Facilitating Culture Change to Boost Adoption and Creation of Open Educational Resources at the University of North Dakota

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Chapter 13 - Facilitating Culture Change to Boost Adoption and Creation of Open Educational Resources at the University of North Dakota

by Stephanie Walker, University of North Dakota (bio)

Introduction

In 2015, the University of North Dakota (UND) had no institutional program to promote adoption, creation, or utilization of Open Educational Resources (OERs). Few faculty were using, creating, reviewing, or in any way supporting OERs. To our knowledge, just three faculty members had written two open textbooks, and they received no institutional support. The culture of OERs and Open Access was not well known or understood across campus, and no institutions in the North Dakota University System (NDUS, a coalition of 11 public post-secondary institutions in North Dakota) had undertaken widespread promotion or adoption of OERs.

Within two years, however, UND achieved a complete culture shift, with strong support for OERs integrated into the fabric of the university and into its procedures and documents, cross-campus involvement in OERs from every College, and broad financial support. This chapter outlines how we accomplished this and what we learned, and offers suggestions for others who wish to effect similar culture shifts at their institutions.

Introducing OERs at UND

Discussions of OERs had begun on campus by 2015, but the initial climate was extremely resistant. A respected senior faculty member, Dr. Tom Petros, gave an impassioned speech against OERs at the University Senate, calling them incursions on academic freedom. Dr. Petros was under the impression that the Library or senior UND Administration would force OERs on faculty, and require their usage; this has happened at other institutions. But at UND we had no intention of forcing faculty to adopt OERs. We understood how strongly faculty value the freedom to set their own curriculums, and that some consider it a fundamental tenet of academic freedom. With
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Fortunately, we made quick progress. Dr. Tanya Spilovoy, then NDUS Director of Distance Education, addressed the North Dakota State Legislature’s Higher Education Committee, explaining how textbook costs had risen dramatically, why this was a barrier to access to postsecondary education, and how OERs can help. Representative Thomas Beadle of Fargo wrote a bill (HB 1003, January 6, 2015) that allocated $110,000 to NDUS to support OERs; after some costs, this became just over $106,000. In September, 2015, UND hired a new Dean of Library & Information Resources, Stephanie Walker. Provost Tom DiLorenzo gave her a mandate to advocate for OERs, and introduced her to Dr. Thomasine Heitkamp, a longtime faculty member seconded to the Office of the Provost for special projects, including OERs. Dr. Heitkamp and Dean Walker were to co-chair the new UND Open Educational Resources Working Group (OER WG), and began by discussing group membership. Critically, they decided membership should be as broad as possible, and involve all possible stakeholders across campus.

This was the beginning of a coalition-building strategy, which proved to be an essential factor in the development of a strong advocacy program, widespread adoption of OERs, and a complete culture shift. By drawing members from critical groups across campus, we developed a broad support base that included administrators, librarians, instructional designers, distance learning staff, staff from technological and pedagogical support units, faculty members from multiple disciplines, and students. Dr. Heitkamp had been at UND for many years, and knew who might be receptive and supportive of the group. This was vital, as Dean Walker had just arrived in North Dakota after nearly a decade in New York City. Within weeks, the OER WG included:

- Stephanie Walker (Dean of Libraries & Information Resources, co-chair);
- Dr. Thomasine Heitkamp (Faculty Member and Senior Administrator, co-chair);
- Dr. Virginia Clinton (faculty member, Psychology);
- Dr. Ryan Zerr (faculty member, Coordinator of Essential Studies);
- Dr. Dana Harsell (faculty member, College of Business & Public Administration);
- Blake Andert (student, Vice President of Student Government);
- Brandon Beyer (student, President of Student Government);
- Dr. Lori Swinney (Director, Center for Instructional Learning Technologies);
- Lynette Krenelka (Director, Office of Extended Learning);
- Dr. Anne Kelsch (Director, Office of Instructional Development);
- Dara Faul, Kristi Swartz, Jane Sims, Naomi Hanson, and Elizabeth Becker (instructional designers); and

the misinformation circulating, however, it was clear that we had a long road to travel to change the campus climate.
• Megan Carroll and Holly Gabriel (librarians).

The co-chairs threw the doors open wide and didn’t worry about committee size. Large committees can be unwieldy, so we often delegated specific tasks to subcommittees. But overall, we deliberately maximized membership, believing this would lead to deeper campus-wide integration and buy-in. Also, faculty members often prefer to hear about successful teaching initiatives from other faculty—or from students who have taken the courses—rather than from librarians or instructional designers. By encouraging broad membership, we successfully achieved this campus-wide buy-in and broad adoption of OERs; faculty also appreciated hearing from each other and from students regarding their experiences with OERs.

Building an OER Program

In addition to forming a working group, we hosted and/or participated in several activities in order to begin shaping an OER program on campus. In October, 2015, Dr. Spilovoy used funds to develop a two-day OER seminar at Valley City State University for faculty and staff of NDUS institutions. Dean Walker and Dr. Heitkamp attended, with interested UND faculty and with colleagues from UND’s Center for Instructional & Learning Technologies and Office of Extended Learning. One speaker was Dr. Dave Ernst, CIO of the University of Minnesota’s College of Education & Human Development, Director of the Center for Open Education, and Executive Director of the Open Textbook Network. Dr. Ernst made excellent points about the effects of rising textbook costs, including the high percentages of students who don’t take a course because of the textbook’s price or who fail a course because they are unable to afford the textbook. The OER WG invited Dr. Ernst to speak at UND; he accepted, and spoke at an event in January, 2016. It was well advertised, and about 70 faculty and staff attended; Dr. Ernst also allowed us to place his talk on our Vimeo channel for those who couldn’t attend (see https://vimeo.com/153952521 for this seminar).

Dr. Spilovoy also announced a grant program, and sent emails across NDUS asking for proposals to facilitate OER adoption. Dean Walker and Dr. Heitkamp wrote two proposals: one to support the creation of $3,000 stipends for four faculty members (in Psychology, Political Science, Sociology, and Atmospheric Sciences) to adapt their courses to utilize OERs, and another to purchase the rights to and digitize Elwyn Robinson’s History of North Dakota, and make it openly available. The latter is used as a textbook in a UND history course and by local high schools, and is considered the definitive history of North Dakota before 1967. Dr. Robinson was a UND professor and the second State Historian of North Dakota, and UND’s Archives & Special Collections unit is named after him, so it was appropriate for UND to be the institution to make the book openly available. The latter project also garnered additional support when a faculty member mentioned to Dean Walker that the Northern Plains Heritage Foundation had funds for projects promoting local history. Dean Walker approached the Executive Director, and he provided $15,000. UND Libraries also have an Elwyn Robinson fund (Dr. Robinson’s sons are generous donors), and we directed $10,000 from the fund toward the project. This additional buy-in from the Northern Plains Heritage Foundation and the Robinson Fund impressed the grant evaluators. Support from multiple groups helps elevate a project during the evaluation process.

Both proposals were successful, and the OER WG began organizing faculty training workshops. In June, 2016, the OER WG offered a four-afternoon workshop series for faculty who would be adapting their courses to use OERs. The curriculum included, among other topics, brief presentations on:
technological tools, by Instructional Designers;
- copyright and Creative Commons Licensing, by UND’s General Counsel, Jason Jenkins;
- how to find and evaluate reliable OERs, by librarians; and
- retaining author rights.

The workshops included ample time for hands-on work, so faculty would have the advantage of assistance from librarians, instructional designers, technology staff, and staff with legal expertise. Our intent was for faculty to use the summer to adapt their courses and teach them in Fall, 2016. Once faculty attended the workshops, we paid their stipends. Not all faculty were able to attend all workshop days, so we also offered one-on-one assistance. In addition, librarians created online guides (using a product called LibGuides) on OERs, and later added additional guides on Altmetrics, Scholarly Communication, Open Access, and more.

By this time, word was spreading across campus: OERs could help financially struggling students, and funding and other support were available to help interested faculty. The Mathematics Department contacted Dr. Heitkamp and expressed interest in replacing the textbooks and related materials (which cost over $400 if purchased new) for Calculus 1, 2, and 3. Math faculty brought this to their colleagues, and the Department agreed that this cost was unreasonable. Almost 1,000 students/year take Calculus 1, 2, or 3, including online students. Calculus is both a critical requirement for many disciplines, and a “barrier course” that students fail at higher than average rates. UND’s Math Department was determined to help. They committed to developing materials as a department, but needed stipends; they couldn’t entirely donate their time. Dr. Heitkamp convinced the Dean of Arts & Sciences, Dr. Debbie Storrs, and the Director of the Office of Extended Learning, Lynette Krenelka, to contribute $6,000 each for Math faculty stipends. Four Math professors joined our inaugural OER faculty.

With regular communications from the OER WG and faculty at other institutions, such as Dr. Ernst, and with the embrace of OERs by some of their own, faculty attitudes began shifting noticeably, as did the atmosphere at UND. The University Senate Library Committee, for example, endorsed OERs. And after the first group of faculty received stipends, adapted their courses, and implemented OERs, interest grew. We made it clear that no one wanted to force faculty to use OERs; all we asked was that they consider OERs as they would any other resources. We leave all curricular decisions to faculty, and simply offer support if they want to consider adopting OERs. After the first group of faculty implemented their OERs we tallied the savings. When it was close to $1 million, on an investment of $24,000 (not counting the more archival History of North Dakota project), we knew we had something.

Getting the Word Out

Stellar publicity about the program soon began to appear on campus and beyond. The University Senate Library Committee reported on our progress with OERs to the University Senate. Many faculty confessed they had been unaware of the soaring cost of textbooks, or that textbook costs presented a real barrier for many students. Our
Moving Forward with OER Adoptions

Overall, publicity for our program was going strong. But we also needed to keep the adoption of OERs going—and growing—or we’d risk having our success limited to a one-off project. We wanted to change the culture at UND, so that faculty automatically considered OERs when designing courses. And for that, we needed more money. Luckily, there were funds left from the initial $106,000, and in November, 2016, NDUS issued a second call for OER proposals. Dean Walker promoted this on campus, but many faculty said that while they were
interested, they were too busy to write a proposal. Dean Walker asked “If I write a draft, are you willing to edit it as you need, and then let me submit it for you? Are you willing to participate if you get the funds?” The answer to both questions was “Yes.” Dean Walker wrote five proposals, and two proposals were written by others. Five submissions were funded, for courses in English, Business, Art, History, and Mathematics. One was turned down because the ROI was insufficient (too few students took that course), and another because the budget was too high. We were very pleased; we’d not expected this level of success, because UND had received most of the money allocated in the first round. As it turned out, we received the bulk of the money in the second round as well! We were told that our proposals were the clearest, and offered the greatest ROI. We began planning workshops for June, 2017, adapting them based on feedback from past workshops.

We also asked faculty in our inaugural OER group to report back, and in March, 2017, we held another OER event. Instead of a guest speaker, we offered an Open Forum featuring faculty who participated in the inaugural group. It was particularly exciting because they had used a wide range of materials to develop OERs suitable for their courses—everything from government documents to existing open textbooks to interactive tutorials to video and more. Each faculty member had interesting things to report. For example, Prof. Clinton had previously taught Introductory Psychology using a traditional textbook that cost $154. She surveyed her students, switched to an OER the next term, and surveyed the students again. They liked the OER as well as the traditional textbook, except that they said the expensive one had slightly better graphics—but they did not consider that a “deal breaker,” and preferred the OER. Grade distribution was unchanged. Interestingly, Dr. Clinton noticed that far fewer students in the OER-using class dropped the course. She continues to study this, working on articles for publication. She believes the textbook cost was causing students who could not afford it to withdraw. If this is borne out in future, OERs could be a contributing factor in student retention, and help us deal with equity issues for our students. She also noticed that when she pointed out errors in the OER textbook to the publisher, they made corrections within two weeks—far better than waiting for the next edition, as with traditional textbooks. And she was able to adapt the OER, inserting additional readings as needed. This flexibility is a great benefit to faculty.

This event was also well attended, with about 70 people—and not the same 70 who came to the January event. (Many presentations from the event are on Vimeo, at https://vimeo.com/undcilt.) The Student Government President, Brandon Beyer, gave a presentation on the importance of OERs to students facing financial hardships. He then announced he was writing a bill to present to Student Government, offering to use $75,000 from Student Government Reserve Funds to support stipends for faculty to adapt courses to use OERs. Had we not included Student Government in the OER WG, we would not have received this kind of support. Mr. Beyer also approached the Provost, who contributed $25,000—giving us a total of $100,000 for OER support.

Shortly after this announcement, Mr. Beyer met with Dean Walker to work out details. When Mr. Beyer presented the bill to Student Government in April, 2017, Dean Walker attended and spoke about the impact on students. The bill passed unanimously. This was a critical point, showing that the students themselves were investing in OERs. Faculty were very impressed by this. The last views of OERs as a bad idea, and an incursion on academic freedom, were gone. We continued to emphasize that there aren’t existing OERs for every course, and that OERs are simply one more tool for faculty in developing courses—but a worthy tool.
The OER WG next developed a Qualtrics site for grant proposal applications, and announced to the faculty that up to $100,000 was available for faculty stipends. We required faculty to obtain a letter of approval from their Deans, to ensure that Deans were aware of faculty activities. We also required information on the impact—the cost of other resources, the number of students, etc. We preferred courses that had large enrollments or costly textbooks, to maximize savings, but also indicated that we would take applications for courses with smaller impacts if they were in academic areas where UND was especially strong. There are many open textbooks for Introductory Psychology, for example, but not many for Petroleum Engineering, where UND has a superb program; by accepting a Petroleum Engineering application, we could “give back” to the greater corpus of OERs. We approved 13 of 14 applications, in Mechanical Engineering, Nursing, Anatomy, Sports Medicine, Business, Geology & Geological Engineering, Petroleum Engineering, Chemical Engineering, Communications, Electrical Engineering, and Biomedical Sciences. With multiple applications in some disciplines, and OERs in every College, we felt that our extensive publicity work was having an effect, and that faculty were telling other faculty about their successful experiences. In June, 2017, we again held faculty workshops, adapting them once more based on earlier feedback.

We also tallied the total “maximum savings”—how much we had saved the students, in total, from September, 2015, to the present, if we assumed students would have bought new textbooks. This is not a fully accurate reflection of savings; many students buy used textbooks, rent them, etc. As there is no way to estimate what percentage would have rented texts or bought them used, we do our tally and include the qualifier. The maximum savings we have provided for UND students thus far: $3.7 million in just two years.

Where Are We Now?

In just two years, we have achieved a major culture shift. UND is the acknowledged state leader in OERs. Senior staff from the State Auditor’s Office have visited Dean Walker twice, and will be writing a report on OERs; we anticipate that it will state that this has been a worthy investment of funds and effort, and should be further supported. The State Legislature has not yet increased funds for post-secondary OER support, but has passed a bill expanding OER support to K-12 education. Dr. Spilovoy moved to a position advocating for OERs at the Western Interstate Commission for Higher Education (WICHE); Dr. Heitkamp no longer co-chairs the OER WG, but remains interested and involved. OERs are bigger than ever at UND.

The OER WG continues to hold one OER event per academic term, and is learning which are most appealing and likely to be well-attended. The Library expanded its online guides on OER-related topics, and hired a Scholarly Communications Librarian who joined the WG. Other staff joined the WG as well, and the group meets regularly and splits into subcommittees as needed. We continue casting a wide net, involving faculty, staff, and students in the WG and events. This has been critical to maintaining strong support. We keep adapting our events and workshops, and have tweaked our grant proposal form and created an FAQ, based on what we learned. We’ll issue another request for grant proposals shortly. That will likely exhaust the $100,000, but we’re hopeful that support from Student Government, the Provost, and the Legislature will continue.

Meanwhile, UND’s culture around OERs has changed completely. Faculty are eager to participate. Every College uses OERs. Considerations regarding OERs, and support for OERs, are being added to the Faculty Handbook and Tenure & Promotion procedures: adaptation of a course to use OERs may now be considered “Teaching” and not just “Service,” and creation of a new OER may be considered under “Research/Scholarship.” OERs are
now considered resources like any other—there are good OERs and poor ones, and it is up to faculty to evaluate them for their courses. Tellingly, Dr. Petros—the respected senior faculty member who excoriated OERs at the University Senate in 2015—now serves on our panels and at events, advocating for adoption of OERs wherever feasible.

**Keys to Our Success**

What were the keys to our success? The following have been critical:

**Tireless advocacy/outreach/marketing**

Dean Walker was given a clear mandate to support OERs, and she uses every opportunity to do so, as do all members of the OER WG—faculty, staff, and students alike. Students and senior administration made their support clear by providing funding. We’ve spoken about OERs to everyone who would listen, from State Government to non-profits to local media and more. We have marketed OERs everywhere and in every way we could. We hold events at least once a term, and advertise on social media, library websites, other UND websites, local media, UND media, and more. We’ve also built detailed online guides (using LibGuides software) on relevant topics.

**Coalition Building**

The OER WG began with Dean Walker, the Dean of Libraries & Information Resources, and Dr. Heitkamp, a faculty member who was also part of Senior Academic Administration. Our first outreach was to Dr. Spilovoy at NDUS, then to various units on our campus—the Office of Extended Learning, the Center for Instructional & Learning Technologies, the Office of Instructional Development, Student Government, and, thanks to Dr. Heitkamp’s professional relationships, several faculty members. We added more staff, more faculty, and other members; we turned no one down. Soon, faculty heard about OERs at every turn. When the deans began working with a University Senate Committee to revise the Faculty Handbook, Dean Walker used the opportunity to include information about OERs, and to have OERs recognized as valid academic endeavors.

**Creating a Strong Support Program**

The Libraries, the Center for Instructional Learning Technologies, the Office of Instructional Development, and the General Counsel all participated in workshop development. We offer strong technological, informational, and pedagogical support. Faculty do not have to locate all OERs themselves; librarians can assist. Instructional designers and technology support staff help with technology. The availability of Legal Counsel staff has also been crucial; faculty have had many copyright questions.

**Deepening Liaison Relationships**

Every UND subject liaison librarian is well briefed on OERs. These librarians use their departmental ties to
promote OER events, LibGuides, faculty workshops, grants, and more. Also, all units that support technology or pedagogy have members on the OER WG, and are involved in promoting and supporting OERs.

Seeking Broad Funding

We had funding from the State Legislature, the UND Office of Extended Learning, the Dean of Arts & Sciences, the Provost, the Northern Plains Heritage Foundation, and the Robinson Fund. Multiple internal and external sources of funding helped convince people that OERs are valuable and valued.

Luck/Timing

Our timing could not have been better. We had a state budget crisis, and a new Governor was elected. In July, 2016, we also inaugurated a new UND President—the Honorable Mark Kennedy, a former Minnesota Congressman. With Governor Burgum forced to make deep cuts to higher education, among other areas, to balance the budget, President Kennedy was happy to have a good news story showing that UND was aware of the difficulties faced by students dealing with higher education costs, and how we were developing ways to help. The ROI for OERs was impressive, as was student investment in the project. Sometimes, being the good news story in the midst of a lot of bad news really helps.

What Have We Learned, and How Do We Assess and Adapt?

Keep Membership Broad, but Prepare for Change

People can’t commit to “forever” on committees. Dr. Heitkamp was critical to getting the OER WG launched and to its early success, but she was only seconded to the Office of the Provost for special projects. When she returned to her own teaching and research, she became too busy, especially after winning a multimillion dollar grant, to remain on the committee. Have a plan in place to replace key people, and keep committee membership fresh and active.

Sometimes What People Say They Want isn’t What They Show Up for

At one point, we got feedback on our events saying that faculty wanted something more hands-on, less lecture-style. We developed an event that was half guest speaker, half hands-on. Most people came to hear the nationally renowned speaker, then left, knowing they could contact the folks offering hands-on training at their convenience. We won’t use that format again, and we’re considering more brief workshops now that many faculty have general knowledge of OERs.

Make Important Things Mandatory

If you don’t require faculty to attend workshops, some faculty may assume they can skip them. This can result in misunderstandings, or the development of things that aren’t truly “open.” We made this mistake once, and learned from it. Workshops are now mandatory for grant recipients. Also, until September, 2017, we had no institutional repository in which to deposit OERs, so while faculty were creating them, and keeping them in Blackboard, the Library did not have a copy. We now ask faculty for copies to deposit in the new UND Scholarly Commons
OERs are now mentioned in the Faculty Handbook and in Promotion & Tenure guidelines. We have been able to show clear or potential benefits in many areas, including cost to students, flexibility for faculty, and student retention. We are watching to see if OERs may result in increased numbers of transfer students. OERs are being used for many introductory courses, and several are online. Some are available as “Enroll Anytime” self-paced online courses. Theoretically, a student can get through first year now without buying a textbook, and high school or college students taking online UND courses that use OERs might be enticed to enroll at UND, where they have already earned credits.

Assess, Adapt, Repeat

We have gathered feedback on events, spoken to faculty who used OERs, and worked with faculty who assessed how students did with OERs compared to traditional textbooks. We take this information and make changes as we go. We constantly adapt our tools, workshops, and guides.
In all, we have travelled a long road with regard to OERs at UND. When we began we were somewhat mired in a very traditional outlook, where commercial (and increasingly costly) textbook publishers were seen as virtually the sole option. UND had very few OERs in practice, and no institutional support to facilitate change. OERs were regarded with considerable suspicion and resistance. In just two years, we have made dramatic changes. Now, UND has a vibrant Working Group that is widely seen as the “go to” group for assistance, and that receives regular queries from interested faculty; even when there isn’t a current round of funding, faculty contact us months before lectures begin, saying “I’m thinking of switching to an OER—can anyone help me find what I need?” Interest has grown every year. The Library is also seen as a source of information on related topics, such as copyright, scholarly publishing, and evaluation of resources. Publicity has been strong and overwhelmingly positive, and the WG continues to offer events, workshops, and seminars on OERs and related topics, and to avidly publicize these across campus and beyond. Students have benefited tremendously, and see the Library and the OER WG as advocates for them in this area; they also continue to advocate for OERs themselves.

The benefits have been substantial: in addition to saving students money, some courses using OERs have seen a marked drop in withdrawals, and the faculty enjoy being able to customize the text so that it truly meets their needs. Support has come from multiple quarters, including government, internal funding, UND Student Government, foundations, and donors, and this broad support has further strengthened the program. In a bit of late-breaking news, students from across NDUS, led by UND Student Government President Cole Bachmeier, just successfully convinced the Legislature to provide an additional $100,000 to further support OERs. Success breeds success.

No longer considered suspect, OERs at UND are now strongly supported by students, administration, and faculty, and integrated into the fabric of the university—and there are indications that this support is spreading across other NDUS institutions as well. We have completely changed the culture around OERs at UND. UND Libraries are respected for their leadership role in OERs, across UND, NDUS, and even in the State Legislature. We continue to advocate for their usage and development, and continue to adapt the ways in which we support them. OERs at UND are here to stay.

Author Bio:

Stephanie Walker has been the Dean of Libraries & Information Resources at the University of North Dakota Libraries since September 2015, and previously held library leadership positions at the City University of New York – Brooklyn College, Harvard University, Mount Saint Vincent University (Halifax), and the University of Toronto. She founded and currently chairs the Open Educational Resources Working Group at the University of North Dakota.