak] to the aforementioned attainment gap as well. Still further, there is an expectation that grades are an indicator of student achievement within course settings, and by simply ensuring that all students, regardless of need or background, have access to course materials on the first day of class, the quality and extent of learning appear to be improved (Colvard et al., 2018, p. 273).

In other words, having access to course materials from the beginning of a course will improve student success.

A study by Fischer, Hilton, Robinson, and Wiley (2015) points out that “students in courses using OER enrolled in a significantly higher number of credits in the next semester” (p. 169). This may be a result of students having more money to enroll in other courses (in a system where student tuition is based on the number of credits taken). But the same study discovered that students in OER courses had higher course completion rates, which the authors attributed to the fact that students had “access to all the course materials from the very first day of class because they were openly licensed” (Fischer et al., p. 169). In reviewing 16 studies on the impacts and perceptions of OER, Hilton, Gaudet, Clark, and Robinson (2013) discovered only one where there was not a strong correlation between using an open textbook and changes in student learning.

Less front of mind but no less important is the impact that OER can have on instructors. Employing, adapting, or creating OER from scratch leads to more engagement with the course material than might be the case with closed prepackaged systems. Instructors can develop expertise and knowledge in related and new areas. Moreover, Plotkin (2010) points out that the transfer of teaching methods and insights that comes with involvement in OER leads to the transfer of high-impact teaching methods.

Institutional factors: OER can help institutions raise their profile on the educational landscape

Ontario’s colleges and universities are public institutions established to provide a public good—higher education—and as such are a public good themselves. Higher education is in the public interest; equipping a society’s members with the tools and knowledge to contribute to and improve that society socially and economically is its highest goal. As the Texas Higher Education Coordinating Board (2014) points out, for public institutions in their jurisdiction “that have deep histories of community outreach, incentivizing the development of OER materials by their faculty fits with their historic mission of making learning and knowledge available to everyone, including those learners who are outside of their campus communities” (p. 18). The same could be said about Ontario’s colleges and universities.

Government funding agencies such as the Social Sciences and Humanities Research Council of Canada (SSHRC) and the Natural Sciences and Engineering Research Council of Canada (NSERC) recognize that the research funding they award is provided from public coffers and thus in the public interest. As a result, they have instituted requirements to ensure that publicly funded inquiry be accessible to the public. While open access to research has been criticized in some quarters, the notion of open access to research findings is generally accepted, and institutions have acknowledged their responsibility to facilitate that access by establishing repositories and library services that provide the access required. OER/P align well with the open access to research initiatives; both schemes remove barriers to knowledge. The teaching of a society’s students is in the public interest; barrier-free access to those resources acknowledges that they are a public good as well.

Institutions that promote open access to research but hinder open access to teaching resources are at risk of contradicting themselves. But institutions that promote openness as a value, in order to demonstrate their contribution to the public interest of their society, will enhance their image and role within that society. This can be especially important in an era when higher education is under increased scrutiny and calls for accountability are frequent.

Social factors

OER also form part of the strategy to increase access to higher education for students from traditionally disadvantaged backgrounds or communities. In Ontario there is interest in improving access to education for groups who may face economic or social barriers: First Nations communities, recent immigrants, economically disadvantaged families. In short, OER are seen as supporting efforts to improve equity in higher education.

Many advocates of OER/P extol its social justice virtues. By proposing a different definition of open education, Lambert (2018) sums up the hopes of those who see OER/P as contributing to a more just society:

Open Education is the development of free digitally enabled learning materials and experiences primarily by and for the benefit and empowerment of non-privileged learners who may be under-represented in education systems or marginalised in their global context. Success of social justice aligned programs can be measured not by any particular technical feature or format, but instead by the extent to which they enact redistributive justice, recognitive justice and/or representational justice (p. 239).

Lambert (2018) further notes that “the inclusion of the phrase “by and for... non-privileged learners” maintains the original intention of the 2002 OER definition regarding active participation by developing countries and the marginalized—rather than neo-colonial practices of the Global North doing things to and for those they consider disadvantaged” (p. 239).

Obstacles to Open Education

Despite the benefits that come with open educational resources and practices (OER/P), there is a reticence on the part of educators, especially faculty members and instructors, to become more involved in the creation and/or adoption of OER. Five general factors contribute to this situation.

Lack of professional recognition

The largest barrier to participation in OEP is the lack of professional recognition. Tenured and tenure-track faculty members who evince interest in becoming involved in OEP worry about the amount of time needed to do it properly (see below for more on this issue). Those concerns are compounded if the faculty member thinks that the time and effort expended on OEP will not be recognized in the normal career progression processes, namely tenure and promotion. Though research and teaching are presented as equal pillars of a university faculty member’s obligations,

the general sense at many (but by no means all) institutions is that to advance, one is well advised to concentrate on research and scholarship; time spent on teaching should not be allowed to take away from or impede research efforts. In Ontario's colleges, with their greater emphasis on teaching, this is less of an issue, but by no means a non-issue. Teaching is already the poor cousin to research in tenure and promotion processes; adopting teaching practices that are unfamiliar to tenure and promotion committees only increases the sense of risk associated with becoming involved in OER.

The literature on the lack of professional recognition as a barrier to OER adoption is extensive. Here are some of the most important findings:

- Professional considerations were the second-most frequently cited barrier to the adoption of OER by Ontario faculty in a 2017 Ontario Council of University Libraries (OCUL) survey. Among the considerations were the lack of recognition of OER work in tenure and promotion practices as well as less recognition for textbooks as publications, especially for pre-tenure faculty (OCUL, 2017).
- Allen and Shockey (2014) found “another significant area of opportunity for framework policies is in removing barriers. In forums where public policy influences the tenure and promotion process, incorporating OER could remove a significant disincentive to publishing openly rather than through proprietary outlets” (p. 9).
- Corral and Pinfield (2014) published findings of a study that suggested institutions would “gain additional advantage through integrated (not separate) policies that exploit the convergence of open domains and recognize general common benefits, while observing particular domain-specific limits (e.g., adjusting academic reward systems to encourage behavior that will increase openness in both research and teaching)” (p. 306).
- While it is true that research and teaching are valued differently in review processes, it is important to note that this varies by type of institution. In their survey of over 2,500 Florida higher-education faculty and staff, Florida Virtual Campus (2012) noted that universities tend to emphasize research publications in their tenure and promotion regulations while colleges do not, with further variations in individual universities, colleges, and even departments within the same institution. They also drew attention to the pressure experienced by faculty to author publications in a “publish-or-perish” environment that, along with the lack of recognition for creating and adapting OER in review processes, poses another barrier to their adoption.
- In a recent article on the rise in OER adoption among faculty members, David Wiley noted that both awareness and adoption of OER are moving faster at institutions with teaching-centred tenure and promotion regulations (McKenzie, 2017).
- Plotkin (2010) has noted:
 - The OER movement will not reach the critical mass required to achieve its full potential without increased support from existing educational institutions. ... Incentives that encourage faculty to develop and share OER adaptations would also be useful. That may include providing faculty release time for their production, positive consideration of these activities during tenure review and promotion processes, and the cultivation

of institutional cultures that elevate the professional stature of contributors to the OER movement (p. 18).

- A survey of faculty at nine member institutions of the Open Courseware Consortium and Yale University found that tenured faculty had a different outlook than non-tenured faculty regarding the individual benefits of participating in OpenCourseWare (OCW) (Bilges, 2013). Specifically, tenured faculty showed a more negative attitude toward OCW compared to non-tenured faculty, which “makes the need for incentives for participation more important” (p. iii).
- The findings in the literature were reinforced by the recommendations of the informants; most of them advocated the inclusion of OER/P in tenure and promotion decisions in order to give faculty members a convincing rationale for engaging with OER.

Lack of resources (time and/or money)

One of the benefits of OER/P is the increased engagement of the instructor in the act of teaching; one of the drawbacks is that the time available for such endeavours isn't plentiful thanks to the pressures of research and publishing. For OER creation, this shortage of time is compounded by a shortage of resources that would provide the necessary time (e.g., teaching buyouts) or necessary material resources related to online development and publication costs. In a survey by the Ontario Council of University Libraries (OCUL, 2017), lack of time to create, maintain, and evaluate OER was listed most frequently by faculty as a barrier to OER adoption. The majority of U.S. faculty continually report that the most serious issue facing wider adoption of OER continues to be the effort needed to find and evaluate suitable material. Seaman and Seaman (2017) found that 47% of all faculty report that “there are not enough resources for my subject,” (p. 29), and 50% find that it is “too hard to find what I need” (p. 29). They add that “these rates exceed those of any other potential barrier ... This has been the top issue for each of the three years the question has been asked” (p. 29).

Seaman and Seaman (2017) identified in the same report an issue connected to lack of resources, namely fears that OER will not be sustainable; the third-most cited barrier to adoption is the concern about the long-term viability of OER, with faculty specifically mentioning “the lack of a financial incentive as reason to think that there will not be regular updates” (p. 30).

Lack of clarity on intellectual property rights for teaching materials and resources

In general, clarity of ownership and use of teaching materials can be hard to achieve. This might be especially so in the Ontario context.

For college instructors in Ontario, there is a great deal of uncertainty about the rights of instructors to put the teaching materials they develop into an open context. Colleges have intellectual property (IP) policies that generally state that work completed as part of the duties for which the instructor was hired by the college belong to the college. The difficulty, however, lies in some of the finer details of what constitutes such work. Moreover, instructors feel extremely limited by the lack of control over the fruits of their labour. Issues of the further sale

of instructor-created course materials by institutions to third parties (such as companies that provide educational services for international students or those seeking to upgrade their credentials, or comprehensive learning management systems like DigitalEd) further complicate the matter. There may also be a disconnect between enunciated IP policies (that clearly state the institution's interest) and the actual and consistent execution, or lack thereof, of those policies. All of this is further complicated by the 2017 collective agreement between Colleges Ontario and the Ontario Public Service Employees Union (OPSEU) specifying that discussions about IP would begin in 2018. A task force was created to investigate this issue but was later disbanded after the change in government. Until an agreement on IP between the colleges and OPSEU is reached, it is likely that a cloud of uncertainty will hang over this issue at the college level.

At the university level in Ontario, the question of IP and teaching materials will be governed by each university's policies and practices. These vary across the province. The University of Waterloo and Ontario Tech University grant IP ownership to the creators, with both institutions reserving the right to use the materials for internal teaching purposes, but Ontario Tech goes a step further and claims co-ownership of any teaching materials that have been developed in cooperation with non-academic employees (e.g., personnel in a teaching centre); the University of Waterloo claims only a share in revenue generated if material support from the university (e.g., space, equipment, teaching release) played a role in the development of the IP.

At both colleges and universities, a distinction is often made between "materials required for course management and administration, such as course outlines, final exams and laboratory manuals," and "more detailed teaching materials, such as course notes" (University of Waterloo Policy, 2000); the copyright for the former would rest with the institution. Waterloo's policy was last revised in 2000, well before the establishment of open education and Creative Commons licensing, so it does not reflect the newer realities in the digital era. As such these policies don't have any language regarding OER, and while they prohibit the creators/copyright holders from exercising their rights to license the materials in an open fashion (e.g., with a Creative Commons license), they make distinctions between types of teaching materials, in effect limiting the creator's ownership of those materials.

Lack of quality

There is a persistent notion that OER lack the quality of more traditional commercial resources. In her study of awareness about OER in Ontario, Hayman (2018) points out that in the written comments provided by anonymous survey respondents, the second-most predominant concern was that OER would not be of high enough quality. In the Seaman and Seaman (2017) survey of American educators, the fourth-most cited barrier to the adoption of OER are quality concerns, with 28% of faculty fearing they are "not high-quality" (p. 30). The Ontario Council of University Libraries conducted a survey in 2017 showing quality concerns for OER were frequently cited among faculty as a barrier to OER adoption, including the notion that commercial publications are perceived to be better quality and more current (OCUL, 2017, p. 32). The Texas Higher Education Coordinating Board (2014) notes that:

Textbook authors are subject matter experts first and authors second... In addition to careful copyediting, publishing houses employ teams of internal reviewers who assure that all of the material in the text is clear and accurate. These services are often missing from the publication of OER materials, in part because they are being provided free of charge. The result is that not only is it more difficult for faculty to develop OER materials, but it may also be more difficult for faculty to find and adopt quality materials for use in their classes (p. 19).

Interestingly, a survey of 78 faculty in B.C. found that educators who had previously adopted OER rated their quality as significantly higher than those who had not, raising the question of how awareness of and familiarity with the materials play a role in their evaluation (Jhangiani, Pitt, Hendricks, Key & Lalonde, 2016).

A related issue is the lack of availability of OER in an instructor's discipline or sub-discipline. According to Hayman (2018), this is a significant barrier for Ontario educators in taking up OER, similar to the findings of Seaman and Seaman (2017) that the time needed to find suitable resources is a barrier.

Finally, the perceived lack of quality also makes educators reluctant to place their materials in an open space where it, too, might be perceived as poor. In a report on the adoption of OER at McGill University (Hocevar, 2017), the fear of scrutiny was found to pose a common barrier to the adoption of OER among faculty. A few key concerns were expressed: "Will my work be judged? Who will see my work and am I comfortable sharing this work? What if someone else alters my work in a manner that doesn't reflect me?" (p. 29).

Lack of a cohesive campus approach

On many campuses, those wishing to pursue OEP are stymied by lack of a comprehensive institutional approach to open education. These champions (interested instructors, teaching support professionals, librarians, and the like) may exist in different pockets of a campus, but without an overall institutional vision, their impact on the teaching and learning culture of the institution will be limited. The amount of the champions' involvement in OEP will depend on a combination of the administrative support in their own area, their ability to take on work additional to regular activities and responsibilities, and their interest in networking and supporting each other's efforts.

Very few higher education institutions endorse OER/P in a high-profile manner. Without this kind of endorsement, which can take the form of policies (e.g., recognizing OEP in tenure and promotion), initiatives (e.g., funding course releases for OER development), and vision (e.g., advocating OER/P in academic and strategic plans), OER/P has difficulty gaining widespread traction.

Summary: Benefits and Obstacles

- While the cost savings for students are a primary source of educator interest in them, it's the ability of those costs to undermine student success and access to learning that provide more convincing arguments in support of OER.
- Evolving publishing practices and instructor reliance on prepackaged online assessment systems threaten to lock students into commercial products to a greater extent than textbooks have ever been capable of.
- Despite the substantial benefits accruing to both students and teachers through OER/P, the lack of professional recognition for engaging in OER/P is a major barrier for participation in OER adoption and development by tenured/tenure-stream faculty members.
- Coordinated institutional efforts would improve uptake of OER/P, allay concerns about sustainability, and provide increased incentive for faculty participation.
- Intellectual property rights to educational materials must be clearly delineated.

Institutional Policy

Several institutions, in Canada and North America, have different policies with respect to OER/P that shape strategic planning, tenure and promotion, faculty development programs, grants, textbook costs, and institutional culture more broadly.

Existing institutional policies

The **University of British Columbia** is considered a leader in higher education teaching innovation. UBC's most significant contribution to the development of OER/P has been the inclusion of OER/P in its tenure and promotion criteria.

UBC has two types of tenured/tenure-track faculty: the professoriate stream and the educational leadership stream (or, to use more common though less nuanced terms, research faculty and teaching faculty). In the university's *Guide to Reappointment, Promotion and Tenure Procedures at UBC* (2018a), one criterion for evidence of educational leadership (and therefore applying to teaching-stream faculty) is "contributions to the practice and theory of teaching and learning literature, including publications in peer-reviewed and professional journals, conference publications, book chapters, textbooks and open education repositories/resources" (p. 16). The recent addition of "open education repositories/resources," the result of pressure exerted by UBC's Alma Mater Society (student union) on the university to reduce the cost of course materials, gives OER/P instant credibility among faculty members at the university. And although the criterion is explicitly for teaching-stream faculty, its very presence in a tenure and promotion document is a rarity that is held up as the gold standard for OER/P policy. As Nick Baker from the University of Windsor points out in a recent webinar, tenure and promotion are the "currency of the professoriate in universities": if OER/P is affirmed there, questions about its value will diminish (eCampusOntario, 2018).

The current UBC strategic plan, *Shaping UBC's Next Century* (UBC, 2018b), provides additional institutional support for OER/P. That document underscores the financial argument for OER, while reiterating a commitment to the sustainability of the OER initiatives at UBC by means of the appointment and tenure procedures as well a commitment to funding their development and expansion.

Kwantlen Polytechnic University (KPU) in Surrey, BC, is another Canadian leader in OER/P, and its initiatives have centred on the development of a culture of OER. One of the university's academic goals, as stated in its 2018 academic plan (KPU, 2014), is "to offer exceptional learning environments attuned to learners" (p. 8). It commits to doing this, in part, by establishing:

KPU Open Studies as an innovative unit where learners can undertake competency-based degree completion by building on their previous formal, informal and experiential learning; by designing a personalized degree plan within broad criteria; and accessing a wide range of online and open educational resources and courses as they study (p. 9).

The university offers over 300 courses using OER, and since 2017 it has launched three Zed Cred programs: The Adult Education Diploma, the Certificate in Arts, and the Associate Arts Degree in General Studies. These programs are up to two years in duration and have zero required textbook costs. The university estimates that since starting the Zed Cred programs, students have saved \$1.8 million.

Kwantlen's approach to supporting OER/P is comprehensive, with faculty development programs, learning networks, and open educational research grants. To put a spotlight on the presence of OER on campus, any course with zero textbook costs is highlighted in the schedule of classes as shown in Figure 1.

<input type="checkbox"/>	PSYC 1100 S10	20001 Introduction to Psychology: Basic Processes	3	Surrey	Rajiv Jhangiani	Waitlist	35	35	0	35
<ul style="list-style-type: none"> ◆ Class : May 06, 2019 to Aug 03, 2019 — Wed @ 10:00 - 12:50 in room Surrey, Fir 3414 ◆ Final exam : Aug 07, 2019 to Aug 07, 2019 — Wed @ 08:30 - 11:30 in room Surrey, Fir 3414 <p>Important: This course section has ZERO TEXTBOOK COSTS. For information about programs that you can complete with zero required textbook costs, visit ZedCred.</p>										
<input type="checkbox"/>	PSYC 1100 S11	20002 Introduction to Psychology: Basic Processes	3	Surrey	Robert McDonald	Waitlist	35	34	1	35
<ul style="list-style-type: none"> ◆ Class : May 06, 2019 to Aug 03, 2019 — Thu @ 13:00 - 15:50 in room Surrey, Fir 240 ◆ Final exam : Aug 15, 2019 to Aug 15, 2019 — Thu @ 12:00 - 15:00 in room Surrey, Fir 240 										
<input type="checkbox"/>	PSYC 1100 S12	20703 Introduction to Psychology: Basic Processes	3	Surrey	Rajiv Jhangiani	Waitlist	35	35	0	35
<ul style="list-style-type: none"> ◆ Class : May 06, 2019 to Aug 03, 2019 — Mon @ 10:00 - 12:50 in room Surrey Main 2820 ◆ Final exam : Aug 12, 2019 to Aug 12, 2019 — Mon @ 08:30 - 11:30 in room Surrey Main 2820 <p>Important: This course section has ZERO TEXTBOOK COSTS. For information about programs that you can complete with zero required textbook costs, visit ZedCred.</p>										

Figure 1. Excerpt from class schedule at Kwantlen Polytechnic University. Retrieved from https://bweb.kpu.ca/pls/prodss/bwysched.p_select_term?wsea_code=ACAD

Another institution that has made comprehensive steps toward establishing a strong foothold in OER/P is the **Southern Alberta Institute of Technology (SAIT)** in Calgary. Its 2017-2020 education

plan, *Big Thinking, Applied* (SAIT, 2017), commits to implementing a “faculty development and competency model” that, among other things, “supports faculty in adopting, adapting and creating open educational resources that increase access to relevant, flexible learning content” (p. 17).

Evidence that the education plan is having an effect can be found in a policy, Procedure AC.2.21.1, instituted by SAIT’s Board of Governors in 2018 and which forms the basis of the institution’s plans for OER (SAIT, 2018). The policy states that “an essential foundation of quality education is sharing knowledge and ideas. SAIT therefore encourages its students, instructors, subject-matter experts and instructional designers to make use of Open Educational Resources” (p. 3). Though the policy outlines some resources on campus that can assist instructors with OER development, it does not mandate any action on the part of its employees. Of interest, however, are the reasons given in support of OER: they increase student success by making course materials more affordable; they “improve teaching efficiency and effectiveness, through the ability to focus, analyze, augment and evolve course materials directly aligned to program and course learning outcomes” (p. 3); they increase innovation; and they “enhance SAIT’s reputation” (p. 3).

Tidewater Community College in Norfolk, Virginia, takes pride in being the first American college to offer a “textbook-free Z degree.” The program launched in 2013 in partnership with Lumen Learning and offers students a two-year Associate of Science in Business Administration degree with no required textbook costs.

As the degree was developed, so was a policy that defined institutional support for this pioneering initiative. Over time, the policy has become much more comprehensive in order to support the more than 100 faculty involved in the program. The policy outlines quality standards, licensing guidelines, and other housekeeping matters. It also makes the promise that the college will offer professional development, called OER Pathways, that is required of any faculty members wishing to teach a course with a Z course designation. Finally, the policy is notable for the strong case it makes for OER: open educational resources “improve student success through increased access and affordability, and improve teaching efficiency and effectiveness through the ability to focus, analyze, augment, and evolve course materials directly aligned to course learning outcomes” (Tidewater Community College, 2016, pp. 1-2).

Policy at other institutions

Below is a brief summary of other approaches to policy taken by various institutions.

- The **State University of New York (SUNY)** provides support and advice through its OER services unit across 64 campuses. A leader in the development of OER, SUNY’s policy process is decentralized, so each campus can establish its own guidelines and procedures. Only a handful of these campuses have gone the official governance route to establish OER policy, and the policies themselves are of an endorsement nature.
- The **University of Hawai’i** has instituted “textbook cost zero marking” in its course registration system whereby instructors in any course or section can indicate that the cost

of their course materials is \$0 (Meinke, 2018). (Informal arrangements to indicate free course resources had been in place previously.) A survey conducted by Tillinghast (2017) discovered that the cost of course materials might or would affect the decision of just over half of the university's students surveyed to stay enrolled. In commenting that these findings reflected national trends, the University of Hawai'i's OER office publicity release was blunt: "students make poor academic decisions based on the cost of textbooks."

- **Kirkwood Community College** in Cedar Rapids, Iowa, has taken what can best be described as a semi-formal approach. Interested faculty and staff from that institution drafted a policy that received approval from senior administration. The policy voices support for OER adoption and indicates the measures in place—employees versed in OER/P, faculty workshops, an OER development stipend, and an OER website.
- The **University of Windsor** has gone the furthest with regard to OER/P of all Ontario universities. Three developments there are worth noting:
 1. The university's tenure and promotion guidelines allow departments some freedom to establish department-level guidelines, allowing at least one unit at the university to include the use and development of open educational resources.
 2. The university's Senate passed a motion in 2016 advocating the use of free and open course materials in order to reduce costs to students.
 3. The university has established an Office of Open Learning that supports the development and use of OER/P (uwindsor.ca/openlearning/).

Other Canadian institutions—such as Athabasca University, Cambrian College, Queen's University, Ryerson University, the University of Lethbridge, and the University of Saskatchewan, which is by no means an exhaustive list—are active in the OER/P space, though often without formal, governance-driven policies in place to guide their work. The activities tend to be a variation on a similar theme: one or more members of the institution—perhaps people from the library, the teaching centre, or an instructor—begin working informally on OER/P projects. These arrangements can then over time take on a more formal structure (e.g., with the infusion of grants from the administration to support course development, or the adoption by the teaching centre of OER/P as a preferred practice).

Rationale for a Policy Model

In her blog post "Building an OER (open educational resources) policy," Glasgow Caledonian University librarian Marion Kelt starts on an ironically cheery note: "Got a few years to fill? Why not try to develop and implement an OER policy at your institution?" (Kelt, 2017). Change at an institutional level can seem at times to be impossible. What makes pursuing institutional OER/P policy worthwhile?

By adopting high-level open education policies and guidelines, institutions signal their commitment to OER/P by making open education integral to their mission. Of course, policies

don't exist in a vacuum; they are borne out of a need to establish and codify an institution's procedures on particular matters. This has two implications for anyone hoping to see OER/P policy established at their institution. These policies must be:

1. Embedded within a broader academic vision for the institution
2. Seen as just one part of a larger strategy to foster OER/P

For many, institutional policy is interpreted as a top-down approach; policy is decided at the highest levels of an institution's governance structure and handed down to the institution's members. Given the collaborative and community-oriented nature of OEP, policy-making is therefore viewed with some suspicion. It feels too authoritarian, and anyone who has been associated with higher education knows that administrators who attempt to enforce unilateral decisions are quite often met with a great deal of resistance and pushback. In recommending a policy approach to cultivating OER/P in Ontario, this report recognizes that many have a natural inclination toward a more grassroots approach.

There is, however, plenty of reason to advocate the use of policy to further those grassroots goals and initiatives. Policies have the ability to reflect and support the culture of their institutions by establishing and codifying procedures that will sustain particular visions. Policy can be a grassroots tool as much as an administrative one, especially when we recognize that policy is often established in response to and part of an ongoing dialogue on topics of institutional importance. Opposition to policy is unnecessary when it is the result of a consultative process, and that consultation can often be instigated and maintained from the bottom up.

More to the point, institutional policy can be extremely effective in motivating a campus community to act on particular initiatives, especially when there is already support for those initiatives. The example of Canada's higher education institutions implementing various policies and initiatives in response to the Truth and Reconciliation Commission's Calls to Action underscores the power of policy. Other top-level policies, such as strategic and academic plans, are also useful in galvanizing action on particular issues, particularly if they are the result of broad consultations. Policy-making, in other words, is not a monologue but a conversation, and therefore does not need to be viewed as a high-handed or doctrinaire.

For this policy-as-conversation view to be enacted, however, the policies must reflect the institutional community. It is for this reason that, in addition to policy proposals, this report also recommends some approaches to *processes* for envisioning OER/P goals and *support structures* needed to sustain that vision.

In all of these recommendations, the report's authors are mindful of the adage "think globally, act locally." Each institution possesses its own culture, and what works on one campus may not work on another. The policy recommendations, broken down into constituent parts, therefore reflect the *global* aspirations of OER/P policy that institutions will want to adapt and tweak according to *local* conditions, and they have been kept brief so that they might function as a framework on which Ontario's colleges and universities can build.

In mapping out the policy model below, the report's authors relied on the information contained in some of the policies discussed in this report. Additional assistance was obtained from the OER Policy Toolkit (Coolidge & DeMarte, 2016), and BCcampus's *Working Group Guide* (Wright & Lambert, 2019).

Although this model is mapped out as a self-contained OER/P policy, many institutions will not wish or be able to have a standalone policy. It has, therefore, been constructed in modular fashion so that those portions of interest can be adopted and adapted according to local need and context.

Policy Model for Ontario's Colleges and Universities

Strategic/academic plan

This institution supports the use of open educational resources (OER). OER improve student success through increased access and affordability while at the same time improving teaching effectiveness through the ability to focus and align course materials to learning outcomes. This institution is committed to providing instructors with material and organizational support in their use of OER to achieve these outcomes.

Rationale: *Good strategic plans can serve as waymarkers for the institution. By developing a strategic vision for OER/P, an institution identifies the values of OER/P that it wishes to foster and provides leadership that enables all stakeholders to prioritize OER/P and contribute to the realization of that vision. The OER portion of such a plan can provide the impetus for others to inform themselves about OER/P and see if there's a way to get involved. The wording for such plans will depend on the goals an institution has set for itself in the OER/P space, but that wording can follow any number of models previously mentioned in this report. The above wording, adapted from the Tidewater (2016) policy's preamble, is just one example.*

If the institution has a policy on open access to research, the OER/P wording can be aligned with it, providing a strong basis for the institution to bundle its open initiatives together.

Tenure and promotion

Tenure and promotion guidelines shall include recognition for engagement with OER and OEP.

Rationale: *Career considerations are the leading obstacle hindering faculty member participation in OEP.*

Intellectual property rights

The institution encourages and permits instructors to license their course materials with Creative Commons licenses.

Rationale: *The intent here is to ensure that instructors have ownership of their course materials and are able to license them with Creative Commons so that they may be used openly. Given the complicated situation regarding intellectual property rights at Ontario’s colleges and universities, the wording for this section of policy is purposely vague; each institution will have to work out this aspect of its OER/P policy according to its local context.*

Online assessment packages

Guidelines will be established for the use of ancillary materials, such as online assessment packages that students must purchase and use in order to receive part of their course grade. These guidelines should aim for transparency about the provenance of the material and the instructor’s/university’s own stake in the material. Any such materials should allow students persistent access and ownership of their work after the term has ended.

Rationale: *Under Ontario’s current government led by Premier Doug Ford, increased attention is being paid to the ancillary costs of higher education. Colleges and universities can demonstrate a willingness to protect student interests by ensuring that course material costs are reasonable and have the learning of the student top of mind. OER fit nicely into such guidelines.*

Textbooks and required ancillary materials

Textbook and ancillary material costs will be included in the student course registration system, and/or the course registration system will indicate which courses have zero textbook costs.

Rationale: *This provides greater transparency at the moment a student chooses their courses, allows them to budget more wisely, and provides an opening for campus conversations about the benefits of OER.*

Steering committee

A steering or advisory committee with representation from OER/P will be established on campus. The committee will be charged with specific responsibilities, and will establish working groups to accomplish its tasks.

Rationale: *One of the key elements of successful policy interventions, and an approach advocated by many informants to this report, has been the establishment of a committee that includes those stakeholders who will play a role in deepening the institution’s involvement with OER/P. Such a committee needs to be representative of all stakeholders, which makes for a large committee; therefore, working groups with specific tasks should help the committee in meeting its objectives.*

Representation could be drawn from the following constituencies:

- Top institutional executive with direct oversight of teaching and learning (this might be

the academic vice-president, associate vice-president, or equivalent)

- Faculty
- Faculty association/union
- Students
- Student association/union
- Teaching and learning centres
- Student success office
- Library
- Registrar services
- Information technology services
- Learning management systems staff
- Campus bookstore
- Copyright services
- Open access research office
- Intellectual property office
- Media services/public affairs
- Accessibility services
- OER coordinator

Responsibilities:

- Overseeing the institution's strategic vision for OER/P: A strategic vision identifies the values of OER/P that an institution wishes to foster, and provides leadership enabling all stakeholders to identify how they can support OER/P and contribute to the realization of that vision.
- Formulating input for the institution's strategic and/or academic plans, or other planning processes.
- Conducting a regular environmental scan of OER/P activity at the institution that measures progress on the OER/P front, determines goals, and strategizes pathways toward these goals. This would include the collection of pertinent statistical data.
- Developing a communications plan that provides annual reports to the institution's senior executive team and the broader campus community on institutional progress in OER/P. Regular communication can spark interest in OER/P and improves the overall profile of OER/P on the campus.
- Establishing a framework for celebrating and publicly recognizing OER/P successes on the campus.

OER coordinator

This institution will create the position of OER coordinator to oversee the institution's OER/P activities.

Rationale: *Campus-wide efforts such as the creation of a culture of OER/P need a champion and point person with the expertise and knowledge to facilitate and support the institution's OER*

activities. One person would probably not be enough to cover all the bases, but it's the place to start. If funds are available at a given institution, this portion of the policy framework could be expanded to scale.

Responsibilities:

- Promote and facilitate engagement in OER
- Act as the OER resource person on campus
- Provide an introductory training program to all faculty members wishing to move a course into the open (similar to the Tidewater Pathways model)
- Organize and/or facilitate professional learning opportunities for instructors and staff on all aspects of OER/P
- Work with the steering committee to develop and maintain institutional OER/P strategy
- Function as a liaison with eCampusOntario
- Keep abreast of developments in OER/P

Funding

The institution is committed to sustainable OER/P. To that end, funding in the form of grants and teaching releases to assist in OER creation, adoption, and adaptation will be provided. In addition, funding for professional learning opportunities such as conference attendance, copyright training, and the like will be available.

Rationale: *Developing quality, sustainable OER takes time, resources, and knowledge. This policy recommendation addresses all three issues.*

Contract instructors

The institution will extend support to contract and sessional instructors who wish to move their courses into the open.

Rationale: *Contract instructors are responsible for a vast number of courses in Ontario's colleges and universities. They will require support similar to what regular faculty receive to move courses into the open, and this needs to be recognized in policy. (None of the policies studied for this report explicitly mention contract instructors.)*

Repositories

The institution will develop and maintain OER repositories and will provide support for placing OER work created at the institution in repositories such as the eCampusOntario Open Library.

Rationale: *For the work to be open, it has to be accessible in both local and more widely networked repositories. This contributes to its sustainability and increases the chances that it will attract the attention of others.*

Environmental Scan Exercise: A Diagnostic Tool

One aspect of the policy model above is a proposal that institutions conduct an environmental scan to gain an overview of the place of OER/P in their affairs. Such a scan not only allows an institution to assess where it is, where it wants to go, and how it's going to get there, it also gives the institution the opportunity to reflect on its goals for OER/P generally.

Unlike the inventory suggested by Wright and Lambert (2019) in the *Working Group Guide*, the environmental scan envisioned here helps institutions assess the depth of their OER/P involvement while at the same time measuring the institutional support available for that involvement. The environmental scan can be a first step toward establishing all other aspects of the policy framework outlined in this report. Figure 2 provides a simplified rendering of how one can employ the environmental scan.

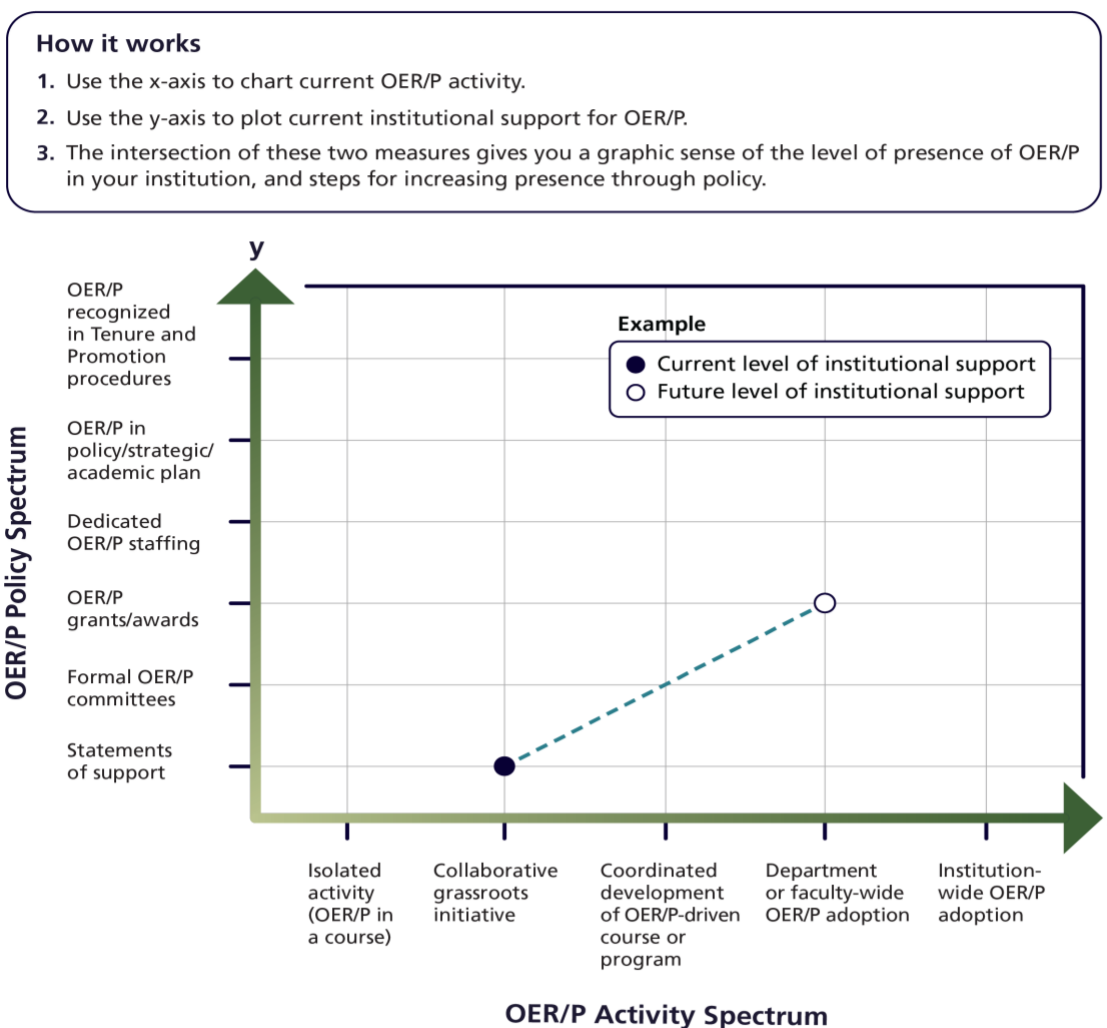


Figure 2: Diagnostic tool for open education policy scan. Credit: Skidmore, J. (2019). Open education

environmental scan: An institutional diagnostic tool. Retrieved from <https://www.ecampusontario.ca/publications-reports/>. CC-BY-SA

The Role of eCampusOntario

eCampusOntario can play a central role in the development of OER/P policy at Ontario's colleges and universities. Its wealth of expertise, its knowledge of the open environment, its connections with all of Ontario's colleges and universities, and its library of resources can be of assistance to any institution pursuing policy strategies.

Another role for eCampusOntario would be to develop a workshop to assist institutions in getting their policy framework activities off the ground. The workshop could make use of various tools, such as the environmental scan above, the Coolidge and DeMarte (2016) OER policy development tool, and the Wright and Lambert (2019) *Working Group Guide*, to facilitate a workshop that brings the global notion of OER to the local context of the institution.

Conclusion

The report has discussed the following issues and/or draws the following conclusions:

- Some of the major obstacles to open educational practice, such as lack of professional recognition, can only be properly addressed by institutional policy.
- Given the rapidly changing textbook publishing industry, strong institutional policy supports for open educational resources will protect students and instructors from publishing practices that do not serve the best interests of teaching and learning.
- OER/P policy development should be guided by a “think globally, act locally” approach.
- Policy development is not solely a top-down decision-making process, but rather a dialogue that grassroots members of institutions can influence and drive.
- eCampusOntario can play a vital role facilitating the development of policy alternatives at Ontario's colleges and universities.
- An open education diagnostic tool can help institutions conduct an environmental scan of the place of OER/P in the institution's teaching and learning ecosystem.

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Informants

The following stakeholders in OER/P provided background information on the state of OER policy at North American colleges and universities. Potential informants were selected as a result of the literature review and scan of institutional OEP/R initiatives conducted in late 2018/early 2019. Interviews were conducted in January and February 2019 via an online communications platform. Normal ethical practices—notably the right of informants to cancel participation at any time and the guarantee of anonymity—were observed.

1. Director of open educational teaching and learning at an American state university
2. Senior manager at a Canadian open education consortium
3. Vice-president at an American association for higher education
4. President of a campus in an American state university system
5. Educational development specialist at a Canadian university

6. E-learning librarian at a Canadian technical college
7. Educational developer at a Canadian university
8. Vice-president of a provincial university student association
9. Librarian at an American community college
10. Ontario college librarian
11. Ontario university librarian
12. Canadian university professor
13. Vice-president of an Ontario university students' association
14. Vice President for teaching and learning at a Canadian university
15. Course materials manager at an Ontario university bookstore
16. Canadian university associate dean
17. Open education strategist at a Canadian university

Recommendations from Informants

Most of the informants provided a number of worthwhile suggestions, many of which have been incorporated into this report. Here is a brief summary of their ideas.

Director of open educational teaching and learning at an American state university:

- Have a flexible definition of OER/an OER course across institutions that will allow each institution to fit it to its needs (following the example of SUNY with its definition of an OER course).
- Establish a good network of OER leadership and support for OER implementation across Ontario campuses (like what SUNY OER Services is providing to the system's institutions).
- Encourage dialogue with and between faculty about OER.
- Ally with important stakeholders, particularly libraries and student governance.

Senior manager at a Canadian open education consortium:

- Evaluate institutional culture (e.g., if an institution has a very strong faculty association union, it's important that that faculty association and union be in the conversation from the beginning).
- Identify the stakeholders involved in drafting an open education policy and come together as an institution to create a policy that would be beneficial for all; not just have one unit lead open policy development.
- Have a good communication plan that is transparent, accessible to everyone at the institution, and has similar language across the stakeholder group to avoid a convoluted message.

Vice-president at an American association for higher education:

- Evaluate institutional culture, particularly with regard to academic freedom, before developing any top-down open education policy.
- Adjust the tenure and promotion process to include engagement with OER as a reward for faculty.
- Develop a policy to encourage new faculty, part-time faculty, or even TAs to use OER (e.g., when teaching general education first- or second-year courses). That policy could even

influence job descriptions (e.g., by requiring instructors to use OER in their courses). But also use permissive language that allows faculty to argue against using OER (e.g., in the case of quality concerns or lack of availability of OER for a specific course).

Educational development specialist at a Canadian university:

- Have faculty OER champions and reward open work to incentivize more faculty to work with OER.
- Establish affirmative language on the use of OER in tenure and promotion procedures instead of just passive acceptance of open education.
- Stay ahead of publisher practices by paying attention to both what publishers say their future direction is going to be and also price trends in textbooks and related materials.
- [On promoting open in strategic plans and other university commitments]: Promote an understanding of copyright licensing (e.g., Creative Commons licensing) among students without necessarily mentioning open explicitly; that then becomes a good opportunity to bring open pedagogy into the conversation.

E-learning librarian at a Canadian technical college:

- Have both faculty and student input when developing policy.
- Conduct surveys on attitudes toward OER to gain local institutional data that can then be used to convince stakeholders.
- Have an OER policy address faculty concerns on the time and effort needed for OER adoption and creation (e.g., through a dollar amount or another kind of support process).
- Establish funding for the work that needs to be done on OER (management, assessment, record keeping, etc.) by either faculty or student stipends.
- Establish funding for the technology surrounding OER (repositories, publishing and production software, etc.).

Educational developer at a Canadian university:

- Collaborate with stakeholders across the institution on open education to have all parties involved.
- Have institutions collaborate with each other (e.g., in the context of Ontario, create a community of practice that meets regularly and where members update each other on their projects).
- Better communicate institutions' needs to the provincial government and lobby for province-wide policies.

Vice-president of a provincial university student association:

- Have student associations make students familiar with OER because they will want these resources if they know about them; this will increase the pressure on universities to increase OER uptake.
- Establish grants or bursaries for faculty interested in open as an incentive to counteract the laborious task of adopting or developing an OER.
- In general, raise the level of awareness and support for those interested in OER with simultaneous support from the provincial government.

Librarian at an American community college:

- Include as many faculty members and stakeholders as possible in the process of implementing open education policies.
- Make the implementation of open education policies an institution-wide process and not a top-down mandatory process.

Ontario college librarian:

- Establish an intellectual property policy at all Ontario colleges.
- After the fall 2017 strike at Ontario's colleges, one recommendation from arbitration was the creation of a task force on issues such as IP and workload. The current government dismantled the task force, but if the information it gathered is available, it would help college faculty in figuring out an IP policy that would support OER.

Ontario university librarian:

- Incentivize rather than mandate; make an effort to shift institutional culture toward embracing OER as opposed to a top-down policy that mandates the use of an OER (the latter would be seen by faculty as an infringement upon academic freedom).
- Coordinate open education efforts across an institution, especially groundwork efforts in faculties.
- Knowing that eCampusOntario is interested in infrastructure, leverage coordinated open education efforts at institutions (e.g., by working with libraries on electronic textbook platforms such as Pressbooks).
- Link open education activity and policy efforts to the open movement in a broader way to avoid detached initiatives and understand that they are all manifestations within the same digital environment.

Canadian university professor:

- Establish specific policies with procedures for implementing OER and open access rather than broad and general OEP policies. Avoid policies on open pedagogy, as this can be interpreted as interfering with academic freedom and could halt initiatives.
- Have institutions take full advantage of eCampusOntario's experienced staff to aid them with incorporating OEP while also partnering with other institutions both in- and outside the province.
- Focus on action first and policy creation second since the usefulness of policies comes only if they support real actions.
- Share OER course material, which can help reduce costs and increase the quality of course content.
- Have any OER policy distinctly specify a common license as a requirement to avoid restrictions that come with different licenses.

Vice-president of an Ontario university students' association:

- Provide greater incentives for faculty and students to use OER.

- Collect information on user experience and success for OER initiatives, especially for the Ontario context.

Course materials manager at an Ontario university bookstore:

- Have institutions continue to align themselves with Ontario's Differentiation Policy Framework for Postsecondary Education to allow for more opportunities for OER.
- As mandated by the Tuition Fee Framework and Ancillary Fee Guidelines for Publicly-Assisted Universities in Ontario, institutions have a responsibility to uphold student interests when assigning third party digital learning resources tied to assessments, and should have clear guidelines or policy regarding the adoption or use of these types of resources.
- Require that courses offer students the option to use born digital learning products.
- Support the creation of online courses, whether open or low cost, both in Ontario and federally.

Canadian university associate dean:

- Align bottom-up energy of faculty members with top-down administrative interest in cost efficiency.
- For department or university-wide OER initiatives, permit institutional ownership of IP to facilitate coordination and implementation.

Open education strategist at a Canadian university:

- Support conversations involving stakeholders, like administration and policy-makers, both from the ground up and from the top down.
- Establish funding for the use, integration, and creation of OER both at the individual (course) level and at a higher level (e.g., Z-degrees).
- Incorporate OER into tenure and promotion procedures.
- Make the cost of course resources publicly available to students to allow them to make an informed decision, and/or make the use of OER by an instructor in a course publicly available (e.g., University of Hawai'i).
- Get all stakeholders together (e.g., through a grassroots working group).