

# Valuing OER in the Tenure, Promotion, and Reappointment Process



# VALUING OER IN THE TENURE, PROMOTION, AND REAPPOINTMENT PROCESS

EDITED BY ANDREW MCKINNEY

KELLY ARISPE; SHAWNA M. BRANDLE; EMILY  
CARLISLE-JOHNSTON; CHERYL (CUILLIER) CASEY; CARINA  
CHERNISKY; JUNIE HAYASHI; SOLEDAD LENCINAS; BETH  
TILLINGHAST; JASON YAMASHITA; SHARON CLAPP; ANGELA K.  
WALKER; CAILEAN COONEY; CATHARINE DISHKE HONDZEL;  
ELAINE CORREA; ALEXANDER REID; JAMES DOVEL; KATHY  
ESSMILLER; CRAIG FINLAY; ISABEL SOTO LUNA; MICHELLE  
HARRISON; BRENNAL CLARKE GRAY; BRENDA SMITH; ALISHIA  
HUNTOON; CHRISTINA HENDRICKS; WILL ENGLE; STACY  
KATZ; BRIAN LINDSHIELD; IZABELA MAZUR; CHRISTINE  
MILLER; BALA RAJU NIKKU; FELIX KAYODE OLAKULEHIN;  
MICHAEL PASKEVICIUS; DORALYN ROSSMANN; BRIAN W.  
ROSSMANN; LEILA STERMAN; CHRISTINA TRUNNELL; ASHLEY  
SERGIADIS; ANGELA SPIRES; NICOLAS P. SIMON; LISA C.  
YOUNG; ANDREA CORBETT SCOTT; AMANDA COOLIDGE; AND  
DEEPAK SHENOY



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# ACCESSIBILITY STATEMENT

Amanda Coolidge; Sue Doner; Tara Robertson; Josie Gray; Anna Minsky;  
and Andrew McKinney

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## Accessibility features of the web version of this resource

The web version of *Valuing OER in the Tenure, Promotion, and Reappointment Process* has been designed with accessibility in mind by incorporating the following features:

- It has been optimized for people who use screen-reader technology.
  - All content can be navigated using a keyboard.
  - Links, headings, and tables are formatted to work with screen readers.
  - Images have alt tags.
- Information is not conveyed by color alone.
- There is an option to increase font size (see tab on top right of screen).

## Other file formats available

In addition to the web version, this book is available in a number of file formats including PDF for digital distribution and for print, EPUB, XHTML, Pressbooks XML, and Common Cartridge with LTI links. Look for the “Download this book” drop-down menu on the front page of this book (<http://pressbooks.cuny.edu/tenureandpromotioncasestudies/>) to select the file type you want.

## Known accessibility issues and areas for improvement

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- The matrix in Appendix A uses merged cells which but they have been structured to work

properly with screen readers.

- The case study chapters use heading 1 styles for all section headings. These were used because that is only way for Pressbook's collapse heading feature to work.

## Accessibility standards

The web version of this resource has been designed to meet Web Content Accessibility Guidelines 2.0 (<https://www.w3.org/TR/WCAG20/>), level AA. In addition, it follows all guidelines in Appendix A: Checklist for Accessibility. The development of this resource involved working with Josie Gray who helped test the content.

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You can contact us one of the following ways:

- Email: [andrew.mckinney@cuny.edu](mailto:andrew.mckinney@cuny.edu)
- Email: [info@doers.org](mailto:info@doers.org)

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# INTRODUCTION

Andrew McKinney

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## Why Tenure, Promotion, and Reappointment?

If you have been a part of the field of Open Educational Resources (OER) for any length of time, you've likely come up against a very basic problem: how do we incentivize faculty to adopt, adapt, or create OER. The easiest (although not always easy) answer is “with money.” Monetary incentives for OER work is largely the field standard. However, a two-fold question arises fairly quickly for anyone looking to build an OER program: what if we don't have any money or run out of it and what if money isn't enough to incentivize faculty? It's a response to those questions that animates much of this volume. Lacking money or faculty motivation, how do we build culture around OER at our institutions? The answer for many of us in the field is through the inclusion of OER work into the standards of tenure, promotion, and reappointment. As has been encountered by countless OER practitioners, however, the work that they do is not immediately or obviously relevant in their journey towards job security or promotion. So, how do we make it relevant?

This volume is the most recent of many attempts by Driving Open Educational Resources for Sustainable Student Success (DOERS3) (<https://www.doers3.org/>) to address this question. DOERS3 is a collaborative of 36 public higher education systems and state or province wide organizations that are committed to supporting student success by promoting free, customizable OER. Members of DOERS3 divide themselves into three working groups: Research, Equity, and Capacity Building. DOERS3's work on tenure and promotion has come out of the Capacity Building group, whose charge has been to address persistent obstacles to the sustainability of OER programs. As a group, we chose to work on the issue of tenure, promotion, and reappointment because of the volume of questions we were seeing at our own institutions and in the field writ large that asked for guidance for OER practitioners as they navigated the tenure, promotion, and reappointment process.

Initially, we thought about a number of approaches. We could draft a model policy that institutions could adopt. However, there weren't many policies at the time that included OER in their tenure and promotion guidelines that we could build on and we had some reservations about the kind of top-

down guidance this would represent. We also thought about creating a model “dear colleague” type of letter that provosts and deans could use to advise departments and faculty that OER work should be valued when making personnel decisions. This also felt top down and potentially not very effective given what we understood to be a process mostly governed by departments.

Given our reservations about more top-down approaches, we settled on the idea of creating a tool that faculty could use to translate their OER work to the existing standards of tenure, promotion, and reappointment (a big theme in this volume). In our initial conversations about this work, Deepak Shenoy, Amanda Coolidge, and I struggled to understand the best approach. With the help of the folks at The ScholCommLab’s Review, Tenure, Promotion project (<https://www.scholcommmlab.ca/research/rpt-project/>), we were able to get access to a large collection of RTP documents from all over North America. Review of this corpus gave us the sense that our instincts towards a bottom-up approach were warranted especially given the wide array of standards we saw in the RTP documents, not just across university types but within schools themselves.

With that in mind, we settled on what we came to call the OER Contributions Matrix (see Appendix A (#back-matter-appendix-a-the-oer-contributions-matrix)). In the matrix we have list a variety of types of OER work (adoption, adaptation, and creation, along with other types of work like improving learning and building community) and try to map that work to the three most common categories of tenure and promotion dossiers: research, teaching, and service. Our initial draft of the matrix had just the work and categories, but after some feedback from faculty, we added an evidence column that suggested how you would document the work you were doing and justify its inclusion in a given category. We tried to keep the categories, work, and evidence as abstract as possible so that it could apply to as many institutions as possible and we openly licensed the work so that it was clear that our intent was for people to remix it for their particular contexts.

Upon release, Amanda Coolidge and I wrote a couple of short articles for Inside Higher Ed (<https://www.insidehighered.com/advice/2021/08/10/work-open-educational-resources-should-be-valued-tenure-review-opinion>) and the New England Board of Higher Education’s “Practitioner’s Perspective” (<https://nebhe.org/journal/practitioner-perspectives-the-doers3-collaborative-on-oer-in-tenure-and-promotion/>) blog and gave numerous presentations at conferences and showcases to socialize the matrix with the OER community. The response has been tremendous. You’ll see several remixes in this volume but it’s worth highlighting two adaptation not in this volume. First, a great remix from Oregon (<https://docs.google.com/document/d/1jW8trs2GbU793Q02NwbFbZm5PKjEZOn3fPZ6LqDqiMU/edit?usp=sharing>) that adds a column for examples of how faculty in

Oregon have included their OER work in the tenure and promotion dossiers. Second, a translation of the matrix into French ([https://www.doers3.org/uploads/1/3/2/2/132273765/cadre\\_de\\_reconnaissance\\_des\\_contributions\\_rel.docx](https://www.doers3.org/uploads/1/3/2/2/132273765/cadre_de_reconnaissance_des_contributions_rel.docx)) done by the Canadian Association of Research Libraries' Open Education Working Group. This is the type of work we envisioned when we created the matrix.

However, as we presented at conferences, fielded questions about the matrix, and saw how people were remixing it, two major things stood out. First, what we envisioned initially as a bottom-up tool for faculty to use while they narrated their work in their individual dossiers was being used at a multitude of levels on campuses and across systems. It was clear that this issue was resonating at the policy and culture building level and that administrators and other supporters of OER were looking for guidance. Second, faculty in Oregon weren't the only ones who wanted to see examples of how people were talking about their OER work in their dossiers. Time and time again, when we presented the matrix or spoke with folks interested in using it they asked for examples. The matrix addresses the need for a tool to help people think through the translation of OER work to the standards of their institutions but the necessary abstract nature left people wanting for more narrative. So, with the help of a grant from the Hewlett Foundation and support from the whole DOERS3 Capacity Building Work Group, this volume came to be.

## Why Case Studies?

Aside from the obvious pedagogical value that a case study has (clear structure, not too long, emphasis on actions taken and results achieved) and the clear desire the field had for concrete examples, a major reason we decided on this format was the influence of *Marking Open and Affordable Courses: Best Practices and Case Studies* (<https://uta.pressbooks.pub/markinopenandaffordablecourses/>), a guide that I personally refer to on a regular basis and resonates with everyone in the OER community who uses or wants to use course marking at their campus. In the spirit of *Marking Open and Affordable Courses*, we wanted to create a resource that people could come back to and would help guide them as they navigated the tenure, promotion, and reappointment process or tried to change culture or policy at their institution to value OER.

Casting a wide net as we solicited case studies, we wanted to hear from faculty who were at any stage of their career, from administrators supporting OER, from librarians (faculty status or not). We wanted to hear success stories and lessons learned from failure. We wanted to hear from community colleges, regional comprehensives, and R1s. The response we got did this and more. This volume contains 27 case studies from faculty, librarians, and administrators at a broad range of college and

universities who are working through the tenure, promotion, and reappointment process themselves, supporting others as they do so, or both. All of the case studies went through an open peer review process, a process we know from several of the case studies themselves is essential to legitimate OER work as valuable.

The case studies in this volume could have been organized in a variety of ways: by college type, by job description, by type of intervention. The organization settled upon, however, was faculty narratives about their process, narratives of policy and culture change, and a section dedicated to case studies all from one university, Thompson Rivers University in British Columbia. A number of case studies could have been in either of the first two sections as so many of the authors here occupy dual roles at their campuses as both faculty and as support people for others doing OER work. A significant theme across the sections is the way that those in both support roles and faculty roles find that advocating for the value of the OER work of even one person has network effects across an institution. Faculty who do OER work and attain tenure become advocates for others doing the same; seeing someone go through the tenure and promotion process gives administrators data for what resonated with committees and what didn't; and committees themselves become educated as to how to understand OER work. But, this wasn't the only theme that arose out of these case studies.

## Major Themes

### Mapping activities to a standard

Just as we attempted with the OER Contributions Matrix, a recurring strategy and recommendation is to map your OER work to some kind of standard. This might be your college's strategic plan or mission. It might be the (hopefully clear and documented) standards and categories of your department or college's tenure and promotion guidelines. It might be something outside the campus like the UN's sustainable development goals. Either way, by mapping your work to accepted and supported standards at your institution, you are doing some of the work of translation that many of the case study authors pointed to as one of the primary labors that OER practitioners and administrators needed to do in order for their work to be intelligible to decision makers. Multiple authors talk about the difficulties they had getting campus administrators and their colleagues on tenure and promotion committees to actually understand both what OER work is and also how that work would fit into their institution's goals and standards. There are numerous examples of this translation work throughout the studies collected here.



## Keeping track and measuring impact

A common recommendation for faculty, wherever they are in their careers, is to track the amount of work they're putting into their OER efforts and to gauge the impact that work has beyond themselves. This is good general advice for all faculty regardless of their level of involvement in OER, but it is especially important for faculty engaged in OER to track their time and engagement so as to help make their work commensurate to more traditional academic labors. In addition, after the work of adoption, adaptation, or creation is done gauging its impact is also important. Multiple authors argue the digital nature of most OER and the platforms that serve them can be leveraged relatively easily to help decision makers understand the reach of the work. An essential aspect of OER is its ability to travel and keeping track of your work's journey into other classrooms and campuses is invaluable as you argue for its significance.

## The scholarship of teaching and learning (SOTL)

Adopting, adapting, or creating OER is often seen as outside the category of research. However, as a majority of the authors point out, assessing the impact on learning that your use or creation of OER has had in your classroom can easily become research. SOTL is increasingly recognized as valuable research across the disciplines and comes up again and again in this volume as a viable strategy for making OER work count as research, often the most heavily weighted of categories. Folding your OER activity into SOTL projects can also bridge the gap between teaching and research. Researching your work's impact on learning can apply to individual faculty as an effective strategy but also could be leveraged as a culture building strategy as well where administrators and staff at Centers for Teaching and Learning or faculty or staff in libraries can hold workshops or convene SOTL researchers to seed interest in doing OER SOTL projects. The more SOTL research into OER there is, the better that is for OER.

## Networking

Networking is another strategy that appears in many forms here. Networking within your campus, within the field of OER, and within your discipline to find others doing OER. At the faculty level, networking gets you a higher profile, showing how your work impacts the field more broadly but also helping you recruit outside reviewers for your tenure case. For culture builders, networking outside your institution exposes you to different approaches and networking inside your institution build

more institutional knowledge of OER and creates for less translation work for the faculty practitioners. For everyone, networking creates opportunities to share your work and learn about the work of others but also to connect and collaborate.

## Legitimization strategies

Mapping work to standards and measuring the reach and impact aren't the only strategies suggested for making OER work read as legitimate academic work. For those looking to build a culture around OER at their campuses, the OER (sub)committee is a common theme. Not only do committees set up a space and model for collaboration but they also signal to the community that there is support for the idea of OER across the campus. Internal grants for OER adoption, adaptation, and creation is another important strategy that many in this volume argue has been vital to their colleagues understanding OER work as both valued by the institution but also as commensurate activity with research and innovative teaching practice. Similarly, the use of awards and letters to officially recognize OER faculty is a proven strategy to legitimize both the honored faculty but also the idea of OER in the eyes of colleagues.

## Sharing Resources

As a field, we value sharing across the board and this is no different in the T&P discussion. A major theme across throughout this volume is an emphasis on the transparency that sharing materials can create. This includes faculty who are going through their tenure process sharing their tenure and promotion dossier so that others can see how they talked about their OER work, administrators and staff creating and sharing resources that demystify the tenure and promotion process, and researchers compiling and analyzing the tenure and promotion criteria from the departments on their campus to see who does and doesn't mention open or OER. Hopefully, readers can see this volume as another instance of this type of resource sharing that contribute to the transparency of opaque processes.

## Things missing

Although this project yielded a robust and diverse set of case studies that should benefit the field for years to come, it's worth noting some of the things that are missing.

## Adjuncts

Readers may notice the lack of adjunct faculty in this volume. According to the American Federation of Teacher’s 2020 “Army of Temps” report ([https://www.aft.org/sites/default/files/media/2020/adjuncts\\_qualityworklife2020.pdf](https://www.aft.org/sites/default/files/media/2020/adjuncts_qualityworklife2020.pdf)), nearly 75% of instructional workers in US higher education are non-tenure track employees, the vast majority of which are part time. In our request for proposals (RFP) we tried to make it clear that this collection was for everyone: full time tenure track faculty, non-tenure track faculty, part time faculty, librarians (many of whom have faculty status), administrators, staff members, etc. Case study authors were paid for their time and we made that clear in the RFP. However, we did not have any responses from adjunct faculty. Why this happened is something I’ve mulled over quite a bit. It’s hard to reach adjuncts due to contingent nature of their employment so perhaps we just didn’t reach enough people with the RFP. It has also been my personal experience as an adjunct and as an administrator that the terms of adjunct employment can be extremely arbitrary and that no matter the quality or volume of work an adjunct produces, reappointment can hinge on budgetary and enrollment factors more than anything. Hence, an adjunct being reappointed on the strength of their OER work might not be a very common occurrence. The foregrounding of “tenure and promotion” in our communications about the project might also have made adjuncts assume the project was not relevant to them. Regardless of the reason, the lack of adjunct representation amongst the case studies is troubling and cause for reflection.

## Very few university-wide policies

Amongst the many successful stories collected here, there are very few university wide policies that include OER in tenure, promotion, or reappointment guidelines. Although this is a significant missing link in the process of building a sustainable culture around OER at a campus, it is clear that the lack of university-wide policies has not stopped folks from organizing from below. It could be argued that the lack of university-wide policy has animated many in their culture building and individual struggles for recognition. An optimistic read of the situation is that this lack is merely an expression of how much room for growth we still have for a field. A slightly more pessimistic read of the situation is that changing university policy is so difficult in some institutions that it’s better to concentrate on departmental level politics and hope to build your culture from below. Either way, university-wide policy that includes OER in tenure and promotion guidelines is notably absent from the vast majority of stories here.

## Not a lot of finished stories

The lack of policies above might also just be explained by this last missing element. A major theme across these case studies is that of unfinished work. Partially, this just mirrors how OER itself are very rarely finished products. The field of OER places an emphasis on iterative work and continuous improvement. Culture building is also not a linear process. As we deal with new developments in academia (new trends in ed tech, changing fiscal environments) and with rapid turnover in administrations, it can be hard to maintain consistent momentum. However, if we can understand this work not as “unfinished” but as “in progress” we can see this collection as a series of stories meant to guide us only part of the way. As OER are iterative and in a constant state of revision toward improvement, so is the process of legitimizing it as a field and practice.

# ACKNOWLEDGEMENTS

Andrew McKinney

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This project was a truly collective effort at every step and required the time, attention, and expertise of more than 40 people along the way.

At the very beginning stages, the members of the DOERS3 steering committee and Capacity Building Working Group were instrumental in taking this project from a vague idea to a concrete plan. Deepak Shenoy, Andrew McKinney, and Amanda Coolidge developed the initial OER Contributions Matrix. Amanda and Andrew socialized it across the field via countless meetings and conference presentations. The initial proposal for the book was hashed about by Andrew, Amy Hofer, Cheryl Cuillier, Judith Sebesta, and the rest of the Capacity Building Working Group. The DOERS3 steering committee's support of the project and willingness to write it into a Hewlett Foundation grant proposal was essential to getting things off the ground.

Angela DeBarger from the Hewlett Foundation deserves special acknowledgement for seeing the value of the project and generously funding it accordingly. Without her support, we would not have been able to create this resource. Funding from the Hewlett Foundation allowed us to pay writers, peer reviewers, Scribe for proofreading, and a production manager to work on the design and accessibility of the text.

Thanks and praise to all the case study authors. Their dedication to both their institutions and the field is apparent and their patience with what became a somewhat lengthier process than anticipated is much appreciated.

Every case study was peer reviewed by two peer reviewers in an open peer review structure. Our peer reviewers were Merinda McLure, Jonathan Poritz, Judith Sebesta, Shannon Smith, and Patricia Westerman. Their thoughtful feedback greatly improved the depth of these texts and they can't be thanked enough.

Josie Gray shepherded the manuscript after we got it back from the proofreader into Pressbooks, fixing formatting errors along the way, and did an accessibility review to make sure the text met appropriate accessibility standards.

Lastly, this project would have taken even longer and its editor been even more disorganized without the help of Annika Many and Luisa Rodriguez of EdBridge Partners. Annika and Luisa organized the authors and peer reviewers, handled all the paperwork needed to get everyone paid, and gently pushed the project along after the numerous times it stalled out. Luisa also designed the cover image. Without their help, this project never would have come to fruition.

## PART I

# NAVIGATING THE TENURE, PROMOTION, AND REAPPOINTMENT PROCESS

Case studies in this section are mainly focused on the authors' experience of including their OER work in their journey towards promotion and job security. Although quite a few authors in this section also offer insight into the process of culture change at their respective campuses, the main focus of the case studies in this section are on their individual experiences. There are a range of colleges, job types, and ways that work can be categorized in a tenure and promotion dossier represented. We hope that anyone looking for examples of how to integrate their OER work into their tenure and promotion dossier will find that here.





## Case Study 1.

# Demonstrating the Impact of OER Work for Promotion to Full Librarian

Cheryl (Cuillier) Casey

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**Case study writer:** Cheryl (Cuillier) Casey, Full Librarian

**Institution:** University of Arizona, Carnegie Classification: Doctoral Universities, Very High Research Activity

**Type of intervention:** As an academic librarian, OER was a unifying theme in position effectiveness, scholarship, and service in my successful dossier for promotion.

## Background

The University of Arizona (UA) was established in Tucson in 1885, before Arizona became a state. It is a public, land-grant university and a Hispanic-Serving Institution. As of fall 2022, student enrollment was more than 51,000 (10,727 are graduate students). I am the UA Libraries' open education librarian and have been leading OER initiatives at the UA since 2014. Now in the scholarly communication unit of the Libraries' Research Engagement Department, I am responsible for leading efforts to raise campus awareness of OER and increasing adoptions, adaptations, and creations; administering our Pressbooks publishing platform; building campus partnerships and supporting the UA BookStores' Pay One Price program ([https://shop.arizona.edu/payoneprice\\_student](https://shop.arizona.edu/payoneprice_student)); and advancing Z-Degrees.

Librarians at the UA have faculty status and go through a continuing status and promotion (CS&P) process, which is parallel to promotion and tenure (P&T). Faculty rank progresses from assistant to

associate to full. Early career librarians typically start at the assistant rank with continuing-eligible status. CS&P criteria for librarians are set by the University Handbook for Appointed Personnel (UHAP 4A.3) ([https://policy.arizona.edu/employment-human-resources/promotion-and-continuing-status?\\_gl=1%2A5kzvhm%2A\\_ga%2AMjEwMDQ3MDcuMTY3MTcyNTIwNQ..%2A\\_ga\\_7PV3540XS3%2AMTY3NTYzODM0OS43NC4xLjE2NzU2MzkwOTYyNjAuMC4w](https://policy.arizona.edu/employment-human-resources/promotion-and-continuing-status?_gl=1%2A5kzvhm%2A_ga%2AMjEwMDQ3MDcuMTY3MTcyNTIwNQ..%2A_ga_7PV3540XS3%2AMTY3NTYzODM0OS43NC4xLjE2NzU2MzkwOTYyNjAuMC4w)) and the Library Faculty Assembly (LFA) (<https://new.library.arizona.edu/about/lfa>) Bylaws. “Continuing status requires excellent performance and the promise of continued excellence in the candidate’s assigned duties,” according to UHAP. LFA Bylaws call for evaluation of position effectiveness, scholarship, and service. Bylaws assign position effectiveness the most weight, although insufficient scholarship can lead to denial of CS&P. The UA’s Inclusive View of Scholarship (<https://facultyaffairs.arizona.edu/universitys-inclusive-view-scholarship>) allows flexibility in what “counts” for scholarship, and that definition continues to evolve.

## Approach

Seeking promotion from associate to full librarian is optional at the UA. LFA Bylaws specify that promotion to full rank:

- Requires outstanding performance in all aspects of assigned responsibilities as well as widely recognized achievements and contributions to the profession
- Is not a reward for long service but a recognition of superior contributions with every expectation of continuing contributions at the highest level of professional standards

I submitted my dossier for promotion to full librarian in August 2021. As the Libraries’ Open Education Librarian, OER were pivotal to the various required elements of my dossier (see Promotion Dossier Templates (<https://facultyaffairs.arizona.edu/promotion-dossier-templates>)), which included a pandemic impact statement, job descriptions, curriculum vitae (CV), candidate statement, representative work, and portfolio for Leadership, Service, or Innovation.

My aim was to weave together a cohesive story about my accomplishments and impact, using each required element of the dossier to tell a different aspect of the story. As I share sections of my candidate statement, I welcome you to use them for ideas and inspiration, but please note that reuse or remixing requires attribution under the terms of this book’s Creative Commons Attribution 4.0 license (<https://creativecommons.org/licenses/by/4.0/>).

My five-page candidate statement focused on OER as a common theme in my job performance, scholarship, and service. While the UA Libraries embrace a “commitment to open,” (<https://new.library.arizona.edu/about/oa-statement>) UA’s administration had not seen OER or course material affordability as a priority. I needed to convince the campus CS&P committee and the provost of the value of this work. “Customizable and free to use by anyone in the world, OER expand faculty’s academic freedom by widening course material options and fostering opportunities for active, collaborative learning,” I wrote in my introduction. “OER also support the University of Arizona’s (UA) land-grant mission of expanding educational access and publicly sharing expertise. My OER work supports UA’s commitments to student success, innovation, equity and inclusion, and global engagement in the campus strategic plan (<https://strategicplan.arizona.edu/about>).”

My statement explained how OER librarianship is newly emerging and required extensive self-directed learning. “OER librarianship—leading campus-wide collaborations to reduce course material costs for students and facilitating faculty’s OER use and customization—is a relatively new specialty in academic libraries,” I wrote in the introduction. “I was among the first nationally to have the title Open Education Librarian. My journey is described in an invited case study (included in Section 4B [Representative Work]) for *The OER Starter Kit for Program Managers* (<https://press.rebus.community/oerstarterkitpm/>).”

To start my statement off strong, my introduction also emphasized the potential savings for UA students: “During the years I have led course material initiatives for the UA Libraries, students have potentially saved an estimated \$5.1 million as a direct result of my achievements and the partnerships I have built.” Quantifying cost savings can be challenging, since there are so many different ways to calculate potential savings. I recommend reading the “Calculating and Reporting Student Savings” chapter by Jeff Gallant in *The OER Starter Kit for Program Managers* (<https://press.rebus.community/oerstarterkitpm/>). Gallant advises reporting conservatively and using caveats such as “potential savings.” In reporting estimated OER savings, the UA uses the Open Education Network’s calculation of \$100 per book multiplied by student enrollment in the course. With our library-licensed e-books, estimated savings were based on student enrollment multiplied by the price of the textbook.

In the position effectiveness section of my candidate statement, I framed my OER work in terms of service to faculty and OER’s impact on student success, citing the 2018 University of Georgia study:

I am passionate about lowering the cost of course materials for students. During the UA’s 2021 Student Success Conference, Timothy Rennick (Executive Director of the National Institute for

Student Success at Georgia State University) emphasized that seemingly small amounts of money can prevent degree completion. High textbook prices can pose real academic challenges for students. Many report not purchasing a required textbook (64.2%), taking fewer classes (42.8%), earning a poor grade (35.6%), or even failing a class (17.2%) due to textbook costs.<sup>1</sup>

By raising campus awareness of textbook affordability issues, and by helping faculty switch to free-to-use or low-cost alternatives, I expand students' access to needed course materials and improve their odds of success. Free-to-use content can lower student debt and increase equity. When students have day-one access to free course materials, a large study found that outcomes improved for all students, but especially for Pell recipients, part-time students, and those from underrepresented groups.<sup>2</sup>

Beyond saving students money, OER allow perpetual access, customization, and opportunities for open pedagogy (<https://opentextbooks.library.arizona.edu/open-pedagogy/>) (involving students in the creation of OER). I have led the university's OER initiatives since 2014. Through 2017, I did this work while also serving as a liaison librarian to the colleges of business and architecture.

Next, I explained the different strategies I used to build the Libraries' OER program and the impacts I achieved:

Cultivating strong campus partnerships also has been key to both roles [liaison librarian and OER program manager]. Bringing together faculty, student government leaders, and campus stakeholders, I took the initiative in 2016 to create an OER Action Committee. I regularly share national OER news and campus OER achievements....

Since 2018, I have overseen the library's expansive Course Driven Acquisitions (CDA) program. Each semester, the library provides UA students with free ebook access to hundreds of required textbooks. I work closely with the UA BookStores and hundreds of faculty on this project. As a result of these collaborations, UA students consistently pay far less for course materials than the national average: In FY20, UA students paid an average of \$253 vs. \$413.<sup>3</sup> The partnership I have formed with our bookstore is truly a national model. In 2020, I worked with bookstore leaders on a Faculty Senate presentation about the collaboration benefits and why the bookstore shouldn't be outsourced [PDF] ([https://facultygovernance.arizona.edu/sites/default/files/Library%20and%20bookstore%20collaborations\\_Senate\\_11-2-20.pdf](https://facultygovernance.arizona.edu/sites/default/files/Library%20and%20bookstore%20collaborations_Senate_11-2-20.pdf)). Faculty responded supportively, and the store remains campus-owned (which benefits students in many ways). "Congrats on making a compelling case that resonated with many Senators," Dean of Libraries Shan Sutton said.

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1. Florida Virtual Campus. (2018). Student Textbook and Course Materials Survey (<https://dlss.flvc.org/research/>).

2. Colvard, N. B., Watson, C. E., & Park, H. (2018). The impact of open educational resources on various student success metrics [PDF] (<https://www.isetl.org/ijtlhe/pdf/IJTLHE3386.pdf>). *International Journal of Teaching and Learning in Higher Education*, 30(2), 262–276.

3. Statistics are from the National Association of College Stores.

Managing CDA, I have leveraged my skills in communication and process improvement to increase ebook access for faculty and students. Notification of ebook availability is now sent to faculty weeks before classes start, rather than the day before the semester begins (by then, students often had purchased books already). I also took the initiative to add a Check for Ebook Availability form (<http://new.library.arizona.edu/request/ebook-availability>) to the library website, which better enables us to proactively assist faculty in finding and adopting free-to-use course materials. Other web resources that I created and manage, such as my “OER Toolkit” and “Best Practices for Image Use” page, have been promoted online by leaders in the OER community.

In the next section, I summarized my work administering our Pressbooks publishing platform and leading OER learning communities:

Pressbooks, a user-friendly platform for publishing OER, was another opportunity I identified. The library and Digital Learning unit now partner on providing it to campus, and any UA student or staff member can create a project in Pressbooks (<https://opentextbooks.library.arizona.edu/>). As of August 2021, the UA’s platform has more than 400 users and 110 projects. As the lead network manager, I collaborated with learning technologist Kryz Ziska Strange to launch the platform in 2020. We also led beginning and advanced Pressbooks learning communities, which had an immediate impact. “Now Pressbooks is a very significant part of my teaching in Fall and the plan is way better than it would have been,” iSchool professor Diana Daly said after participating.

In 2020–21, I supported Daly and her large general education course as they worked on the Humans R Social Media (<https://opentextbooks.library.arizona.edu/hrsm/>) textbook in Pressbooks. This OER project, featuring student-created media and essays, presents diverse viewpoints and firsthand accounts that are rare in commercial textbooks. It was the first book in UA’s Pressbooks Catalog (<http://opentextbooks.library.arizona.edu/catalog/>) and is a great example of open pedagogy. This project also demonstrates how my scholarship and service build upon functional work. During my Spring 2021 sabbatical, I researched the project’s impact on learning outcomes. A forthcoming publication (Open Pedagogy: Independence and Interdependence in Teaching About New Media (<https://spir.aol.org/ojs/index.php/spir/article/view/12157>)) with survey results that support open pedagogy as a tool for student engagement, is in Section 4B [Representative Work].

In the scholarship section of my candidate statement, I explained that my scholarship is informed by my course material work. I also emphasized the importance of choosing to openly publish my scholarship: “Since becoming an Associate Librarian, I publish in open access journals and ebooks without a paywall barrier. I share my slide decks with an open license that enables free reuse and customization.”

At the UA, promotion and tenure criteria (and continuing status and promotion criteria) do not

specifically mention OER or open access. But I made the case that the university’s “Inclusive View of Scholarship” encompasses an online curriculum I helped create and revise:

Other resources I have written fit into the category of Publicly Engaged Instruction in the UA’s “Inclusive View of Scholarship.” (<https://facultyaffairs.arizona.edu/universitys-inclusive-view-scholarship>) As an instructor for the national Certificate in OER Librarianship since 2018, I have been extensively involved in the planning, development, editing, and updating of online instruction modules. So far, the program has trained 151 librarians to lead OER programs (Section 7A [Portfolio for Leadership, Service, or Innovation: Assessment] explains more about its national impact). I had sole responsibility for creating the “Making It Real” module and contributed to other modules. I extensively reviewed and updated the 2020 and 2021 curricula, adding newly available material.

I began the service section of my self-reflection by emphasizing my involvement in the Open Education Network and explaining its importance in the OER movement:

At the national/international level, my most impactful service has been to the Open Education Network (OEN). I have been actively involved in the network since 2015, when I helped the UA become one of its first 10 members. Since then, the network has expanded internationally and now spans more than 1,560 colleges and universities. Its Open Textbook Library (<https://open.umn.edu/open-textbooks>), which includes reviews by UA faculty from my OER workshops, currently features about 900 complete textbooks. In addition to being a founding Certificate instructor, I have exponentially expanded my impact by training new system/consortial members to lead OER workshops and course material initiatives. Using a train-the-trainer approach, we have been able to instruct up to 70 people at a time; participants then deliver trainings on their individual campuses.

I also addressed OER in other parts of my dossier:

- My pandemic impact statement shared how we converted in-person instruction for the Certificate in OER Librarianship to online modules and webinars. I included the number of times the videos had been viewed on YouTube and emphasized that they remain publicly available as a resource.
- My CV listed scholarship, service, continuing education, and grant proposals related to OER. I noted invited presentations, seen as a sign of national reputation.
- The Portfolio for Leadership, Service, or Innovation: Assessment shared how we created and assessed the Certificate in OER Librarianship program. “Our eight-person instructional team spent more than 14 months developing the initial curriculum,” I wrote. “With the support of an instructional designer, we created online modules with readings, videos, discussion questions, self-quizzes, and activities. Some of my scholarship has been integrated into the

curriculum as mandatory or optional readings.” I summarized the results of a participant survey.

## Results

In 2022, I was successfully awarded promotion to full librarian.

## Recommendations

- Assume that reviewers of your dossier are unfamiliar with OER, so briefly explain what OERs are and how they benefit students, instructors, your institution, and the world. Incorporate key phrases from your institution’s strategic plan, mission, core values, and/or similar documents, and emphasize how your OER work advanced these institutional priorities.
- Demonstrate the *impact* of your work throughout your dossier. Use statistics such as usage or cost savings; quotes from faculty, staff, and students you have helped (I keep an email folder called “Nice Feedback”); and other qualitative and quantitative data. If your institution uses the Pressbooks publishing platform (<https://pressbooks.com/>) to produce and host OER, it provides good analytics on the number of visitors and total page views, most-viewed chapters, and where site traffic originates. Significant traffic from other .edu websites can indicate that other colleges and universities have adopted your Pressbooks publication.
- In addition to the DOERS3 matrix for OER in Tenure and Promotion (<https://www.doers3.org/tenure-and-promotion.html>), check out the Iowa Open Education Action Team’s Open Education in Promotion, Tenure, and Faculty Development (<https://oept.pubpub.org/>) and Oregon’s adaptation of the DOERS3 matrix (<https://docs.google.com/document/d/1jW8trs2GbU793Q02NwbFbZm5PKjEZOn3fPZ6LqDqiMU/edit?usp=sharing>) for advice and tips.

## Case Study 2.

# Language Matters: Making a Dual Case as an OER Expert and Creator

Emily Carlisle-Johnston

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**Case study writer:** Emily Carlisle-Johnston, Research and Scholarly Communication Librarian

**Institution:** University of Western Ontario; University

**Type of intervention:** In this case study, I share the ways in which I've described my OER work for promotion and tenure (P&T).

## Background

I am a Research and Scholarly Communication librarian at the University of Western Ontario (Western) in Canada—a public, research-intensive, medical/doctoral university with 11 faculties and more than 30,000 students. Western Libraries is organized into six functional teams; as a member of the Research and Scholarly Communication team, my role centers on supporting and advocating for open publishing across the university.

Aside from work happening in dispersed pockets around Western, a coordinated open education program had been on hiatus for a few years when I started my job in December 2020. I have assumed leadership in OER advocacy, education, and support, and in 2022, I developed and launched an OER grant program in collaboration with library colleagues, Western's Centre for Teaching and Learning (CTL), and Instructional Technology Resource Centre (ITRC). I am also a coeditor for an



open textbook on research data management (RDM) in Canada—a Canada-wide project that has been awarded five grants.

Librarians and archivists at Western are represented by the University of Western Ontario Faculty Association, though our collective agreement and our promotion and continuing appointment processes are separate from faculty. As outlined in our 2019–2023 collective agreement, librarians and archivists hired at the rank of general librarian or assistant librarian have six years and four years, respectively, to receive continuing appointment (our tenure equivalent) and promotion to the rank of associate librarian. Criteria for promotion and continuing appointment are applied according to one's appointment and rank across our responsibilities in the areas of Professional Practice (meeting needs of the university community), Academic Activity (scholarly activity), and Service (serving on committees and organizations at the library or university level and beyond).

All librarians and archivists have also been historically required to complete an annual report each year, in which we report on our achievements in Professional Practice, Academic Activity, and Service. Annual reports are included in promotion and continuing appointment files.

## Approach

I started my job as a Research and Scholarly Communication librarian in December 2020 at the rank of general librarian, with the understanding that I would undergo consideration for promotion to assistant librarian within two years and consideration for continuing appointment and promotion to associate librarian within six years. I was hired with a workload distribution of 75 percent Professional Practice, 15 percent Academic Activity, and 10 percent Service.

Since December 2020, I have written two annual reports and submitted my file for promotion to the rank of assistant librarian. In our annual reports, Professional Practice is evaluated with consideration to application of professional knowledge, communication skills, innovation and creativity, leadership, and teamwork. For librarians and archivists undergoing promotion to the rank of assistant—like myself—promotion files are evaluated according to the following:

- Demonstration of a sustained record of achievement in Professional Practice
- Evidence of one's ability to effectively use their professional education
- Demonstration of a capacity to develop and extend expertise in Professional Practice and Academic Activity

- Demonstration of a satisfactory record of performance in Service

When I am later under consideration for continuing appointment and promotion to associate librarian, my Professional Practice will be evaluated according to my demonstration of initiative, leadership, and creativity; my ability to apply skill and critical thinking to problem-solving; and evidence of continued growth in my expertise. My Academic Activity will be evaluated not on my potential in this area but instead on my record of Academic Activity and its quality, creativity, productivity, and significance to librarianship or archival practice. Per our collective agreement, an Academic Activity record typically includes invited or refereed journal publications, invited or refereed papers or conference presentations, published monographs, and other things like non-peer-reviewed publications, unpublished works or works in progress, and creative works.

## OER in Professional Practice

In both annual reports that I've completed and in my promotion file, my leadership of Western's OER portfolio featured heavily in my Professional Practice. In describing my OER work in my annual reports, I borrowed language from the evaluation criteria to detail how my OER projects and support demonstrate my application of professional knowledge, my communication skills, my initiative and/or creativity, and my leadership and/or teamwork.

For example, in detailing my establishment of and support for Western's first-ever OER grant program, I emphasized that my leadership and initiative were what made the program happen. I noted that I initiated the program by writing a proposal for funding that Western Libraries' Senior Leadership Team approved and by establishing connections with the Centre for Teaching and Learning (CTL) and Instructional Technology Resource Centre (ITRC) that resulted in each unit dedicating expertise as in-kind support to grant recipients. I acknowledged my teamwork in collaborating with representatives from these units and with other librarians to build and launch the program while also highlighting my leadership in chairing each meeting and in shaping and driving the work of the group. I also listed the in-kind expertise that I provided or would provide to grant recipients (e.g., training on Pressbooks, support in finding and attributing openly licensed resources)—supports that I noted were a product of my professional knowledge.

In describing workshops I'd developed or consultations I'd held with instructors seeking advice on finding, creating, or using OER, I likewise highlighted the professional knowledge that I drew on. To make clear the impact and importance of my professional knowledge, I provided examples of things

the instructors wouldn't have been able to do without my knowledge and expertise, like acquiring a DOI and ISBN for the digital exhibit they created with Pressbooks or sharing their OER for others to use via a digital repository. That instructors were able to put the knowledge and expertise that I shared into action is also evidence of my communication skills, which I was sure to include in both annual reports.

The criteria for evaluating Professional Practice in a promotion file is more vague, at least when going up for promotion from general librarian to assistant librarian. The Professional Practice section of my file didn't exclusively focus on OER, but I did borrow much of the examples and language around OER from my annual reports. These examples (which spoke to my leadership, professional knowledge, teamwork, and initiative) already provided sufficient evidence of my ability to use my professional education. To demonstrate a sustained record of professional achievement, and my capacity to develop and extend professional expertise, I traced my entire career as a librarian to date, including my two previous professional positions. OER has had a growing presence in my professional practice over the course of these three jobs; my file thus traced my growth as a librarian, culminating with the leadership that I've taken to establish an OER program at Western.

## OER in Academic Activity

Coediting an open textbook on research data management is a more recent endeavor, and so it wasn't relevant to my promotion file; my 2021–2022 annual report was the first time I wrote about this activity. In annual reports, Academic Activity is assessed according to ongoing engagement (i.e., progress on a project) and dissemination in a given year. Given that this project was in the early stages and not yet ready for dissemination, I noted what the eventual dissemination would be—a peer-reviewed, introductory open textbook with 18 chapters—along with the progress we'd made and my contributions to that progress. At that point, my coeditors and I had written and shared a call for proposals, reviewed all proposals, and sent rejections and acceptances with feedback. I had taken the lead in writing a style guide and chapter template that was shared with all authors and in writing peer review guidelines that were used by all peer reviewers. We had collaborated on a grant proposal that was successful—providing funds for professional copyediting—and in assigning chapter drafts to peer reviewers with relevant expertise. I included all of this in my 2021–2022 annual report.

## Results

### OER in Professional Practice

In each of my annual reports, I've received a score of Very Good for my Professional Practice, which is well above the acceptable level. I was also promoted to the rank of assistant librarian without issue and without having to clarify anything I'd submitted in my promotion file. While I didn't receive formal feedback on my file (beyond learning that I was successful), I did learn that nearly every single letter of support that was submitted by my colleagues at Western highlighted my leadership of the OER portfolio as one of the key reasons that they were in support of my promotion.

Receiving credit under Academic Activity for my work as a coeditor on an open textbook, however, was not as straightforward.

### OER in Academic Activity

In my 2021–2022 annual report meeting, I was told I should classify my coeditor work as Service rather than Academic Activity, since I myself was not authoring the chapters.

Now this was not a concession that I was willing to make, nor were my coeditors (who are also librarians at Western Libraries). First, I already have a (more than) full Service load. But more to the point, I believe that if the library wants to increase OER use and creation on campus (and if it rewards people like myself for leading advocacy and providing the necessary supports to make this possible), then it needs to start by valuing the work of OER creation and use among its own. How are we supposed to tell faculty, instructors, and administrators across campus that this work is important and valuable if our own incentive structures don't treat it as such?

To make my case, my manager and I returned to the language detailing Academic Activity responsibilities in our collective agreement, which states that Academic Activity involves some or all of the following: (1) the creation of new knowledge, including understanding or concepts; (2) the creative application of existing knowledge; or (3) the organization and synthesis of existing knowledge. I needed to revise the description of my coeditor responsibilities in my annual report, making it clear how these responsibilities fulfilled some or all of the eligible kinds of Academic

Activity. I made the case that my role as coeditor for the open textbook fulfilled the latter two by stating,

The project itself—one only made possible because of my application of expertise in open education and open publishing—is a creative form of knowledge mobilization, in which existing knowledge is compiled and shared into formats suitable and effective for teaching those unfamiliar with the subject. In partnership with the other co-editors, I selected the topics that were essential for those needing an introduction to Research Data Management (RDM), and selected expert research partners to author chapters that synthesize those topics. I am working closely with authors to ensure that each chapter conveys the necessary content, and that the resource as a whole is organized logically so as to provide a comprehensive and consistent overview of RDM.

This explanation proved effective in making my case, for now; I was able to retain my categorization of this work under Academic Activity. I expect that in future annual reports and in my file for continuing appointment and promotion to associate librarian, I will have to remain intentional with how I describe my role in coediting an OER. My language choice should mirror the language used in laying out the expectations and evaluation criteria for Academic Activity to ensure that readers can clearly see how my role in the project is within scope.

## Recommendations

To those engaging in the creation, use, or support of OER, who also intend to apply for promotion or tenure in the future, I recommend that you

- Consult promotion and continuing appointment criteria before committing to OER responsibilities, to ensure that it is possible to make a case for your intended OER work within existing criteria.
- Borrow language from your P&T criteria to describe and make a case for your own OER work, in order to make it as easy as possible for reviewers to see that this work does indeed fit within institutional criteria.
- Accept support from any colleagues who are also engaged in or allies to your OER work. There's strength in numbers.

## Case Study 3.

# BackdOER to Tenure: Using Framing and Scholarship of Teaching and Learning to Make My OER Work Count

Shawna M. Brandle

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**Case study writer:** Shawna M. Brandle, Professor of Political Science and Open Education Coordinator, Kingsborough Community College, and member of the Digital Humanities MA Program at the CUNY Graduate Center

**Institution:** Kingsborough Community College (KCC), a public two-year institution, an Asian American and Native American Pacific Islander-Serving Institution (AANAPISI), and the only community college in Brooklyn, New York

**Type of intervention:** Using open education work, scholarship of teaching and learning articles, and framing to make OER work recognizable through my institution's existing guidelines for tenure and promotion to associate and full professor.

## Background

Kingsborough Community College is a public two-year institution offering more than 50 programs of study, from liberal arts and criminal justice to nursing and marine technology. Kingsborough is a part of the City University of New York (CUNY), and as such, is governed by the collective bargaining agreements signed by the PSC-CUNY (the union representing instructional staff and higher education officers), the bylaws of CUNY, and the CUNY Board of Trustees. As a community college, there is a significant teaching load; for tenure-track faculty, when I began in 2013, it was five

courses in the fall and four in the spring, which was revised to 4–4 in fall 2016 due to a new contract being implemented.

Unlike many other institutions, at CUNY, promotion and tenure (P&T) are separate processes. Often, promotion to associate professor and tenure occur at the same time (in the fifth year for four-year colleges, the seventh for two-year colleges), but promotion can be pursued separately from tenure any time after four years of service.<sup>1</sup> Kingsborough, like all of the institutions in CUNY, has developed its own more specific tenure and promotion guidelines, the latest of which was released in July 2019.<sup>2</sup> Excellence in scholarship, teaching, and service is required for tenure and promotion to associate and full, with excellence in scholarship usually proven through at least two peer-reviewed journal articles (at least one of which must be solo-/lead-authored) and one additional item (another article, realized grant, or invited talk). Solo-authored books are counted as two journal articles, and “scholarly articles on pedagogy in one’s field” are explicitly recognized as acceptable articles for the purposes of tenure and promotion.<sup>3</sup> The two-plus-a-third publication formula is required for each personnel action whether they are applied for individually or simultaneously, so a total of four articles and two third items are needed for promotion to associate and tenure, with an additional two articles and one third item for promotion to full.

Kingsborough has a robust, faculty-driven OER program, which was started by librarians with funding from the college in 2016. As I had already begun working on OER in 2014 as will be discussed below, I was able to collaborate with the librarians on their projects and, when CUNY OER funding became available in 2017, to take on the position of faculty leader for OER. Five years later, the program has grown significantly in scale and complexity. I am now the open education coordinator at KCC, coordinating between our open education librarian, KCTL (Kingsborough Center for Teaching and Learning), KCeL (the Kingsborough Center for e-Learning), various campus initiatives, and program offices, such as College Now and faculty who wish to open up their pedagogy by using, adapting, or developing OER. We have helped instructors from most departments on campus convert some or all of their courses to zero textbook cost courses and offer a variety of programming for those who wish to further explore open educational practices.

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1. The minimum time in rank to apply for promotion to associate is four years, with another four years required at that rank before applying to full. While shortened tenure clocks can be negotiated, this is much rarer and more difficult to obtain than pretenure application for promotion.
  2. “Guidelines for Reappointment, Tenure, and Advancement” [PDF] ([https://www.kbcc.cuny.edu/aa/documents/Promotion\\_Tenure\\_Criteria.pdf](https://www.kbcc.cuny.edu/aa/documents/Promotion_Tenure_Criteria.pdf)), Kingsborough Community College, July 2019.”
  3. “Guidelines for Reappointment, Tenure, and Advancement” [PDF] ([https://www.kbcc.cuny.edu/aa/documents/Promotion\\_Tenure\\_Criteria.pdf](https://www.kbcc.cuny.edu/aa/documents/Promotion_Tenure_Criteria.pdf)), Kingsborough Community College, July 2019,” p. 3

## Approach

The straightforward guidelines for tenure and promotion requirements provided by Kingsborough in the faculty handbook were extremely helpful; I made sure to corroborate my interpretation of the requirements with my department chair and several colleagues to ensure I was setting out on the right track. Because I knew finding time to do tenurable work would be difficult with my teaching load, I began early in my career at KCC to track all of my projects and working hours to ensure that they were all directly tied to something that would strengthen my tenure application as demonstrating excellence in either teaching, research, or service.

The current requirements for tenure and promotion at KCC, as well as those that were in force when I started, do not mention OER creation or innovation with open educational practices anywhere. So when I became interested in open education as a way to help my students who struggled to afford the expensive textbook for my class, I knew I could not justify the time it would take unless I could make it count toward tenure. So I identified a backdoor: I would apply for a grant from the CUNY Research Foundation—the CUNY Community College Collaborative Incentive Research Grant (C3IRG)—to create an OER and test its efficacy in my classes as a scholarship of teaching and learning (SoTL) research project. This OER project demonstrated excellence in teaching and excellence in research, as it was both a realized grant (a third item) and my first solo-authored scholarly journal article,<sup>4</sup> forming the cornerstone of my tenure application. Neither the call for the grant nor the journal I published in was specific to OER, but I was able to use the grant and SoTL publication to make the OER work I did legible to my tenure reviewers as research. Additionally, doing the OER SoTL project demystified the process of writing an article while showing me the value of systematically examining my teaching, which led to my second SoTL article,<sup>5</sup> further improving my pedagogy and adding another publication to my file.

Networking is an essential component of a successful academic career, and my open education practice and research helped me build my network and scholarly profile on my campus, across CUNY, and beyond, in my discipline and in the field of open education. Firstly, developing an OER for my SoTL project in 2014–2015 led me to seek out the few colleagues at Kingsborough who were

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4. Brandle, S. (2018). Opening up to OERs: Electronic original sourcebook versus traditional textbook in the Introduction to American Government course ([https://academicworks.cuny.edu/kb\\_pubs/195/](https://academicworks.cuny.edu/kb_pubs/195/)). *Journal of Political Science Education*.

5. Brandle, S. M. (2019). Games, movies, and zombies: Making IR fun for everyone ([https://academicworks.cuny.edu/kb\\_pubs/194/](https://academicworks.cuny.edu/kb_pubs/194/)). *Journal of Political Science Education*.



also doing OER work at that time, which made me feel connected to others on my campus and positioned me to take on a substantial role when Kingsborough received OER funding from CUNY in 2017. My work as faculty leader for OER counted as significant service to the college while simultaneously giving me the chance to work with lots of new colleagues across all of the disciplines of the college; many of these colleagues would be sitting on the tenure and promotion review committees when I applied in 2019 and 2021, and they likely would not have known my name if not for OER.

My OER research helped me meet many new people across CUNY as well. Now that I was working on OER, I looked for opportunities to present about them at large-scale CUNY-wide events like the CUNY IT (Information Technology) Conference, where I met colleagues across the 25 institutions that make up the CUNY system who were also involved in OER. I was very lucky in that many of these chance introductions turned into fruitful relationships, generating invitations to speak and present at other events, which led to meeting more people, creating a virtuous cycle that connected me to colleagues, opportunities, and research collaborators on multiple CUNY campuses.<sup>6</sup> As a direct result of these connections, I was able to participate in the 2018 Open Education Leadership Summit and serve on a hiring committee at CUNY Central for a position related to OER. I was also able to collaborate with open researchers at several CUNY campuses to create the CUNY Zero Textbook Cost Student Survey, which used an open data protocol so that the data are available to anyone;<sup>7</sup> we further collaborated to publish a peer-reviewed article about the first semester's results.<sup>8</sup> The people I met and the opportunities I got because of OER work helped me prove the quality of my reputation as a scholar and my service to the wider CUNY system, both of which are preferred requirements for tenure and absolute requirements for promotion to full professor.

A similar story unfolded for my networking in the field of open education. In the open education community, I found inspiration, fellow travelers, and much-needed support, both collegial and material. Through presenting my OER work at open education conferences, I made contact with

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6. There are too many people within and beyond CUNY who have shared with me, inspired me, and helped me reach tenure to recognize them all individually in this piece, but I must mention Stacy Katz as both a major benefit of my open education work and a major contributor to it. As we work on different campuses in different boroughs, in completely different disciplines, it is unlikely that we would ever meet, yet OER brought us together. Since then, she has become a trusted friend, sounding board, co-presenter of numerous workshops, and coauthor on two papers.

7. Brandle, Shawna M., Beck, Sheila, Beth, Amy, Brancaccio-Taras, Loretta, Cooney, Caileen, DiSanto, Jacqueline M., Hays, Anne, Katz, Stacy, Miles, Linda, & Morrison, Abigail. (2019). "CUNY ZTC student survey (<http://bit.ly/CUNYZTCSurvey>)."

8. Brandle, S., Katz, S., Hays, A., Beth, A., Cooney, C., DiSanto, J., Miles, L., & Morrison, A. (2019). But what do the students think: Results of the CUNY cross-campus zero textbook cost student survey (<https://doi.org/10.5944/openpraxis.11.1.932>). *Open Praxis*, 11(1), 85.

open educators across the country and the globe, who I was lucky enough to learn from (and sometimes commiserate with), some of whom later invited me to give talks, resulting in more “third items” for my file that also raised my profile as a scholar, demonstrating excellence in research. From these open education friends, I learned about the existence of the Open Education Fellowship, which gave me professional development, another line for my CV, and financial support to write two more articles and publish them open access.

In my discipline, presenting my OER work at disciplinary conferences introduced me to interested political scientists and connected me to initiatives about pedagogy run by the primary professional society for the field, the American Political Science Association (APSA). Uniting my open education and political science research streams opened up new research questions for me, resulting in two published papers (one of which started because of the idea of adding an OER lens to a paper I saw at an APSA conference).<sup>9</sup> Because there are very few political scientists who also work on open education, my OER research and advocacy in disciplinary spaces became part of what I was known for by other political scientists, raising my scholarly profile and making me a resource for colleagues at many different institutions and at APSA, which again led to significant additions to my tenure and promotion file: a profile by APSA for their Career Paths Series,<sup>10</sup> an invited talk in a political science department out of state, and inclusion in the APSA Online Teaching Workshop in 2020. As it turned out, the close relationships I forged with political scientists through my OER work came in very handy, when through a bureaucratic error, I was not informed that I was required to solicit letters in favor of my application for promotion to full until the last minute. I am eternally grateful to my political science colleagues who replied quickly and flooded my provost with letters of support on extremely short notice. I likely would not have known any of them, nor would they have been familiar enough with my work to write letters, especially on no notice, without my OER work.

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9. Brandle, S. M. (2022). The book costs how much??? Textbook cost & OER awareness in political science, *Journal of Political Science Education*; and Brandle, S. M. (2020). It's (not) in the reading: American government textbooks' limited representation of historically marginalized groups. *PS: Political Science & Politics*, 53(4), 734–740, which was inspired by the conference presentation of an early draft of Tolley, Erin. (2020). “Hidden in plain sight: The representation of immigrants and minorities in political science textbooks.” *International Journal of Canadian Studies*.

10. Interested in a Community College Career? Dr. Shawna Brandle Talks about Her Experiences at Kingsborough Community College

## Results

I was successful in my applications for promotion to assistant, tenure, and full, despite applying as early as possible for both promotions. While I had other research and service in my applications, without the OER-related contributions, my file would not have been sufficient for all three personnel actions. Throughout my time at Kingsborough, I have pushed for more explicit recognition of open education work for tenure and promotion, both on my campus and at CUNY Central, a practice that I have expanded since my promotion to full was made official. No changes to official policies have yet occurred, but until they do, I will continue advocating for those changes to every administrator, department chair, and tenure and promotion committee I encounter. I will also continue sharing my own experience, as well as grant applications and human subject research protocols, with every colleague I can, so they can navigate a path that works best for them.

## Recommendations

- As soon as you step on the tenure track, actively seek out documentation and guidance on the requirements. If your institution does not provide a written list (and even if it does), ask your department chair and others at your institution to confirm the requirements and for any unwritten expectations. Once you have identified the requirements, figure out where you can fit your open education work into the existing requirement and then frame all of the open education work you are doing around those requirements. Use the same words from the tenure and promotion guidelines wherever possible in describing the open education work you are doing. For example, you are not using open pedagogy in your classes; you are developing your excellence in teaching by using open pedagogy in your classes. You are not sharing your OER experience and knowledge with colleagues in your department; you are providing service to the department by sharing your OER experience and knowledge with your colleagues. You aren't evaluating whether open educational practices are effective in your classes; you are demonstrating excellence in research by doing scholarly research on teaching and learning, which you will publish in a peer-reviewed journal. Use this framing in all of your communications with your department chair and provost, starting early to educate them about how your open education work really does meet the tenure and promotion requirements at your institution. This will not only benefit you when you apply for tenure and promotion but may help prime decision-makers like your department chair, provost, and senior colleagues to

see open education work as a valuable (and thus tenurable/promotable) contribution to the institution for future hiring and promotion considerations at your institution.

- If SoTL articles count toward your tenure and promotion, then design one, examining an aspect of your use of open educational practices (evaluating it in your class, testing OER against other materials, collaborating with colleagues to do the same in their classes; the possibilities are endless!). It is a great way to improve your teaching without worrying you're spending too much time on it,<sup>11</sup> since the SoTL article will count toward your tenure, thereby demonstrating excellence in teaching and research simultaneously.
- Network and collaborate with as many open educators at your institution and in your discipline as possible. This will give your open education work a broader reach on your campus; tenure and promotion committees are institution-wide at many institutions, so developing colleagues who know your reputation across the campus will be very helpful when you go up for review. In your discipline, sharing how open education has been helpful in your teaching will help you meet other like-minded scholars in your field, who you can learn from and collaborate with (on open education or disciplinary research) and who will form the pool of possible letter writers for your tenure and promotion files. You can share at disciplinary conferences, whether general or teaching focused, in SoTL articles published in disciplinary journals, and/or through participation in discipline-wide initiatives and workshops.
- Even after you are tenured and promoted, continue to advocate for the explicit recognition of both SoTL articles and open education work at your institution for tenure and promotion so that those who come after you have an easier job of making their tenure and promotion cases, as both greatly improve teaching and learning at their institutions and align with most educational institutions' stated values, missions, and goals. The ways in which you push and the methods you use will be specific to you and your institution, but what is most important is that you keep pushing!

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11. It is important to acknowledge the ludicrousness of this oft-repeated statement. I could not exclude it, as it is both common and helpful advice for most scholars seeking tenure and promotion. However, it is a major indicator that the tenure and promotion system has many mismatched incentives if spending too much time on teaching (which is between 25 and 80 percent of the workload of many tenure-track positions) is an actual concern.

## Case Study 4.

# Significant Value Added to Tenure Application by Developing and Promoting OER Materials

James Dovel

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**Case study writer:** James Dovel, DBA, Assistant Professor of Business Administration

**Institution:** Shepherd University is a four-year-and-above North American public university with a 2022 enrollment of 3,235 students. It is categorized as small program master's colleges & universities with balanced arts and science/professions with some business-dominated graduate programs. The enrollment profile is very high undergraduate, four-year, and full-time

**Type of intervention:** OER Intervention Utilization: This case discusses the experience utilizing OER to improve course materials, increase student engagement, reduce student costs, while helping meet tenure and promotion requirements, and it outlines efforts to focus on cultural change at the university and department level.

## Background

After personal student experiences as a first-generation college student and my appointment as an assistant professor of business administration at Shepherd University, I became interested in developing open education resources (OER). My personal experience and education in innovation and entrepreneurship helped shape a vision where OER involvement could be used to fulfill multiple tenure requirements while improving class materials, research, and the ability to engage students.

The experience started by applying for and receiving an OER grant application and led to multiple opportunities. The grant was utilized to convert a graduate entrepreneurship class to OER. This led to a formal presentation at a conference, a presentation at a webinar, the creation of a student-led textbook, the writing of this case study, applying for another OER grant, and converting an undergraduate class to OER.

This chapter explains my experience learning about, developing, and using OER materials and how this related to my pursuit of promotion and tenure (P&T). It also explains my experience from the institutional level in promoting and developing procedures to lower textbook costs.

## Approach to Include OER Work in the Promotion and Tenure Process

Faculty tenure and promotion at Shepherd University are separate but intertwined (Handbook for Faculty and Academic Administrators (<https://www.shepherd.edu/faculty-handbook/>)). Promotion includes up to four possible ranks, including instructor, assistant, associate, and full professor. The tenure system includes a period of tenure track followed by tenure. Tenure and promotion are both largely based on three performance criteria, instructional performance, service, and professional development. The Shepherd University Faculty Manual [PDF] (<https://media.suweb.site/2022/05/Faculty-Handbook-2022-2023-final-August-11-2022.pdf?v>) includes specific guidelines for each of these three categories. Instructional performance measurement is based on student evaluations, teaching strategies, course development, supervision, and assessment. Service includes professional organizations, in-service presentations, community service, program coordination, public service, and service on committees. Professional development includes publications, seminar and workshop attendance, consulting, grant activity, research, and academic presentations.

## Utilizing OER in Tenure

The experience with OER significantly improved the tenure application in all three areas (see Figure 1). Instructional performance is a key measure for the achievement of tenure. One important project created a textbook with 14 MBA students as a class project through a unique learning opportunity in Entrepreneurship, MBA 501 ([https://catalog.shepherd.edu/preview\\_course.php?catoid=17&coid=30005&print](https://catalog.shepherd.edu/preview_course.php?catoid=17&coid=30005&print)), a graduate-level business administration class. The subject and level are both suited to

this project. Learning objectives for graduate studies include achieving in both research and writing. Entrepreneurship is also a vocational topic that rapidly changes. Concepts, examples, and content become outdated very quickly. Therefore, entrepreneurship courses provide an excellent opportunity for the development and use of OER materials. In addition to the positive financial effects of OER in entrepreneurship, class materials were improved and kept up to date while enhancing instructional performance.

The assignment details and directions for the student build-a-textbook project included the following. Historic, conceptual, and current reading were individually assigned to each student. Topics were guided by existing textbooks and current research and practice in entrepreneurship. The project utilized the discussion board tool within the learning management system. Each student after reading their required material created a weekly post with the following information:

1. Title
2. Subject
3. Summary/description of an important concept or an example or application of an important concept
4. Multiple choice question designed for a quiz
5. Discussion question designed for an in-person discussion or a discussion forum
6. PowerPoint slide(s) that someone could use to teach the concept or example
7. In-person students presented their topic using the PowerPoint slide(s), while online students recorded a presentation; using PowerPoint is an easy way to do this
8. Provide a reference(s) list in APA format

Content was created weekly, reviewed by fellow students, and provided with instructor feedback. After the completion of 11 posts, the posts were assigned to chapters. Each chapter was assigned to individual students to edit, combine, and create a finalized chapter with the instructor resources. Two graduate students edited and combined the chapters into a textbook and addressed copyright issues to enable the publishing of the final product for OER use.

This project improved my tenure application in several ways. A service component in the tenure application was enhanced through the involvement in OER by participation in a university-wide committee on textbook affordability. This assignment to a high-profile committee was a direct result of my extensive participation with OER. The committee was created by the 2022 West Virginia House Bill 4355 ([http://www.wvlegislature.gov/Bill\\_Status/bills\\_text.cfm?billdoc=HB4355%20EN](http://www.wvlegislature.gov/Bill_Status/bills_text.cfm?billdoc=HB4355%20EN)



R.htm&yr=2022&sesstype=RS&i=4355). This gave me a role in promoting OER activities with my college. It also gave me access to course text and material costs across the university. My next yearly report and my upcoming P&T application will include an argument that my courses are less costly, more engaging, and contain better materials.

The third component of professional development (see Figure 1) was significantly enhanced by participation in OER activities. A successful OER grant application, funding, and administration from Open Learning West Virginia (WV) added value under grant activity for professional development. After grant acceptance, I presented “Using a Flipped Classroom to Develop OERs for a Graduate Entrepreneurship Class” at the 2022 West Virginia Open Learning Convening. The annual convening brought together experts in OER development. This presentation contributed to the professional development portion of the tenure application and helped provide foundation and feedback for the previously described build-a-textbook class project.

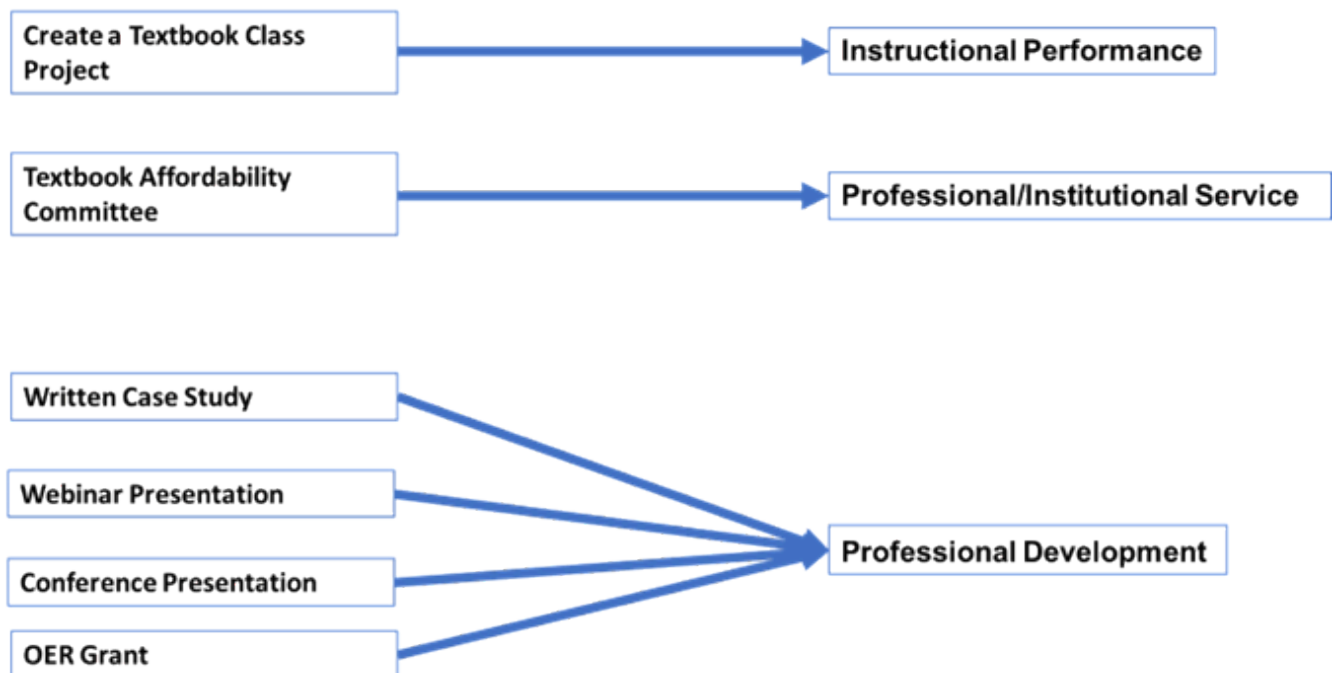


Figure 1: Connecting OER to the Tenure Application [Figure 1 Image Description]

Another opportunity arose to present the build-a-textbook project concept to the West Virginia OER community of practice webinar. The webinar is a monthly meeting held by Open Learning West Virginia (<https://wvclimb.com/about-oer/>) for developers and users of OER material. This added to professional development applications and created feedback to improve the project. Finally,



the acceptance to write this case study added to professional development through publication activity.

## Utilizing OER in Promotion

Promotion at Shepherd University contains many of the same requirements as tenure (Figure 2). The textbook project supports the requirement for assistant professors to emphasize student learning. All the components of this OER experience in turn directly support the promotion to associate professor in the three key areas of instructional performance, continuous service, and professional development. The same elements are then required for promotion to full professor.

## Approach to and Involvement in Cultural Change at the Department and Institutional Level

I am also involved with an overall effort focusing on cultural and operational change at Shepherd University to track and lower textbook costs. The previously mentioned West Virginia House Bill 4355 ([https://www.wvlegislature.gov/Bill\\_Status/bills\\_text.cfm?billdoc=HB4355%20ENR.htm&y r=2022&sesstype=RS&i=4355](https://www.wvlegislature.gov/Bill_Status/bills_text.cfm?billdoc=HB4355%20ENR.htm&y r=2022&sesstype=RS&i=4355)), which amended the West Virginia Higher Education Opportunities Act (HEOA) that required all state educational institutions to form an Educational Materials Affordability Committee by July 1, 2022. Shepherd University formed the committee with the main purpose of minimizing course material costs while encouraging the use of high-quality materials. I was assigned to this university-wide committee because of my participation in OER activities.

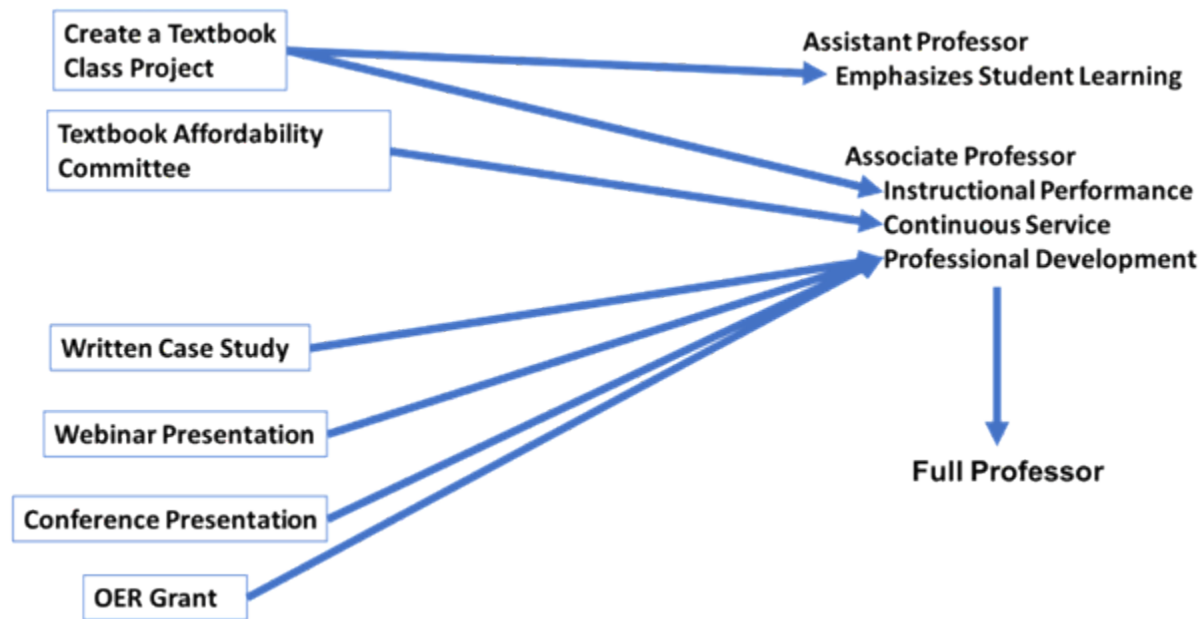


Figure 2: OER Application to Faculty Promotion

The committee's responsibility includes encouraging the limited the use of new textbook versions that are not substantially different, creating bookstore policies that reduce course material costs, adopting less expensive publisher e-text versions, supporting OER development and use, creating an efficient bookstore operation, monitoring faculty and staff compliance with the Higher Education Opportunities Act, ensuring the preservation of student confidentiality in course material transactions, and informing faculty of prohibited actions with respect to class materials. The committee is headed by the vice president of facilities, who oversees the bookstore. It includes representatives from faculty, faculty training, and the bookstore manager.

The committee is required to make sure the institution complies with the new law's requirements. These include listing all required materials for each course prominently at the institution. The listing must include OER and if it is being provided at no cost. Any associated fees or costs must also be listed so that students can make informed decisions when registering for classes. Students must also be given the opportunity to withdraw from courses with a full refund of material costs if they are affected by new or increased charges. Additionally, all bookstore proceeds must be reinvested in student materials.

The committee worked in conjunction with the bookstore leadership to make sure that the university followed the new law. Policies and procedures were adopted to promote low-cost alternatives and provide a framework for properly reporting cost outcomes to the West Virginia Higher Education

Policy Commission. The committee promoted its purposes and policy updates to the faculty senate. Committee members provide departmental communication reminders regarding course material adoption and cost-reporting requirements. This communication supports regular requests from the bookstore.

Messaging for these communications includes adopting early, why adoption matters, the need to adopt even if there are no student costs, not putting off adoption, and things to consider at adoption time. Faculty are asked to consider the following before adopting course materials:

1. Is this textbook still in print?
2. Can you use that old edition one more semester?
3. Is the textbook available in digital and/or rentable formats?
4. Does this textbook truly provide the best value for the student?
5. Have new, innovative, and less expensive ways to convey the needed material to the students been considered?
6. Is this really the best option for the students?

The West Virginia Higher Education Policy Commission also adopted categorization and reporting requirements to support the spirit of the new law. Categories included OER (no cost per HB 4355 definition ([https://www.wvlegislature.gov/Bill\\_Status/bills\\_text.cfm?billdoc=HB4355%20ENR.htm&yr=2022&sesstype=RS&i=4355](https://www.wvlegislature.gov/Bill_Status/bills_text.cfm?billdoc=HB4355%20ENR.htm&yr=2022&sesstype=RS&i=4355))), no textbook assigned, low cost (\$1 to \$75), and high cost (greater than \$75). This report results in a student material cost profile by institution. The cost of materials by university is available to state policy and lawmakers.

These institutional- and state-level initiatives are continuing the conversation about the importance of student costs and encouraging the adoption of lower- or no-cost course materials while still maintaining quality. In addition to these policies and communications, there are initial discussions about making OER lessons part of new faculty training. One of the members of the committee is responsible for new faculty training and an OER grant recipient and advocate. In addition to developing plans for new faculty, I will present information from this case as part of Shepherd University's Focus on Student Learning Series (<https://www.shepherd.edu/faculty-affairs/cfe-home>) in the fall of 2023. Leading this training will also add value to my tenure application.

# Results

## Tenure and Promotion

During the time frame of this case study, I experienced one annual faculty evaluation and a pretenure review. The OER activities described above were a very significant portion of the support for both. During the annual faculty evaluation, merit was approved with a meritorious rating in professional development. This rating was based in part on presenting “Using a Flipped Classroom to Develop OERs for a Graduate Entrepreneurship Class” at the Open Learning Statewide Convening, presenting “Creating OER Using a Create a Textbook Assignment Using the Discussion Board Tool” at the Open Learning WV Webinar, attending the two previously mentioned conferences, attending a training on open licensing and Creative Commons, being selected to write this case study, creating the entrepreneurship textbook mentioned above, and engaging in ongoing OER in entrepreneurship education research.

During my pretenure review, the P&T committee stated, “You are making good progress toward attaining tenure.” The chair stated, “I am very confident that you are making excellent progress toward tenure.” And the dean stated, “You are making excellent progress toward tenure and promotion.” The previously mentioned activities also played a significant role in these favorable pretenure review ratings.

In addition to these formal reviews, evidence is being collected for my upcoming annual report and tenure application. Classroom results from the development and use of OER materials will play a central role. The graduate students who participate in the create-a-textbook assignment are excited to receive a book with themselves as contributors. Significant new course material—with dozens of up-to-date concepts, examples, and business practices—is now available for future classes. The student course evaluations for the previously mentioned graduate entrepreneurship class included 100 percent agreeing that (1) course materials supported learning, (2) the course enhanced my understanding of the subject, and (3) the instructor was effective at teaching the course. I received another WV OER grant to produce OER class materials for Exploring Entrepreneurship, BADM 301 ([https://catalog.shepherd.edu/preview\\_course.php?catoid=17&coid=28541&print](https://catalog.shepherd.edu/preview_course.php?catoid=17&coid=28541&print)), an undergraduate course, saving even more for students while maintaining interesting and high-quality materials. The textbook created in the graduate course is being adopted for the undergraduate course.

The previous OER activities combined with new OER activities will be a significant part of my upcoming tenure application.

## Departmental and Institutional Culture

The previously described approach from the state, university, committee, and individual levels to decrease student material costs and adopt OER and other valuable practices is in its beginning stages. However, significant incentive to not develop and adopt OER exists. Textbook vendors continually offer newer, often higher-cost resources with the promise of making adoption and delivery easier. Publishers also offer training with class setup and course design. The easiest way to create a course is to adopt existing publisher resources. Both full-time and adjunct faculty have significant incentive to partner with existing textbook publishers rather than create OER material. There is also a significant number of online and hybrid courses being taught because of the pandemic and the changing landscape. Online course offerings increase this incentive to work with established publisher relationships.

The steps implemented so far have merely started the discussion about reducing course material costs and OER. Individual faculty and departments are making efforts to improve course material affordability. Examples include several OER projects, the adoption of OER textbook platforms such as OpenStax, and examples of adopting low-cost materials. There is no institutional pushback against OER. The administration is very supportive of OER. The resistance is more individualized coming from hard-working full-time and adjunct faculty with their short-term success tied to already developed content and platforms.

## Recommendations

- Instructors should overcome their concerns and strongly consider creating and adopting OER. It improved my teaching, excited the students, created new materials, fulfilled numerous tenure requirements, and provided experiential learning opportunities.
- Instructors should design and develop projects with multiple goals that create materials while improving student research, student writing, student presentations, student engagement, and experiential learning and address P&T requirements. Your research will be aimed at the classroom, and the classroom will improve your research.

- Institutions should formalize OER as part of faculty training and include course material cost and quality in faculty, chair, and dean evaluations.
- Institutions should target highly enrolled classes for OER development at department, institutional, state, and even the national level with OER projects that can be used across a large number of course sections.

# Image Description

**Figure 1 Image Description: Connecting OER to the Tenure Application**

OER Activity	Connection to Tenure Application
Create a Textbook Class Project	Instructional Performance
Textbook Affordability Committee	Professional/Institutional Service
<ul style="list-style-type: none"><li>• Written Case Study</li><li>• Webinar Presentation</li><li>• Conference Presentation</li><li>• OER Grant</li></ul>	Professional Development

[Return to Figure 1]

## Case Study 5.

# OER in Educational Leadership at UBC

Christina Hendricks and Will Engle

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**Case study writers:**

- Christina Hendricks PhD, Professor of Teaching, Philosophy; Academic Director, Centre for Teaching, Learning and Technology
- Will Engle MLIS, Strategist, Open Education Initiatives, Centre for Teaching, Learning and Technology

**Institution:** University of British Columbia: University

**Type of intervention:** This chapter documents how a UBC faculty member weaved her OER work into her tenure dossier as evidence of educational leadership for tenure; additionally, based on interviews with UBC faculty members, it makes recommendations of how OER work could be considered more widely for tenure and promotion requirements in other academic streams.

## Background

The University of British Columbia (UBC) is a large Canadian research university with two main campuses located in Vancouver and Kelowna, British Columbia. Christina Hendricks is a tenured professor of teaching in philosophy at the UBC Vancouver Faculty of Arts and also the academic director of the Centre for Teaching, Learning and Technology (CTLT). In these roles, she has been involved in the full spectrum of open education work, from creating and using OER and open practices in her teaching to leading and championing university strategies and support for open

education. Will Engle is a strategist for Open Education Initiatives at the CTLT, where he supports university-wide open education initiatives as well as working directly with individual faculty members who wish to incorporate open resources or pedagogies into their teaching and learning.

At UBC, there are two types of tenurable faculty roles:

1. 1. The research and teaching stream (assistant, associate, full professor), for which the tenure and promotion criteria are aligned with the DOERS3 scholarly activity framework of research, teaching, and service (<https://www.doers3.org/tenure-and-promotion.html>)
2. 2. The educational leadership stream (assistant, associate, full professor of teaching), for which the criteria are educational leadership, teaching, and service

Educational leadership is defined in the UBC Faculty Collective Agreement (<https://hr.ubc.ca/working-ubc/faculty-collective-agreement-and-policies>) as “activity taken at UBC and elsewhere to advance innovation in teaching and learning with impact beyond one’s classroom.” Through advocacy by students, the creation of OER was added in 2017 as one example of work that can count as educational leadership in the UBC Senior Appointments Committee Guide to Promotion and Tenure (<https://hr.ubc.ca/career-development/appointment-reappointment-tenure-and-promotion>).

The addition of OER language to the Senior Appointments Committee’s promotion and tenure (P&T) guidelines built upon the long history that UBC faculty, students, and staff have in engaging with open activities. A number of other open education efforts and initiatives have been undertaken to support the adoption of OER at UBC, including the following:

- **Student advocacy:** UBC’s undergraduate student societies have been leaders within the UBC community in advocating for more equitable access to education through the use of OER (see An Open Letter to UBC (<https://open.ubc.ca/an-open-letter-to-ubc/>)). Their efforts have included an annual **#textbookbroke campaign**, which surfaces the costs that students pay for their learning resources, an annual OER Champions event (<https://open.ubc.ca/oer-champions/>), which celebrates faculty who have used OER in their teaching, and advocacy for OER funding and recognition.
- **Recognition for OER in the UBC strategic plan:** In 2018, UBC published a strategic plan (<https://strategicplan.ubc.ca/>) that spoke to the use of OER as a strategy for affordable learning resources.



- **Funding support for OER:** In 2019, the University of British Columbia Vancouver (UBCV), in response to student advocacy, committed \$1 million over four years to the UBCV OER Fund (<https://oerfund.open.ubc.ca/>) for the development and integration of OER into UBC credit courses.

## Approach

As noted above, educational leadership means work done to advance teaching and learning “with impact beyond one’s own classroom,” and the creation of OER can have such an impact. I (Christina) included OER creation, research, training, and advocacy in my dossier for promotion to professor of teaching in philosophy at UBC (<https://christinahendricks.ca/portfolioarchive/>), mostly under the educational leadership category.

For example, I included sharing most of my course materials with an open license on publicly available course websites and submitting some of these to OER repositories. In a first-year, interdisciplinary program called Arts One, for several years, we recorded most of the lectures and posted them—along with slides, essay questions, and student blog posts—on a website called Arts One Open (no longer actively updated), and for some of that time, I was responsible for that site and resources.

I also included some of my scholarship of teaching and learning (SoTL) activities under educational leadership, though they can also count as research. I included conference presentations and publications on OER, such as collaborating with others on a research project investigating faculty use of OER, presenting at several conferences, and producing a final report: “Exploring Faculty Use of Open Educational Resources in British Columbia Post-secondary Institutions [PDF]” ([https://bccampus.ca/wp-content/uploads/2016/01/BCFacultyUseOfOER\\_final.pdf](https://bccampus.ca/wp-content/uploads/2016/01/BCFacultyUseOfOER_final.pdf)).” In addition, I cofacilitated sessions on open education topics at numerous conferences and included one peer-reviewed journal article on OER as evidence of educational leadership.

I also discussed activities related to education and advocacy in open education in my promotion dossier as examples of educational leadership. I presented and cofacilitated workshops on open education several times at UBC on topics such as MOOCs, basics of OER, and involving students in OER. I also codesigned and cofacilitated several open online courses, one hosted through UBC

(Teaching with WordPress (<https://blogs.ubc.ca/teachwordpress/>)) and others beyond the institution (such as “Why Open” (<https://courses.p2pu.org/en/courses/2314/why-open/>)).

Finally, fulfilling the criterion for educational leadership means showing that one’s work has an impact outside of one’s own teaching. As evidence of impact, I included examples of invitations to speak about open education, both at UBC and elsewhere. I also used the number of views of my course slides on the SlideShare platform (<https://www.slideshare.net/clhendricksbc>), as well as of my course videos on YouTube (<https://www.youtube.com/@ChristinaHendricksBC/videos>), as a way to show that OER I have created have been at least accessed by others. Finally, I included letters of recommendation from others speaking about the value and impact of my work in open education.

Regarding advocating for the valuing of OER in reappointment, tenure, and promotion processes, in 2016, I worked with UBC student leaders to discuss how language about OER might be included in these processes. Through the UBC Open Working Group (<https://open.ubc.ca/openubcwg/>), UBC faculty, student leadership, and staff had been engaging in conversations and work related to OER. The students appreciated the value of recognizing instructor OER efforts and took the initiative to talk with the Senior Appointments Committee about adding language to the guide.

## Results

I was granted promotion to professor of teaching after submitting my dossier that had a significant focus on OER work. In order to show others how OER can be included in such processes (and encourage them to do so as well), I have shared my dossier and rationale for including OER with other educational leadership faculty at UBC. I created my dossier on a public website, and this has made sharing very easy. I have heard anecdotally from a few people who found it and have appreciated being able to review it when preparing their own dossiers. I have also shared with other faculty members through panel discussions at UBC about tenure and promotion processes for educational leadership stream faculty and through some one-on-one meetings.

Both of us (Christina and Will) have had discussions for several years about including OER in reappointment, tenure, and promotion dossiers. We have talked particularly about how this work could potentially be counted in areas beyond educational leadership, such as the three areas in the DOERS3 matrix (<https://www.doers3.org/tenure-and-promotion.html>): teaching, research, and service.

## Beyond Educational Leadership

Including OER work as evidence of educational leadership can be a successful strategy, as it is well aligned with the goal of advancing teaching and learning by showing impact beyond one's teaching; however, for faculty in other roles, the inclusion of such work for tenure and promotion can be a more ambiguous process. In preparation for this chapter, the authors held discussion sessions with 10 faculty members at UBC Vancouver across multiple faculty streams who had in-depth experience in creating and teaching with OER. Generally, faculty members reported that their academic departments had different levels of support or acceptance for OER work and that this was a reflection of, or scaffolded by, the level of acceptance of OER activities within their scholarly discipline.

Faculty from all streams included OER work within the teaching area of their dossiers, often as examples of curriculum development or course design. In cases where the OER improved the design or teaching of a course, this was reported as an example of innovation. The adaptability of OER often allowed faculty to extend its use beyond providing learners with content; it was integrated and improved in ways that enhanced the learning of their students. For example, some faculty adapted the material to be relevant to the diversity of experience of their students, integrated and aligned the open materials directly into course modules, and built out interactive functionality to allow for formative self-assessment.

Additionally, faculty from multiple streams reported including aspects of their OER work as scholarly outputs or research activities. Some evaluated the processes and impacts of their creation or use of OER and counted publishing and dissemination as part of the scholarship of teaching and learning. These efforts included presentations at academic conferences and university workshops, as well as research projects published in peer-reviewed journal articles.

A common theme when disseminating OER work was the value of connecting with the academic community beyond one's department. Faculty described having their OER work be recognized within a broad scholarly community as professionally rewarding as well as impactful for validating that work for tenure and promotion purposes. While less commonly, faculty suggested that sharing OER or open practices could also be included within the service area of a tenure and promotion dossier, particularly as outreach within a community or academic discipline.

Overall, faculty in teaching and educational leadership streams generally felt supported in their OER efforts. In contrast, faculty in the research stream reported that OER work could sometimes backfire

in terms of tenure and promotion. Research faculty reported that their OER work could be actively discouraged as something that took away from their primary research role. Such faculty reported that even SoTL research and dissemination could be seen as detrimental to one's primary research focus. This pushback was described as linked to the larger issue of teaching being considered as secondary to research activities, and it represents a major obstacle in research stream faculty supporting OER efforts.

Most faculty, however, reported that the general level of acceptance for OER work has improved over the last five years as awareness, student advocacy, institutional policies, and support for open resources and practices have increased. When an instructor creates and uses OER or opens their educational practices, they are, in effect, publishing their teaching. Embracing open education practices takes time and energy and should be recognized as an important scholarly activity regardless of one's tenure and promotion stream.

## Recommendations

The following recommendations were drawn from the discussions and experiences of UBC faculty engaged in OER work; however, they are intended to be applicable to contexts outside of UBC and to many types of faculty roles.

- Take a robust approach to OER work that includes not only using OER but also evaluating its use and impacts where possible and then disseminating findings. This strategy allows faculty members to position their OER work as both a teaching activity as well as an educational leadership or research activity. This holistic approach can help bring more research stream faculty into OER work and could help drive culture change toward aligning teaching with research. This may require more effort and time from faculty, and providing institutional support—such as OER grants with course releases, evaluation expertise, and student assistants—is important to help make this approach successful.
- Find external opportunities and validation points within one's broader institutional and disciplinary communities. External opportunities—such as presenting at conferences, publishing journal articles, or connecting with leaders and peers in one's scholarly community—can help validate OER work for inclusion in tenure and promotion dossiers. It can also help drive cultural change within an academic or disciplinary community, which can help drive OER acceptance at the departmental level. Institutions can support this work by

creating formal, adjudicated OER awards, grants, and presentation opportunities.

- Partner with students and student leadership in advocacy around OER. Students are key stakeholders in teaching and learning and often recognize that OER, while free for use, requires significant effort on behalf of instructors. Students have institutional influence and can be effective in advocating for having OER work counted toward tenure and promotion policies and guidelines.
- Develop better metrics and shared practices for reporting OER impacts. While most instructors have access to download statistics and web analytics, these metrics are not often seen as robust or understood enough by tenure and promotion committees to capture and communicate the impacts of their work in a way that a journal's impact factors do. Being able to describe impact as well as metrics of use will help OER work be recognized for tenure and promotion. Individual and community information sharing may be an initial step; for example, communicating to the author of an OER how one has used it, and in what context, would allow them to have a better picture of the impact of their work.

## Case Study 6.

# Using Scholarship of Teaching and Learning and OER Towards Earning Promotion and Tenure at a Research 1 Institution

Brian Lindshield

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**Case study writer:** Brian Lindshield, Professor and Associate Department Head

**Institution:** Kansas State University, Doctoral University: Very High Research Activity

**Type of intervention:** Successfully using OER as part of tenure and promotions, working to change the culture around textbooks/OER.

## Background

Kansas State University is a land-grant institution that I joined in the fall of 2008 as an assistant professor in the Department of Human Nutrition (now Food, Nutrition, Dietetics and Health). It was a homecoming for me, as I earned my BS degree from the department in 2003 and grew up around 90 miles (145 km) from the institution. I was promoted to associate professor with tenure in 2014 then promoted to full professor in 2021. The tenure and promotion process is similar to other very high research activity institutions with research, scholarship, creative activity, and discovery (RSCAD), along with instruction and service being evaluated. There is variation between disciplines in RSCAD expectations, with them generally being higher in science disciplines. To be tenured and promoted, it is expected that the candidate be a proficient instructor and a contributor to service.

Most candidates meet these expectations, so RSCAD achievements in publications, grant funding received, success in mentoring/graduating graduate students, and whether a candidate has developed a thriving RSCAD program is often what determines whether a person is successful. I am also a cofounder and coleader of the Kansas State University Open/Alternative Textbook Initiative.

## Approach

I wanted to teach an intermediate-level nutrition course without a textbook, because I felt exploited by their prices as a student and swore I would never do the same if roles were reversed. After having students use a wiki to collaborate was not something that neither the students nor I thought was successful, I utilized what had been developed to create an OER in 2009–2010 in Google Docs as described previously (Lindshield & Adhikari, 2011). Despite my investment of hundreds of hours into developing it, the OER was viewed as instructional materials, not research, toward my tenure and promotion achievements. As noted in the background, whether right or wrong, RSCAD productivity was going to determine whether I earned promotion, since I was confident I could meet instruction and service/leadership expectations. Thus, given my effort and interest in OER, it became clear to receive credit toward tenure and promotion for this effort that I was going to need peer-reviewed publications related to it. I had never conducted educational research; an instructional designer at our institution helped me understand how to do this and made suggestions on where I should submit the first article. I had not conducted survey research that would make sense to support this type of scholarship, so I leaned on a department collaborator familiar with doing this and analyzing the results. We published the first article in 2011 (Lindshield & Adhikari) about the development of the resource and a small amount of survey data about students' perceptions of the resource. Through these and other experiences, I learned to conduct SoTL (scholarship of teaching and learning) research to produce peer-reviewed journal articles that were viewed as scholarly productively along my more traditional nutrition research efforts. In the end, I do not think I would have earned P&T without these publications. In 2013, when submitting my P&T materials, I had 10 peer-reviewed publications during my evaluation period with 3 being SoTL, including 2 published in the year before I was to be considered for P&T. Some of my nutrition research required years of effort to produce an article; SoTL was something that I could work on in addition to it and typically get to publication faster. The last SoTL article was one that I was actively trying to get accepted and published to include in my materials, and I submitted it to a journal that I believed might make a quick decision after a drawn-out review at a previous journal (Lindshield & Adhikari, 2013). I also

had written an invited editorial on OER and open access in nutrition and food science for a new open access journal that I was excited about publishing only to have them at the end inform me that I would have to pay article processing charges (APCs) to have it published after not mentioning that throughout the invitation or acceptance of the invitation process. Given that I felt it contributed to my overall tenure and promotion materials, I chose to pay the APCs to have it published (Lindshield, 2013).

Funding to start the Open/Alternative Textbook Initiative was first applied for in late 2012; further details about it have been described previously (Lashley et al., 2017). So it was very new when I submitted my materials for tenure and promotion. It was fortuitous that we had a small nucleus of faculty interested in this and funding available for us to get this started. The initiative provides grants to instructors who move from textbooks to open/alternative educational resources. It also administers a fee on courses that do not require students to purchase course materials.

When I applied for promotion to full professor, I had published three more SoTL articles and an OER book chapter for that evaluation period, and my OER SoTL research had garnered an impressive number of citations, which when compared to my more traditional research, helped to reinforce its value. I included where my citations ranked me on for OERs on Google Scholar and where my research interest on ResearchGate was higher than researchers in educational technology while doing the same for my traditional nutrition research. I was also selected as an Open Educational Resource Research Fellow, which was a great honor to add to my achievements. The one benefit of the editorial is that I think it might have contributed to my invitation to serve as an academic editor for a new open access journal *Current Developments in Nutrition* in 2017. This is an honor and has led to a variety of service/leadership opportunities beyond serving in the role.

One criterion that is utilized at my institution for promotion to full professor is that the faculty member should have a national/international reputation. My OER work/advocacy gave me an opportunity to make the case that I had achieved this in the OER field as well as in the nutrition field. The success of the Open/Alternative Textbook Initiative and getting the State/System OER Committee were positive nontraditional service/leadership achievements toward this criterion. However, there is a need for more OER-engaged faculty to reach tenured positions. For my suggested external evaluators of my materials, one of my suggestions was the only option who was a full professor at a similar institution and science discipline that could evaluate my OER/SoTL contributions.

The Open/Alternative Textbook Initiative All In funding we received in 2021 but had been chosen



as the next cause for late 2019 before it was postponed in 2020 because of the pandemic was like receiving a grant, since I wrote the application that was selected to be the focus area, and the amount raised was like a substantial research grant. While OER is not formally in T&P documents, there is a culture of less reliance on textbooks, with faculty members using OER, or not using any required purchased materials, than when I started in the department.

## Results

I have been successful in earning tenure and promotions while continuing my OER work. I think I have been able to change some minds about OER. For example, some instructors in my department have suggested to me unprompted that they would like to change to an OER, or not use a textbook, in the course they are teaching. However, the time involved has prevented some from following through with this expressed desire. With the initiative, I believe we have substantially raised awareness about OER at the institution. I think using OER is viewed as an option by most faculty here now, even though ideally, use would be higher than it is. We have not invested time into seeking P&T policy changes, because even if we were successful in doing so at the institutional/system level, it would likely take years before that filtered into department P&T documents.

I think the greatest gain in awareness has likely been at the system level. I asked to give a presentation on OER to system chief academic officers when I was the chair of the Council of Faculty Senate Presidents that was well received. This was a group of Faculty Senate presidents from four-year institutions across the state (I joined Faculty Senate wanting to advocate for OER at Kansas State University; I likely only became president because of my leadership related to OER and the Open/Alternative Textbook Initiative). There is now a System OER Steering Committee and OER was included in the system's latest strategic plan.

## Recommendations

- Be comfortable with breaking the mold. I had to meet expectations but did so in a different manner. I was willing to accept that there was some risk in me choosing to do this. Others doing something similar will probably experience this as well.
- Be prepared to make the case for the value of OER and the work you have done related to it. In my case, most were not familiar with it, and I am not confident that if I had not done this that

they would have appreciated the value of it. It may take repeated exposures and interactions for them to further understand/appreciate OER. I did not only make the case in my tenure and promotion materials.

- Learn to take satisfaction in small accomplishments that contribute to achieving something larger. I have become proficient in dividing large projects into small parts and setting goals to complete the small parts. This has allowed me to feel accomplished during the process rather than overwhelmed by the size of the total task.
- Take advantage of opportunities that come your way. You never know where they will end up taking you. I have had some wonderful opportunities that I never would have envisioned.

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## Case Study 7.

# Post-Tenure Review Values Variety of Open Education Activities

Alishia Huntoon

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**Case study writer:** Alishia Huntoon, PhD, Professor and Program Director

**Institute:** Oregon Institute of Technology: Public University

**Type of intervention:** This case study is about the post-tenure review process at my institution.

## Background

Oregon Institute of Technology is Oregon's polytechnic university. It is a public university offering professionally focused undergraduate and graduate degrees in engineering, health, business, technology, and applied arts and sciences. I am a professor and program director for the applied psychology program.

I have already been through the tenure and promotion processes. While there are no further promotion stages for me, I am reviewed annually and must go through a post-tenure review every five years. The post-tenure review is meant to encourage continuous faculty development. The process starts with a peer review, followed by evaluations from the department chair, dean, and provost. The criteria used to evaluate faculty performance are teaching, professional development, leadership and service, and professional integrity and cooperation.

At my institution, faculty choose their own course materials. There isn't a university-wide initiative

to encourage OER adoption currently. However, our library spearheads various OER-related activities. There is a small annual grant opportunity to encourage OER creation and adoption. I have been both a recipient and reviewer for this grant. Each year, the library hosts an OER review workshop, which I participated in. For the past few years, we have had sessions on various OER topics offered during open education week. This has ranged from being a few hours up to a day of presentations. I have both attended and presented during our open education week activities. Our institution is currently in the process of putting together an OER committee, as we do not have one.

## Approach

The previous five years have been the focus of my post-tenure review, which has also been a time of increased OER involvement for me in many ways. During this time, I built an organized group of activities centered around the development and use of OERs. My introduction to OERs was through a colleague that referred me to a grant opportunity to adopt an OER for our introductory course, which was a high-enrolling, thus high-impact, course. As this both led to grant funding and student benefit, my department saw this as a valuable activity. I included this in my annual performance evaluation (APE) several years ago. During my annual evaluation meeting that year, my department chair and I discussed how the grant for adopting an OER for our introductory classes was a notable activity. While I had it as a line item on my APE, we considered how to increase visibility on what I had been doing and what it entailed. We also discussed some work I had on the horizon related to OERs. I needed a better way to showcase that I had strategic and meaningful contributions to OER development and use. Just listing something as a bullet point among many wasn't going to help those that would eventually be reviewing my post-tenure portfolio understand the depth and breadth of my activities.

The APE form consists of three main sections. These correspond with the three primary categories that faculty are evaluated on for promotion, tenure, and post-tenure reviews. The first category is "Instruction," which includes items such as student evaluations of courses, courses taught, and development of instructional materials. The second category is "Professional Development," pertaining to the advancement of knowledge in a variety of ways, including publication, presentations, reviews, and participation in workshops. The third category, "Service," relates to both university and public service activities.

I like to keep things as streamlined and organized as possible, both for my audience and for myself. I

considered the criteria I would be evaluated on and considered what I could do that would contribute to my interests, OER needs, and the criteria. I sought opportunities that would match all of these as much as possible. Sometimes I would do something related to the instruction criteria, such as adopting or adapting an open textbook for a course. It might be creating open materials and sharing them. There were numerous opportunities available that fit the professional development criteria. This has included obtaining grants for adopting/adapting/creating, presenting at conferences, attending workshops, and publishing. The service criteria included reviewing OER materials in development and volunteering for conferences with duties such as reviewing proposals, reviewing prerecorded talks for accessibility and length, and hosting sessions. While I had several activities related to OERs for all three sections of my APE, I needed to showcase them in a clear and consistent manner.

The APE template includes a heading followed by a blank space for each criterion. The blank space is often filled in with bullet points, but there are no specific rules as to how this blank space should be filled in. What I ended up doing was creating subcategories for each criterion. Rather than just have all teaching activities listed under the “Instruction” heading, I created subheadings that structured my activities in a more cohesive and easier to understand manner. I included the headings of Delivery—Open Educational Resources, Delivery—General, Development—Open Educational Resources, Development—General, and General. For “Professional Development,” I separated the OER activities from the rest by having two subcategories: Professional Development—Open Educational Resources and Professional Development—General Activities. The “Service” section consisted of Department, Institution, Community—Open Educational Resources, and Community—General subcategories.

An example of how I classified an OER activity on one of my recent APEs was with a textbook creation project sponsored by Open Oregon. For post-tenure consideration, not everything needs to be connected to my classes or even discipline. Branching out and collaboration with others is encouraged. One of my latest projects is developing an open textbook for a university drawing course, which is not related to my field of psychology. I worked with a colleague to use my knowledge in OER development with his expertise in studio art to create the book. The development of the open textbook for drawing is related to the criteria of instruction, professional development, and service. There are many activities that relate to more than one criterion. In instances where this happens, I will choose the category that it best fits, based on the outcome of my involvement with that project. With the example of the drawing textbook, I chose to highlight it in the Professional Development category. I didn’t include it in the teaching category, as I wasn’t directly teaching with it, and teaching

was already my strongest category. I didn't place it in the Service category, though I did include in the Service category a conference presentation I gave related to the drawing textbook development. I placed it in the Professional Development category, as it was most relevant to that category and would have the most impact on my APE in this category. It showed advancement of knowledge, which didn't have to be in my discipline, and it was a grant-funded project.

## Results

My annual performance evaluations that have included OER activities have been overseen by two department chairs. They have both supported and encouraged my activities in this area. The updated organization and packaging of my APEs have made it much easier for evaluators to see the holistic efforts and contributions I made to the OER realm. It also made it easier for my department chairs to write up their annual evaluations of me, which have been consistently high, and I have not received pushback from anyone at my university.

My post-tenure review was evaluated by a five-member committee of peers, my department chair, the college dean, and the provost. I received an "exemplary" outcome at all stages, which is the highest level possible. Of note by all parties was my active involvement in OERs, which helped secure my "exemplary" outcome.

With my initial grant project to adopt an OER for our introductory courses, other faculty learned about OERs in the process. It was a relatively new concept at the time. When other faculty in my department became familiar with them and learned there are quality options that may include ancillaries, they became more open to considering and utilizing OERs in their classes. An example of this I previously noted was encouraging an art instructor to work with me on creating a drawing textbook. In recent years, our library has been offering educational sessions for faculty. One of the librarians is assigned the role of OER coordinator, which is encouraged and supported by the director of our libraries. Our university has the bookstore note if courses are using OER. With so much growth, education, and options, there have been more faculty both using and creating OERs for their areas of expertise. At the university level, the librarians have taken on the role of organizing educational opportunities for faculty to learn more about OER adoption and creation. They also have created and shared grant opportunities for those interested in adopting, adapting, and/or creating open materials. The librarians have done the most at my university to improve OER reputation and increase their use. They are currently in the process of creating a university-wide

community of OERs. At the policy level, discussion has just started about explicitly including OERs in P&T policies.

## Recommendations

- Track, document, and categorize everything you do from the start and as you complete activities. Big things are important, but every little thing adds up. Create, adopt, volunteer for committees/conferences, attend workshops/conferences. It's OK to start small and build as best works for you. Don't think the only way to get involved and have impact is to write an open textbook on your own.
- Think ahead of time about what activities you should be doing in the upcoming years to create a comprehensive and cohesive plan. Include activities that are meaningful, relevant to your position, valuable to your institution, and related to the criteria you are evaluated on annually and for tenure/promotion.
- Let others know what you are doing. Connect with people both close to you and outside of your program/department. Find out what others are doing. Collaborate and share. Look for OER-supportive organizations, such as Open Oregon (<http://www.openoregon.org>) in my state.
- Don't say yes to everything. There is so much energy, enthusiasm, and need in the OER community. It can be overwhelming. Choose to get involved in activities that both tap into your passions and are valued according to your institution's evaluation criteria.

## Case Study 8.

# Documenting and Formalizing: Practicing Open Education in the Language of the Academy

Stacy Katz

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**Case study writer:** Stacy Katz, Associate Professor, Open Resources Librarian–STEM Liaison

**Institute:** CUNY Lehman College, Master’s Colleges & Universities: Larger Programs

**Type of intervention:** By formalizing roles and structures and aligning open education with the institutional goals, I developed a mission-driven approach to seeking early promotion.

## Background

Lehman College is a senior college of the City University of New York in the Bronx, New York. It is designated as a Hispanic Serving Institution, and almost half of the student body consists of first-generation college students. Stacy Katz is the open resources librarian–STEM liaison, which is a faculty line within the library.

Within the CUNY system, librarians are required to have a second master’s degree (in addition to their master’s in library science) for appointment at the assistant professor level. In the tenure and promotion process, library faculty are evaluated on their scholarship, service, and their primary job function (which is considered equivalent to teaching for discipline faculty). The expectation at



Lehman College is that library faculty publish four to five peer-reviewed articles during their seven-year tenure clock, as well as present at national and international conferences.

Lehman College offers a variety of open education professional development opportunities for faculty. Offerings include workshops for faculty on OER, individual support for faculty looking to replace commercial textbooks and teach with OER, an Open for Anti-racism workshop, and support for faculty to create their own textbooks. As the open resources librarian, I contributed to the development and support of all the professional development offerings in open education at the college. I also serve on the CUNY OER Campus Representatives group. I created and continue to maintain the CUNY OER publications (<https://bit.ly/CUNYOERPubs>) list, which is a bibliography of research written by anyone affiliated with CUNY about open education to build awareness of scholarship in this area.

## Approach

When I first started at Lehman College, the job I was hired for was substitute science librarian at the instructor level. I had never held a faculty position before and had previously worked as a librarian staff member at colleges and an independent high school. I was appointed as an instructor because I was in the middle of completing my second master's degree. For appointment on the tenure track at CUNY, librarians must have a master's in library and information science and a subject master's degree. This is considered a terminal degree, as a doctorate is not required for library faculty. My initial appointment was as a substitute because the science librarian was taking a leave of absence. The position was potentially a temporary appointment and by no means what I would have considered as a career move for myself.

Just one month after I started as a substitute at Lehman College in the fall of 2016, the provost, Dr. Harriet Fayne, offered strategic initiative funds to departments at the college to advance the college's goals, which were Excellence in Teaching, Research and Learning, Enhanced Student Success, Greater Institutional and Financial Effectiveness, and Commitment to Engagement and Community Service. OER presented an opportunity to align with these goals and was submitted as one of the library's proposals for the strategic initiative funds. Some CUNY community colleges had started OER initiatives through the Achieving the Dream Grant, which provided evidence of the effectiveness of OER in reducing textbook costs for students. As a brand-new substitute librarian, I did not expect to lead the OER initiative. However, the chief librarian formalized this work by

convening an OER committee to review the proposals submitted by faculty interested in teaching with OER and designating me the chair of the committee. Through this leadership opportunity, my name was recognized on campus as I met with faculty interested in OER and presented to chairs and deans about the nascent initiative. Through these presentations, the OER initiative was grounded in the mission of the college.

In a case of fortuitous timing, Governor Cuomo announced funding for CUNY and SUNY to incentivize teaching with OER in the spring of 2017. This funding greatly expanded the ability to support teaching with OER by allocating far more than the seed money afforded by the strategic initiative funds. The expansion of OER at CUNY also convinced the library's Personnel and Budget Committee to shift the role from a science librarian to an open resources librarian–STEM liaison to recognize the importance of open education within the library. In 2018, the position was formally posted, and after interviewing, I was hired as the open resources librarian–STEM liaison at the assistant professor rank. By creating a role and committees, my OER work was formalized into the structures of academia and Lehman College. This formalization enabled me to include the role and committee chair on my CV and begin building my portfolio for tenure and promotion.

However, as a new faculty member without research training, the expectation of scholarly publications was incredibly daunting. Master's programs in library science do not typically prepare individuals to conduct research. We are taught about the structure of information in disciplines and how to search the scholarly literature, but there is not a course on conducting original scholarly research. In my master's of education in curriculum and instructional technology program, I started to align my assignments with my OER work. These projects provided a base to develop into the first manuscripts that I turned into publications. For example, I learned about Mezirow's transformative theory in a class about adult learning theory and wrote a paper about how it applied to open education for an assignment. I was able to then present on it at OE Global18 and publish a journal article entitled "Applying Transformative Learning Theory to Open Education" in the *Journal of Transformative Learning*. In the beginning, I was lucky enough to be able to ask for help from colleagues I had met through OER, such as political science professor Dr. Shawna M. Brandle.

At Lehman, the Library and School of Education developed a Research and Writers group to support junior scholars where faculty could bring draft manuscripts for supportive review. Bringing my publications to this group served two purposes, as I received feedback on my research-based manuscripts, and it also helped education faculty learn more about OER. This was a strategic move to get the assistance that I needed but also to educate and generate interest in OER. Education faculty

expressed interest in learning more about OER after reading my scholarship. I also learned more about their research and classes and was able to see where OER might fit into their courses.

Through Research and Writers, I initiated a fruitful collaboration with education professor Dr. Jennifer Van Allen. We created projects around her classes where she taught with OER and developed open education projects. For each project, we submitted presentations, publications, and grants to maximize the impact of everything we did. As faculty on the tenure track, we both needed to build our portfolio for tenure and promotion. Our research focused on open educational practices within teacher education and the benefits of renewable assignments for teachers and students. Our publication urging for OER in teacher education during the pandemic led to further conversations about how important open education is for all levels of students, not just within higher education. Education professor Dr. Sherry Deckman and editor of the *Journal for Multicultural Education* invited Jennifer and me to coedit a special issue of the *Journal for Multicultural Education*. Sherry's interest in OER also led to cofacilitating a professional development workshop for Lehman faculty called Open for Anti-racism. We have generated greater interest in OER from faculty curious about the ways that open can provide recognitive justice where Lehman students see themselves in the curriculum.

The funding from New York State for OER has continued and enabled numerous opportunities. I was able to travel to national and international conferences to present. The networks that I was able to build through these conferences helped me develop confidence as a practitioner and researcher. As an OER Research Fellow through the Open Education Group, I developed ideas for OER research and connected with other researchers from multiple disciplines. These connections were particularly useful later in developing my list of external reviewers for promotion, as those colleagues could speak to my portfolio and contributions in the field. I also developed relationships through my service commitments, which centered around committee memberships for OER at the college and university levels. I aimed for meaningful national and international services commitments by participating in the program committees for open education conferences, such as OpenEd in the United States and OER in the United Kingdom.

I learned more about research methods through the Institute for Research Design in Librarianship (<https://library.lmu.edu/irdl/>) and was able to deepen the complexity of my research. Through this research boot camp for librarians, my development as a scholar was supported and nurtured. My research focus has not wavered from OER and has explored a variety of aspects of open education, such as student perceptions of zero textbook cost courses or why faculty teach with OER.

My CV illustrated my activities—through primary function, scholarship, and service—at the college, university, national, and international levels. In my third-year evaluation, the chief librarian and the executive-in-charge of the School of Education agreed that the activities in my portfolio exceeded expectations and warranted consideration for early promotion. My personal statement centered on how open education is intrinsically linked to the mission of Lehman College and the City University of New York. The Personnel and Budget Committees of the library and the college, as well as the provost and president, agreed, and I was promoted to associate professor in 2023.

My role in expanding recognition in OER in tenure and promotion was not solely linked to my own work. As the open resources librarian, I provide formal documentation for faculty participating in the OER initiative. We notify department chairs when faculty participate in shifting a course to OER to ensure that their chair is aware that the faculty member is planning to teach with OER. This hopefully helps make teaching with OER an activity that brings value to their department and the college. I write letters of support for tenure and promotion portfolios for faculty teaching with OER. Using the formal processes of the college furthers the counting of OER as a scholarly activity for tenure and promotion. As an open education researcher, I maintain a bibliography of CUNY publications on OER. The articles in the bibliography have also been included as examples of scholarship of teaching and learning, which is another area of research that is gaining recognition within tenure and promotion processes.

## Results

Early promotion is not common within the library and is also rare across the college. The support from administrators demonstrates a growing appreciation for OER work across the college. The question moving forward is, How are OER activities recognized for discipline faculty? Including OER in departmental tenure statements and criteria is key for sustaining and advancing OER.

## Recommendations

- Align open education work with the mission of the college.
- Formalize roles, committees, and processes to demonstrate the work of OER in ways that are understandable within academia.
- Find mentors and connections who can be supportive and provide advice.

- Share scholarship on OER for feedback for submission and also to help colleagues learn more about OER.

## Case Study 9.

# Openness as Default: Open Education Practices Through Scholarship, Teaching, and Service

Michael Paskevicius

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**Case study writer:** Dr. Michael Paskevicius, Assistant Professor of Educational Technology, Department of Curriculum and Instruction, Faculty of Education

**Institution:** University of Victoria

**Type of intervention:** In this case study, I will advocate for the inclusion of open education as a criterion for tenure and promotion and document my own journey to connect openness to a formal tenure evaluation.

## Background

The University of Victoria is a public research university located in Victoria, British Columbia, Canada. The university is located on the traditional territories of the ləkʷəŋən peoples and the Songhees, Esquimalt, and WSÁNEĆ peoples whose historical relationships with the land continue to this day. The university has over 20,000 undergraduate and graduate students, is top ranked among Canadian comprehensive universities for preparing career-ready students, and is consistently highly rated in North America for international research collaboration.

The University Libraries have a commitment to open access publishing and scholarship with support and guidance offered by our Office of Scholarly Communication. Additionally, the Office of

Scholarly Communication partners with the Teaching Support and Innovation Centre to promote and support the development of open education through an Open Educational Resource Grant offered since 2019. The first round of this grant came with significant support from our undergraduate student union, which funded 50 percent of the total funded projects. More recently, the institution approved a project to develop an Open Hub for the university. The goal of this project is to acknowledge and celebrate open education initiatives across campus, engage students as future open scholars, and grow the culture of openness at the University of Victoria.

I started working at the university as an assistant professor in 2019 after working for many years as an educational developer and completing my PhD in Educational Technology. Joining a diverse department of faculty members engaged in educational research around art, curriculum studies, drama, literacy, math, music, science, social science, and educational technology, the notion and recognition of scholarship within the department is wide-ranging and inclusive.

To attain tenure and promotion from assistant to associate professor, faculty members must demonstrate that their teaching effectiveness and their scholarly activity meet or exceed the standards for the rank established by the faculty evaluation policy, the standard for the department in which the applicant holds an appointment, and the collective agreement negotiated by the Faculty Association. The expectation for professional activity typically follows a 40-40-20 time allocation, with 40 percent of a faculty member's time dedicated to research and scholarship, 40 percent toward teaching and graduate student support, and 20 percent toward service to the faculty member's department, faculty, wider university, and community.

## Approach

As an early career, tenure-track faculty member working within the Faculty of Education at the University of Victoria, I hope to both meet the criteria in attaining tenure and promotion while also promoting open education and connecting the principles of openness that I practice in my teaching and scholarship to the performance criteria identified in our tenure review policy. These connections to open education have not yet been formally established in our evaluation policy, which identifies teaching effectiveness, scholarly and professional contributions, service, and other contributions as measures of performance. I have taken a broad perspective on open education engagement that includes openness in scholarly activities, the development of open teaching activities and resources, as well as considering ways to bring openness into service where possible.

I do believe there are linkages to be made between these open educational practices and both the tenure evaluation criteria as well as the broader mission vision and values documented in our university strategic framework document. In particular, our strategic framework calls attention to advancing research excellence and impact as well as engaging locally and globally with communities through knowledge mobilization. I believe that engagement with open education serves these broader objectives through the wider dissemination of research made available through open publication and ensuring greater access to learning and knowledge generated at the university by making academic research and teaching materials accessible.

In engaging with open scholarship, I seek to ensure the research I publish is shared via open access publications. While tempted to seek the prestige of high-impact-factor closed access journals, I have been encouraged and mentored by colleagues who have made the case for publishing open access. Particularly in the field of educational technology, where we study the potential for technology to enhance access and quality of educational outcomes, publication by open access makes a great deal of sense. As well, in the field of educational technology, we are fortunate to have many high-quality and widely read open access journals. Fortunately, in 2019, the Faculty of Education adopted an open access policy that promotes and supports scholars who choose to publish openly, of which I was involved with creating. Importantly, publishing in this way has the potential to model to our students the values and possibilities enabled through open scholarship. This is even more important in our work with graduate students; the future academics, educators, and leaders who will carry the torch onto the next generation.

With an increase in the need for sharing of open data, I also shared two open data sets with support from our data curation librarian. Sharing of open research data strengthens the research communities' collective capacity to meet scholarly standards of openness by providing opportunities to further analyze, replicate, verify, and refine research findings is rapidly becoming an expectation for SSHRC or Tri-Agencies funded research (Government of Canada, 2012). While it is not clear that such a scholarly output is officially recognized in the tenure process, I believe it makes a significant contribution to scholarship, may increase validity through replication, and can also serve as a useful resource for graduate students who may want to use open data to develop their own research ability. One might look to further sharing artifacts of the research process that may support graduate students and emerging researchers, such as proposals, budgets, plans, ethics applications, research instruments, and so on. At this time, our policy does not.

With regard to teaching materials, some faculty members in my department have, for a long time,



practiced openness in sharing teaching artifacts. Rather than accepting the default of using the institutional learning management system, we maintain an open access WordPress site for each of our courses on which we share the learning resources that support our teaching using Creative Commons licenses. While it is important to reference one's local institutional policy on the sharing of teaching materials, in our context, I believe this serves several important purposes. First, students who take these courses maintain persistent access to their learning materials that can be easily found online, are searchable, and reusable. Second, these resources are available to both credit and noncredit learners, as well as to other educators who might want to integrate or remix them for their own teaching needs. Third, these WordPress course sites are used by several faculty members and adjunct instructors at the university who curate, update, and further develop the resource base. This has led to much collaboration and cross-pollination between faculty and adjuncts and ensures the resources are maintained and developed over time. While we have yet to conduct research on this approach, I do believe this has resulted in an improvement in the quality of teaching throughout these courses and at a minimum has led to more consistent and continuously improved design. One downside of this approach is that we are not publishing discrete OERs that could be more easily counted for merit but rather maintaining a collection of OER with ongoing updates and enhancements.

Contributions to service may be more challenging to connect to open education when developing one's tenure package. I do believe that maintaining a highly visible academic profile online and sharing both teaching materials and research openly helps create opportunities for external service. On internal committees, one may draw from, revise, or create OER in service to the academic unit or school. One may also encourage and assist in making the work of committees more visible by sharing outputs, maintaining websites, or engaging in other forms of open scholarship, thereby capturing the work done by committees.

## Results

While I have not officially submitted for tenure just yet, I am preparing my submission as I continue my work practicing open scholarship. I have found success in being reappointed to the department, a milestone toward achieving tenure, and used similar language as above to explain the value of openness in research, teaching, and service. The committee that reviewed my reappointment package did note in their feedback that the commitment to open access was considered noteworthy. My tenure application will contain references to the work done to advance open education in my scholarship, teaching, and service. This will be communicated by explicitly stating a commitment to

open access publishing, the use and development of OER as part of my teaching, the use of open educational practices, and a commitment to further developing openness in service roles by leveraging open practices and transparency.

One area of tenure criteria that has traditionally been more challenging to demonstrate is that of teaching effectiveness. Teaching effectiveness is often demonstrated through a teaching portfolio, student experience survey data, peer reviews of teaching, and engagement in professional development activities. In my experience, teaching materials have been undervalued, and I believe they should be showcased, celebrated, and shared. Engagement with open education and visible outputs of teaching materials shared as OER may be a valuable addition to a teaching portfolio and better demonstrate a commitment to developing teaching and the requisite teaching materials.

Being that specific tenure criteria define what is valued in the academy related to scholarship, teaching, and service, it would be wise to include aspects of open education, if that aligns with what is valued institutionally. Leadership is necessary to help align the mission, vision, and values of the institution to the desired actions and activities of faculty members. After all, early career faculty pay close attention to tenure criteria as they strive toward this important goal in one's academic career. I believe that recognizing open educational practices more concretely could close the gap between institutional goals and the tangible actions of faculty members.

In my experience, most academics desire to make their scholarship openly available. I believe that the principles of open education further accelerate scholarship through the addition of metadata, licenses, and persistent access, thereby making scholarship more discoverable and accessible. There is only a small additional step to advancing access to scholarship by further opening the door to important research and teaching materials curated by academics and institutions.

## Recommendations

- Lead and share your activities in open education with a commitment to knowledge mobilization. I have found that some faculty and those in academic leadership are not as receptive to the idea of licensing and discoverability, the technical bits. However, knowledge mobilization often resonates in the academy, and connections may be drawn to your university's mission, vision, and values.
- Socialize open education with your academic unit. In particular, talk to your chair or dean

about your goals and experiences with open education. As well, make sure to explicitly share with your students why you chose to use open resources or research and what that means for them and society at large.

- Find your open community within the university; they are to be found in the library, student groups, teaching and learning centers, and among other academic units.
- Join international networks and consortia. Organizations such as the Global OER Graduate Network (GO-GN) and the Creative Commons Global Network have been hugely supportive and can allow you to connect with open education allies beyond the university.

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## Case Study 10.

# OER Projects and the Community College Tenure Process

Angela Spires

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**Case study writer:** Angela Spires, English Professor

**Institution:** College of Southern Nevada

**Type of intervention:** OER Survey and Master Course Creation for use in Tenure Packet.

## Background

The College of Southern Nevada (CSN) is located across three campuses and additional off-site locations in Southern Nevada and has a student enrollment of around 30,000 students. The English Department is the largest department at the college. As a full-time faculty member, I teach a minimum of 15 credits in the spring and 15 credits in the fall as well as serve on multiple committees.

The tenure process begins the fourth year as a full-time faculty tenure-track member and starts with the formation of a three-person tenure committee. The tenure application is based on three areas: teaching, service, and professional development. The tenure committee reviews and evaluates the information and makes a recommendation to the faculty member's chair. The approval process then moves from the chair of the department through the ranks, finishing with the president of the university and then the board of regents.

The OER program is a committee of faculty members from the E-Learning department, libraries,

and educational faculty. The college partners with OpenStax and is trying out Libretexts as a platform to host free resources. In addition, the CSN OER committee offers grants for the creation of core courses using OER textbooks. I applied for and received the funding and created an English 100 Master Course that is housed in Canvas Commons with these funds. In addition, I run the OER subcommittee within the English Composition Committee. I have also helped adapt an OER textbook to CSN for our faculty to use.

## Approach

For tenure, our college requires three areas: teaching, service, and professional development. My work with OER was present in all of these areas in my tenure binder when I submitted it for review.

When I started at the college, I immediately joined the English E-Learning Committee because I had worked with Quality Matters (QM) since 2014 and had completed multiple online development courses through other institutions. The English E-Learning Committee was charged with evaluating online courses every five years, just like QM, and had created a rubric based on some of the fundamental elements of QM, but less extensive. After a year, I took over as chair of this committee. The pandemic happened in my second year of teaching at CSN, forcing everyone to go online. This is when I began looking closer at OER as a resource for students. I had used some OER in classes before but never as the primary resource. After some initial research, I found some OER materials. Then I looked for opportunities to use that material to make a larger impact in my department.

## Teaching

I applied for an OER grant to create a master course in English 100, our department corequisite course, which is five credits and is now the starting point for many students. The grant was an OER STEM grant for courses students are required to take. As students in Nevada no longer have a standardized required placement test for English (only a self-placement assessment) and no remedial courses for English are in place, English 100 is a course that needs a strong curriculum but also a course that many students take. To even the playing field for all students, as the university has a large minority student population, I felt creating a course with an OER was needed. Even though the grants were STEM-based, English 100 or English 101 is required for almost every degree the college offers. Since there are no more remedial courses, the number of English 100 courses had increased

significantly as the lowest-level required English courses. The course was created to help students all start the semester at the same point, with all the resources online, including their textbook. As part of the grant, I chose the OER textbook, created the course, and then offered training for adjunct faculty interested in teaching the course. Two adjunct faculty chose to teach the course I created along with me that first semester. The students in all of the classes were surveyed after the course. I was surveyed, and the two adjunct instructors were surveyed as well. After the successful completion of the English 100 course, and after reviewing survey results and implementing changes based on them, the course was polished and published in Canvas Commons so that anyone could use the course. After completing the grant and transitioning to OER in English 100, I began transitioning to OER in all my other courses. As I did this, I surveyed students to learn what they thought about OER. I began with an additional survey in my English 100 courses that were created for the master course. Then I moved all the courses I taught to OER except for one literature course that uses modern novels. So of the five English courses I teach, four of them are now OER every semester. I received 147 student responses to the OER survey in one semester and presented that information to the composition committee (see below). The CSN OER Committee even sent me a poster to hang in my office that states I saved students over \$7,500 in the 2021–2022 school year.

## Service

I chair the OER Committee, a subcommittee of the English Department Composition Committee. This committee came into being after the composition committee was reviewing textbooks, and I, along with a few others on the committee, suggested offering OER options to adjuncts and faculty. We talked to the chair about this, and we suggested OER options be reviewed. I, along with a few of my colleagues, reviewed all the options and suggested the top two for each composition course to be offered to faculty, including adjuncts as an option for the three composition courses offered. I presented information on the surveys from students who had used OER in the classroom. The results from the survey showed that students liked having a free option, found OER easy to use, and even preferred it over printed materials and e-books or were indifferent to which format their textbooks came in. Students also found that the integration of OER materials was easy to access and use, as it was listed in the Canvas modules with clear pages and links to readings. Seventy-five percent of students said they would like this option in more of their courses. With the main factors of cost, ease of use, quality of information, and integration into Canvas, the choice to use OER was clearly a desire for the students to have as an option. After the presentation of information and having OER

textbook recommendations for faculty to use in classes, the idea was presented for an OER committee to be formed. I volunteered and became chair of that committee.

As chair, I had members find new resources each semester and write a review of those resources to share with our department. In addition, we found an OER textbook that was open for adaptation, and we adapted the text to CSN. This adaptation included incorporating CSN links and information about student resources, changing references to align with CSN's location, and adding additional materials on synthesis, which I cowrote. We then made the textbook available to all faculty and set it as the primary OER for our English 102 courses. Students are able to access CSN resources within their own textbooks now in that class. Based on information from the department on our composition courses, we then moved forward with finding additional resources for English 100. Each semester, the committee finds new resources and supplies the department with OER choices for all faculty.

## Professional Development

To be an effective leader as the OER Committee chair and to continue to find OER resources, I wanted to resume learning about OER. I attended the Arizona Regional OER Conference in 2022. I attended multiple sessions and learned about what other colleges were doing with OER at their institutes. This helped me add ideas for the OER committee I chaired. The conference also offered information on licensing and housing of OER materials that I used to more fully understand how to know what was available for adaptation and what was not. The conference also gave me new places to look for OER materials.

I also completed a nine-week Lumen Circles course on “Teaching with OER & OER Pedagogies,” which offered examples and ideas of evidence-based practices and how to implement OER with those practices. In addition, it offered numerous links to find additional OER resources for all types of courses. It was an open course that required discussion and feedback with colleagues from across the country in different fields of study. This gave me the opportunity to see how they were using OER in the classroom and how I might use some of those ideas with how I currently use OER. Both of these professional development opportunities were shared with the OER committee, and the resources found were shared with them and other faculty within my department.

## Results

An OER committee is now in place, and more of our faculty are using OER in their classes. The OER committee gives updates at all faculty meetings and is now a regular part of planning in the composition committee within our department. In addition, there is now an OER option for adjuncts to use, which they did not have before. New OERs are now reviewed every semester and work to adapt texts and even write and publish texts for department use is in the works. There is an English 100 course in Canvas Commons that can be accessed and used by any adjunct faculty. In addition, more master courses using the approved OER texts are in the process of being created.

I was able to use work with OERs for all three areas that our college requires for tenure. When my tenure chair viewed my packet, she highlighted “Received a STEM Master Course grant, which allowed her to create an online English 100 course using OER resources, which she then offered to our adjuncts” to the school when requesting letters of support. I also had quotes and evaluations from students that mentioned my use of OER. An online course evaluation was completed for my tenure committee, and my use of OER was noted in this evaluation. In addition, my committee work was highlighted in recommendation letters for the approval process with my tenure application—especially the adaption of the textbook to make it specific to CSN and include CSN resources, links, and local information—and being chair of the OER committee, which continues to supply the department with updates and reviews of materials as we find them. It also helped me procure letters of recommendation from outside of my department from the head of the E-Learning committee, which serves on the college OER Committee. Outside letters helped showcase my service to the entire college and not just my department. My tenure was recommended by the president in February 2023 and approved by the Board of Regents in March 2023 to go into effect on July 1, 2023.

## Recommendations

- Be active on service committees that use/explore OER and make recommendations to help change current policies or benefit students.
- Network with other OER users to gather outside support for your tenure application.
- Gather student data from surveys or other research methods to support initiatives to bring OER into the forefront of the educational experience.



- Learn about OER procedures, licensing, best practices, and how others use OER in their fields and on their campuses to help expand it within your department.

## Case Study 11.

# OER and OER-Enabled Pedagogy Through the Lens of the Mission and Core Values of the University

Nicolas P. Simon

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**Case study writer:** Nicolas P. Simon, Associate Professor of Sociology

**Institution:** Eastern Connecticut State University: Public University

**Type of intervention:** Framing open educational resources (OER) and OER-enabled pedagogy through the lens of the mission and core values of the university.

## Background

Eastern Connecticut State University (<https://www.easternct.edu>) is the only public liberal state university of the Connecticut State Universities and Colleges (<https://www.ct.edu/>) (CSUC). The CSUC system is composed of four state universities, 12 community colleges, and an online institution. Eastern's pedagogical mission is to provide a liberal arts education "practically applied" to all our students. Eastern is a member of the Council of Public Liberal Arts Colleges (<http://coplac.org/>), an organization promoting the value of liberal arts education in student-centered residential institutions. Our institution also focuses on undergrad research and employability. At Eastern, I am an associate professor of sociology in the Department of Sociology, Anthropology, Criminology, and Social Work. This case study describes what I did to receive tenure and promotion in 2022 and what I am currently doing to prepare my application to become a full professor.

At Eastern, tenure and promotion includes four categories: Teaching, Creative Activity, Service, and Professional Activity. Eastern has a mission to provide students with a transformative learning experience; therefore, Teaching takes on the most important categorical role in the promotion process. Of course, Scholarship and Creative Activity is valued as a close second by the faculty and administration in order to promote academic excellence.

At Eastern, individual faculty and some departments included OERs in the curriculum. Our institution is looking at ways to support OER adoption, training, and assessment. In my tenure and promotion (T&P) package, I frame my use of OER and OER-enabled pedagogy (OEP) through the lenses of the university's mission statement and core values as well as the senate bill [PDF] ([https://www.easternct.edu/university-senate/\\_documents/SB-1415-9CleanVersion.pdf](https://www.easternct.edu/university-senate/_documents/SB-1415-9CleanVersion.pdf)) that delineates our requirements for tenure and promotion.

## Approach

To ensure my work in OER was accepted and valued by the university, I closely aligned my activities with the university's core values and the university's mission statement. By positioning the OER activities so that they correspond with the values of the university, I demonstrated the validity and worth of these projects to the P&T committee in a language they understood.

At Eastern, inclusion is one of our core values. Our institution provides “educational access while building a campus community that embraces diversity and differences.”<sup>1</sup> In order to address accessibility, I ensured that my teaching narrative in my application describes how OER are inclusive of every student's socioeconomic status and learning style. I started my narrative by stating that commercial textbooks are so expensive that some of our students are not able to buy them, and that exclusion affects not only their academic performance in the course but also how they perceive themselves as students. I also correlated institutional values to the importance or the worth of OER. For example, I stated that OER save money for every student and that low-income students are the ones who benefit the most from these resources. Additionally, in my narrative, I included my assessment of their cost savings as well as some of their comments collected during the semester to support my claims. Many of their quotations were similar to the following one: “OER significantly

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1. See Eastern Core Values (<https://www.easternct.edu/about-eastern/mission.html>).

eases my financial stress. If every class I took used OER, I would save about one month's rent per semester. Every class that uses OER allows me to work fewer hours so I can concentrate more on my education.”

### Student savings per course since starting using OER

*Introduction to Sociology* (use OER since spring 2018):

$$626 \text{ students} \times \$116.94^2 = \$73,204.44$$

*Sociological Theory* (use OER since spring 2021):

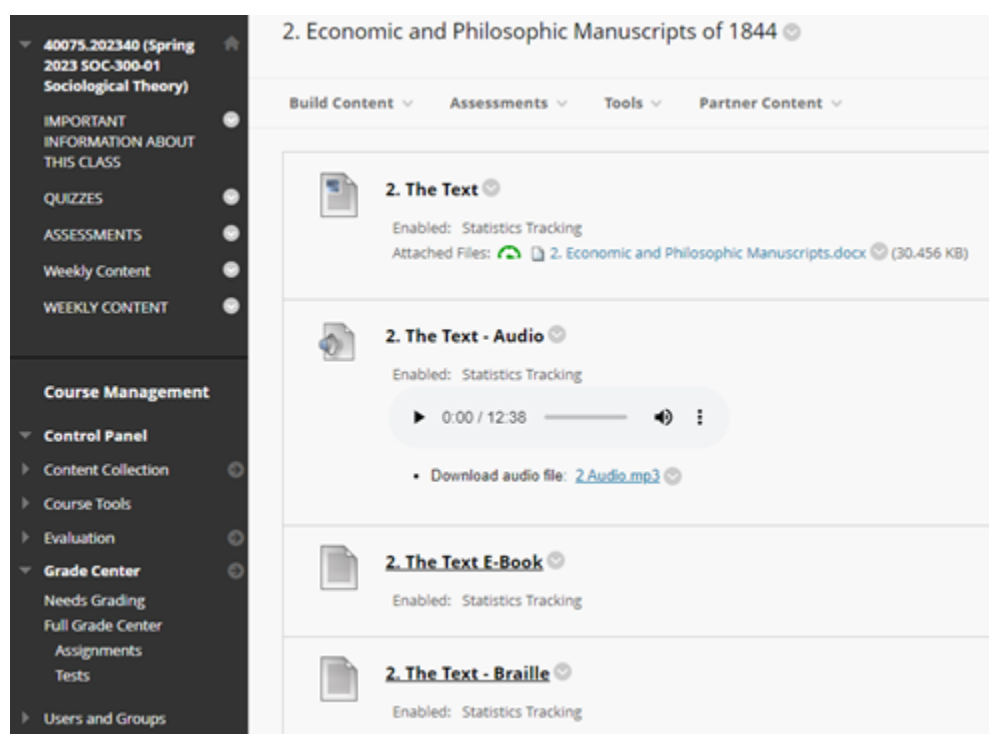
$$93 \text{ students} \times \$116.94 = \$10,875.42$$

Total savings: \$84,079.86

Inclusion as an institutional value also implies the support of various learning styles as well as accommodating students with accessibility needs. In my teaching narrative, I discussed my use of openly licensed course materials in different formats to respect the learning style of every student. In Blackboard, the learning management system that we use, students can find a digitally accessible version of the course materials, which supports the educational experience of students using a screen reader; an audio file, which benefits the audio learners; and a braille file, which benefits visually impaired students.

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2. To quantify the saving, I used the estimated cost of textbooks developed by the Scholarly Publishing and Academic Resources Coalition (SPARC) in their web page: A New Method for Estimating OER Savings (<https://sparcopen.org/news/2018/estimating-oer-student-savings/>). In 2018, SPARC “found...that on average, students save \$116.94 per course when OER is adopted in place of traditional textbooks.”



Engagement, as another one of the university’s five core values, is also emphasized in the university’s mission statement: “Eastern engages students from diverse backgrounds in a transformative, liberal arts learning experience.”<sup>3</sup> Engagement is defined as developing our student learners “intellectually, creatively and socially” through learning experiences that involve both “individual and collaborative research” as well as active and reflective learning.<sup>4</sup>

In my teaching narrative, I explained that I use OEP to help students be engaged academically and socially when creating OER. Working together in teams, my students and I created a test bank, wrote PowerPoint lectures, and selected YouTube videos to illustrate sociological concepts and theories for the textbook *Introduction to Sociology, 3rd edition* from OpenStax (<https://openstax.org/details/books/introduction-sociology-3e>),<sup>5</sup> and the anthology *Classical Sociological Theory and Foundations of American Sociology* (<https://open.oregonstate.education/sociologicaltheory/>), edited by Allison Hurst.<sup>6</sup> Through this work of creating material for future sociology students, my students mastered the

3. See Eastern’s Mission Statement (<https://www.easternct.edu/about-eastern/mission.html>)

4. See Eastern’s Core Values (<https://www.easternct.edu/about-eastern/mission.html>)

5. Some of the test bank’s questions and the PPT are hosted on the OpenStax website. The video references can be found in GoOpenCT (<https://goopenct.org/courseware/lesson/1145/overview>).

6. If you are interested in these materials, please email me.

material intellectually, as well as worked with one another collaboratively to brainstorm, draft, and edit the OER products.

Consequently, because of their investment in their academic work, I made sure to point out in my P&T material that the student *engagement* derives not only from their in-class social connections but from their awareness that they are creating openly licensed academic products that serve a greater audience. For example, during the pandemic, when my students worked with the Center for Community Engagement at Eastern to create educational videos for K–12 students of the local community,<sup>7</sup> they demonstrated the institution’s value of active and engaged learning. They understood the importance of the resources they were providing others and took their work seriously.

In contrast to traditional methods of teaching, OER-enabled pedagogy requires students to create knowledge rather than be passive recipients of the knowledge I give them. Because OEP differs from traditional methods of teaching, the responsibility was on me to explain OEP in my promotional material, to provide my audience with examples, and also to collect data to show how this teaching method promotes social and creative engagement. I copied quotations from students’ end-of-the semester reflection essays and incorporated their quotations as evidence of their greater course involvement than regular classes. Students chiefly identify their greater engagement due to knowing their work will be shared with others. As one student expressed, “I viewed this a particularly valuable experience because it was a form of learning I haven’t had in any other course. From a student perspective, this form of education centers more on applying yourself based on the knowledge you’ve learned as opposed to memorizing and matching terms as many other courses do.” The more the students trust that their work will be shared with others, the more effort they put into these projects.

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7. You can find these video in the Eastern Center for Community Engagement YouTube page (<https://www.youtube.com/channel/UCKsfl7PKLyMgAZKh07l5Sow/videos>) and playlists (<https://www.youtube.com/channel/UCKsfl7PKLyMgAZKh07l5Sow/playlists>).

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In addition to matching the OER work in the classroom with the university's mission statements, I carefully aligned my work in OER with the categories from our senate bill [PDF] ([https://www.eastrnct.edu/university-senate/\\_documents/SB-1415-9CleanVersion.pdf](https://www.eastrnct.edu/university-senate/_documents/SB-1415-9CleanVersion.pdf)), clarifying requirements for P&T. Searching under the categories of Creative Activity, Service to the university, and Professional Activity, I strategically coordinated my activities with the specific language given in our senate bill.

For example, one criterion under the category of "Teaching" indicates "mentoring student research toward presentation of completed work." Because I have taken several teams of students to OER conferences over the past four years, I have ample data to show how I educated and guided students to discuss their experiences creating OER in the classroom. Mentoring this next generation of OER advocates, I have prepared students to present at conferences,<sup>9</sup> speak in panel discussions,<sup>10</sup> or write blog posts.<sup>11</sup> These opportunities provide them with professional experiences to include on their

8. You can find these video in the Eastern Center for Community Engagement YouTube page (<https://www.youtube.com/channel/UCKsfl7PKLyMgAZKh07l5Sow/videos>) and playlists (<https://www.youtube.com/channel/UCKsfl7PKLyMgAZKh07l5Sow/playlists>).

9. We presented in different conferences, including the 2020 Open Ed conference ([https://www.youtube.com/watch?v=\\_7J8ihS6VbE&feature=youtu.be](https://www.youtube.com/watch?v=_7J8ihS6VbE&feature=youtu.be)).

10. Like in the 2020 CSCU OER Summit (<https://youtu.be/btf0NNpow9I?feature=shared>), the 2022 Equity Imperative: Open Education in New England (<https://www.youtube.com/watch?v=FZQy5D6XcEk>), or the 2022 Texas Digital Learning Summit (<https://oertx.highered.texas.gov/courseware/lesson/3615/overview>).

11. My students and I wrote a blog post "Presenting and Promoting Open Pedagogy Through Different Frameworks" (<https://library.ctstate.edu/c.ph>

résumé, or they prompt them to consider graduate work, but perhaps less obviously, these research presentations on OER shape their principles about open access materials. For example, during the 2020 Open Ed Conference, two of my students and I discussed the creation of educational videos for the K–12 local school district. We argued that service learning and OER shared fundamental practices by sharing resources as a way to enhance communal ties. As I mentored these students in OER projects such as these, I helped them absorb one of the key tenets of sociology as a discipline: how social processes shape human lives. Thus, I indicated in my material how my mentoring students helps them both professionally and personally to think sociologically.

In the P&T category focusing on “Service,” I drew attention to the criteria: “Presenting demonstrations, workshops, and panel discussions or providing consultations for the university community.” For this category, I described how I educated colleagues about OER from our 17 institutions of the Connecticut State Universities and Colleges (<https://www.ct.edu/>) (CSUC). Years earlier, I joined a team that created the Open CSCU Blog (<https://cscu.libguides.com/findoer/blog>) to promote and discuss the work of faculty who are using OER and OEP.<sup>12</sup> I also created a monthly virtual Sociology OER Open Café for any sociology instructor interested in discussing topics related to OER and OEP.

Finally, in the last category of the P&T criteria outlining the requirements for “Professional Activity,” I described my participation in the Northeast Regional OER Summit (<https://neer.umasscreate.net/>) to coincide with the category’s language: “Membership and service in appropriate professional organizations.” Northeast Regional OER Summit is a multistate collaborative event for OER advocates who want to learn and share effective practices in awareness building, implementation, collaboration, strategy, and research. For this summit, I assisted in soliciting proposals, recruiting reviewers and providing them with proposals, writing acceptance letters to speakers, and creating the schedule of the conference. By carefully outlining the work I do for such professional events, I educate the P&T committee on the academic nature of OER conferences and initiatives.

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p?g=1337691&p=9858040&t=120974)" to explain how to frame OEP through the frameworks of social justice, liberal arts, and employability.

One of my students went farther and wrote another blog post describing her own experience as a teaching assistant. I included the first blog post in the Creative Activity part of my T&P application and the two blogs in the mentoring section of the Teaching part.

12. Read the story of the creation of the CSCU OER blog here: OpenCSCU and the Evolution of Open Communications in Connecticut State Colleges & Universities (<https://nebhe.org/journal/opencscu-and-the-evolution-of-open-communications-in-connecticut-state-colleges-universities/>).



## Results

As a result of my commitment to OER and OEP, I received tenure and promotion in 2022, and I continue my work in order to obtain promotion to full professor. For example, I am currently writing a translation for the Creative Commons Certificate Program (<https://creativecommons.org/2023/01/06/creative-commons-cc-certificate-available-in-french-and-spanish/>) that educates instructors and librarians on attribution licensing practices. I will defend this translation work as an example of “Creative Activity” (i.e., “Scholarship”) in my promotion material because of its impact and its importance as a cross-cultural document.

## Recommendations

For those applying for P&T, these are my recommendations:

- Ask the members of your department and the tenure and promotion committee what they think of OER and OEP. As you ask them questions about the expectations of tenure and promotion, be sure to help them understand your work. Do not wait until putting together your promotional packet to hope they will understand. I did not do that before applying for T&P. This recommendation is the fruit of the conversations I had with my colleagues after they read my application.
- Read the mission or vision statement of your university carefully, as well as any statement of values. Find ways to connect OER and OEP to the mission statement, vision, and core values of your institution.
- Use OER-enabled pedagogy to create new OER with your students. Determine the service requirements for tenure and promotion, and find ways to promote OER on your own campus. Write blog postings or book reviews of OER material. You do not need to write scholarly articles in OER, just participate in the conversations. Join local or national OER groups or conferences. It may provide you with some writing opportunities, as well as constitute your professional service for promotion.

## Acknowledgments

I would like to thank the reviewers for their thoughtful comments, especially Merinda McLure and Shannon Smith. I also would like to thank Kevin Corcoran, who has been my mentor in the OER community and the architect of many OER initiatives in the State of Connecticut. Finally, I would like to thank Miriam Chirico for all of her support in my journey in American Higher Education.

## PART II

# CHANGING IMPRESSIONS, CULTURE, AND POLICY

The case studies in this section focus on creating college and university level change around the value that OER work carries in the tenure, promotion, and reappointment process. Although many of the authors in this section have been OER practitioners themselves and used that work in their own journeys to promotion and job security, the authors are primarily working with other faculty and administrators at their institutions to build policy and processes that legitimize OER work so that it can be made legible to those who make decisions about tenure, promotion and reappointment.



## Case Study 12.

# Steps to Making OER Count Using The Boyer Model and the DOERS3 Matrix

Kelly Arispe

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**Case study writer:** Dr. Kelly Arispe, Associate Professor of Spanish

**Institution:** Boise State University, a doctoral university classified by high research activity and community engagement

**Type of intervention:** This case study will provide insight into using the OER Contribution Matrix with the Boyer's Model of Scholarship for evaluation as well as highlight an aspect of OER ancillary materials that are even less understood and recognized by institutions.

## Background

Boise State University (BSU) is a metropolitan research university in the rural state of Idaho. I am an associate professor of Spanish and an applied linguist and teach undergraduate courses in Spanish and world language pedagogy and direct an online graduate certificate. In addition, I maintain an active research and service load commensurate with a doctoral university.

Currently, the criteria for promotion and tenure (P&T) are the traditional tripartite categories of teaching, service, and scholarly creative or research activities. University policy recognizes Boyer's Model of Scholarship (BMS) according to (1) discovering knowledge, (2) integrating knowledge, (3) applying knowledge, and (4) scholarship of teaching, although the BMS is restricted for P&T application to research only. The university provides a web page with descriptions and examples for

how faculty can communicate their work according to BMS;<sup>1</sup> however, open educational resource (OER) is not listed explicitly, and no guidelines or rubrics exist to support committees evaluating the merits of OER activities.

In 2019, BSU received state funding and granted 30 OER projects across campus to “encourage experimentation with OER...and grow our academic community’s awareness of how OER can complement or replace expensive teaching and learning resources.” I am the codirector of the Pathways Project (PP), which is a repository of more than 900 ancillary materials for world language teachers and was a recipient of this funding. Currently, I am participating in a university OER development series program where I am creating a Spanish conversational OER textbook to offer affordable access and enhance interaction and diversity in learning, which are critical to the Spanish program learning outcomes. As such, I am working with university leaders to create guidelines to evaluate OER activities for equitable integration in the P&T process. However, this case study is focused on my PP OER activities only.

## Approach

### The Institutional Context and Challenge

I primarily characterize my intellectual impact through high-engaged scholarship and community engagement that is fundamentally rooted in OER and open educational practices (OEP) with K–16 language teachers. Community engagement is a Carnegie distinction at my institution as well as one of the key pillars for the university’s strategic planning. I am applying for promotion next academic year and am working with university leaders to create rubrics for P&T committees that currently have no metric to evaluate OER activities included in the faculty portfolio. Furthermore, faculty have no guidelines for how to communicate evidence for OER-BMS alignment in their narrative, which is critical in helping make this work visible, equitable, and therefore, sustainable.

This case study highlights the process for creating both a guideline and rubric for OER activities according to the BMS specific to the Scholarship of Application, a category where I have

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1. The Boyer Model of Scholarship at Boise State University (<https://www.boisestate.edu/academics-deptchairs/tenure-promotion-overview/the-boyer-model-of-scholarship-at-boise-state-university/>)

demonstrated leadership and scholarly distinction. It is unique because it presents a case for OER research through the creation of non-textbook-related OER materials. In doing so, I propose a process and provide examples of how OER activities of *all* types can be aligned to standards of research evidence and evaluated equitably according to clear criteria.

## High-Engaged Scholarship through Community Engagement with OER

PP is a repository of over 900 high-quality, standards-aligned OER classroom activities that support and engage the K–16 world language teacher community in OEP and on a global scale. This repository was built because of a needs-based assessment I conducted with the K–12 local teacher community in 2016 and 2017. The PP was founded in 2018 and has now grown to a community of more than 350 faculty, staff, and students who participate in OEP (to differing degrees) to impact the teaching and learning of 10 world languages across three levels of proficiency.

In addition to internal funding awarded in 2019, the PP received state funding in 2020 to pilot a case study in OEP to train teachers to retain, reuse, and revise PP materials. This served as proof of concept within a longitudinal design-based research framework. At the end of 2021, I was awarded a \$100,000 National Endowment for the Humanities (NEH) Level II Digital Humanities Advancement Grant (DHAG) to evaluate teacher practices in the five Rs of OEP to retain, reuse, revise, remix, and redistribute PP materials. With my codirector, we led a cohort of 6 K–12 language teachers primarily in urban districts in the fall of 2022 and a spring cohort of 10 language teachers primarily in rural districts across the state of Idaho. In addition, I integrated the PP into two undergraduate and two graduate courses focused on world language theory, methodology, literacy, and assessment. In these courses, preservice and master's students also engage in OEP and showcase the evidence of their work in their final professional portfolio. Furthermore, they are encouraged to use the PP activities in their field experiences in K–12 schools and, in so doing, are OER ambassadors by helping onboard their mentor teachers who benefit from the PP materials and learn how to locate and implement them for future use.

Finally, I am frequently invited to deliver local, regional, and international workshops and presentations to train in-service K–12 teachers on retaining, reusing, and revising PP materials for their learning contexts. In the last three years, I have delivered 36 workshops/presentations nationally and internationally. In addition to this work, I have coauthored peer-reviewed and praxis-oriented

papers in open journals and coauthored a piece in a highly visible educational blog read by the teacher-educator community. Furthermore, the NEH award will contribute to several community-informed products, including a guide on how to lead community-engaged OER projects to impact teaching and learning at the K–12 levels.

In the following section, I explain the process I use for (1) communicating evidence to justify my OER as scholarship and (2) evaluating OER using a rubric aligned to the Scholarship of Application, which is a domain of the BMS. I contextualize the degree of success in the rubric according to high-engaged scholarship informed by Franz (2011).

## Making the Work Visible and Measurable

One of the compelling reasons I joined my institution is for what is popularly known as “blue turf thinking”—a brand platform and a vision statement wrapped in one that was coined thanks to the unique color of the football field. “Blue turf thinking” is a way to say the university is committed to innovation and thinking outside the box. One of the challenges with innovative work is to ensure that policies and structural mechanisms within the university can support the rate of change that comes with innovation. This is one of the issues that confront BSU as it relates to the sustainability and quality of OER being produced. Faculty who engage in OER scholarship find it intellectually rewarding, and they know OER research benefits learning above and beyond affordability, which is the single greatest driver for institutional OER initiatives. And while there are many innovative leaders at BSU driving important philosophical and ideological conversations related to P&T and the BMS, the reality is that there must be a pragmatic approach to supporting faculty now. The litmus test for success in the short-term, and the approach I have taken in this process, is to consider what a non-OER faculty member would need to (1) understand the work according to the university standards of scholarship and (2) rate the work using a scale that aligns with the university strategic plan for community engagement and map to the Scholarship of Application according to the BMS. The rationale for using the BMS is that it is more holistic and inclusive of the integrated nature of my work in OER. Currently, there are scarce resources that include other types of OER activities like the PP, and this case study contributes both a process and evaluative material that can make OER community-engaged scholarship visible and measurable.



## Step 1: Use the DOERS3 Matrix to Communicate Your Work

The DOERS3 matrix is helpful in identifying how one's work aligns with teaching and service, and it helps faculty consider how to collect evidence for the adoption, adaptation, improved learning, and community categories in the matrix. In this way, the matrix can be an excellent reflection tool for faculty early in the P&T process; faculty who want to talk about their work with their chair and/or P&T committees for annual or periodic review can use the matrix to guide the discussion. For example, I requested letters of support from administrators and teachers in the community who directly benefited from PP workshops and presentations. The letters address the impacts she has made as an OER leader in the K–12 community in the state.

## Step 2: Clearly Identify Evidence according to Standards of Scholarship

One way the DOERS3 matrix can become more inclusive of *all* OER-related projects is to think through evidence pieces related to tracking impact through usage. For example, faculty can document how their OER materials are being used by others in the larger, external community. Working with website tracking and data analytics, I have recorded the number of times a PP activity was revised or remixed as well as the number of times the project has been accessed and where (by city, state, region, etc.). These metrics are helpful in characterizing the adoption and, when possible, adaptation of OER materials for committee members, and they can help faculty chart these impacts over time.

The DOERS3 matrix may not be as helpful when it comes to the *create* category and specifically with presenting a case for OER as research. Indeed, this is often the pressure point for faculty doing high-engaged OER scholarship. At best, the matrix makes clear that creating OER *can* be a form of scholarship. However, in my context, there are no university guidelines that explain how creating OER counts as research, nor are there rubrics that support a clear and equitable evaluation process. This is particularly problematic for faculty who will be evaluated by peers (departmental and/or college committees) who have a general or simplistic understanding of what OER are. Often, non-OER creators/engagers tend to limit OER activity creation to teaching and service categories only.

At my institution, there are clear standards of scholarship that, although not explicitly worded within P&T policy, are strongly encouraged to be applied in the BMS evaluation process. As such, I use these standard criteria from our university website to communicate the process and/or document evidence

as a rationale for their merit as scholarship. In the following table, the column on the left contains the eight standards of scholarship according to the BMS, and the column on the right is where I include examples or detailed evidence related to the creation of OER.

**Table 1: A tool to map faculty-created OER to standards of research.**

<b>BMS standards criteria</b>	<b>PP OER examples and evidence</b>
Clear goals	Teachers and students participate in the Pathways Project and come from different fields of study and schools across the globe to create open, digital activities that support the teaching and learning of world languages and promote intercultural competence.
Adequate preparation	1. Needs assessment to identify and prioritize biggest challenges and obstacles to aligning and delivering best practices in world language teaching across K–16 levels 2. Create a template for activities that integrate world language national standards, student-friendly (can-do) learning outcomes, teacher-friendly instructions, all material links with editable versions, open licenses, clear descriptions, and tags to improve online searchability 3. Create professional development materials (slide decks, on-demand video presentations, and online workshops) to train the OER PP team (undergraduate students, faculty, staff, and in-service teachers)
Appropriate methods	Design-based research (DBR) methodology has informed exploration, pilot, and enactment cycles that allow the researchers, teachers, and design team to make incremental changes through multiple iterations that improve both the OER materials produced as well as the data collection and analysis.
Significant results	Program evaluation and mixed-methods research data collection upholds Institutional Review Board requirements, testing validity, and reliability of data analysis. Usage data/analytics demonstrate that the goal of the project is being met.
Effective presentation	Multiple ways of accessing PP materials: website, OER Commons, Pressbooks, Scholarworks. All publications and presentations are open access and are shared via the website and Scholarworks.
Reflective critique	The DBR is a methodology that integrates reflective critique in its design. Multiple iterations propel improvements/adjustments that are responsive to constructive critique and user needs.
Public dissemination	Multiple publications and presentations nationally and internationally disseminate PP activities, professional development products, as well as research findings.
Peer review	Publications and presentations are peer-reviewed. PP activities are retained, reused, revised, remixed, and redistributed by a global teacher education community.

One of the potential challenges in advocating for OER as scholarship is with regards to peer review. In meeting with administrators and faculty leaders across a vast spectrum of units at my university, I

encountered a great range of perspectives regarding the merits of peer review in the first place and not just specific to OER. For example, one leader argued that community-engaged scholarship shouldn't be limited to traditional notions of "peer review" but that high-impact community-engaged scholarship must reflect the rigor of standards specific to and in concert with the community. Thus, this criterion (peer review) should, at the very least, be inclusive of a broader definition.

Precisely because many OER materials are self-published independent of editorial contracts, the onus can frequently fall on the faculty member to request or seek out peer review. Fortunately, my institution has recently catalyzed an OER development series with five pathways where faculty can participate in OER and receive support (mentoring and a stipend). One of these (pathways) provides a process for faculty to receive peer review for an authored textbook. At any rate, it is important to recognize that most faculty are bound to evidence of peer review, and each faculty member must determine early on how they will account for it in their narrative.

### Step 3: Remix a Rubric If No Rubric Exists

One of the most challenging aspects of working with the BMS framework is anticipating how one will be evaluated in the absence of clear criteria or rubrics. Integrated research (referring to the BMS domains) has a crossover with traditional categories that have been entrenched, for better or for worse, in the university ecosystem and within the academic psyche. For this reason, it is imperative to delineate the degrees to which OER meet or do not meet scholarship standards. I identify my PP OER research as Scholarship of Application within the BMS domain and refer to my community engagement as high-engaged scholarship (Franz, 2011).

In my quest to adopt a rubric that can help me self-evaluate my progress, I draw from the University of South Florida's community-engaged tool kit (Jordan, 2007) and adapt it to OER community engagement according to the university scale that is already used to evaluate faculty workload. I plan to include this rubric alongside the tool (Table 2) that maps the PP to standards of research.

## OER Community Engagement Rubric

Each category can be assessed as

- Does not meet expectations
- Meets expectations (scholarship<sup>2</sup>)
- Exceeds expectations (high-engaged scholarship<sup>3</sup>)

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2. Scholarship is defined by Franz (2011) as “original intellectual work communicated and validated by peers.”

3. High-engaged scholarship is defined by Franz (2011) as “engagement with communities that integrate scholarship in the process.”

**Table 2: OER Community Engagement Rubric**

<b>Evidence of High-Engaged Scholarship</b>	<b>Description</b>	<b>Assessment</b>
Clear academic and change goals	<ul style="list-style-type: none"> <li>• Communicates the purpose of the OER and its need for the public good</li> <li>• Defines goals and objectives that are achievable</li> <li>• Identifies questions of inquiry in the discipline and in the community</li> <li>• Articulates research objectives</li> <li>• Articulates goals for teaching and learning</li> </ul>	
Adequate preparation in content area and grounding in the community	<ul style="list-style-type: none"> <li>• Invests time and effort in community partnerships for peer review, feedback, and OER-engaged pedagogy (OEP)</li> <li>• Facilitates training and professional development in OER-related competencies (e.g., the five Rs of OEP)</li> <li>• Conducts action or design-based research to evaluate OER extensibility to community teaching and learning contexts</li> <li>• Demonstrates OER leadership as an advocate in the discipline and OEP cycles</li> </ul>	

<p>Appropriate methods, rigor, and community engagement</p>	<ul style="list-style-type: none"> <li>• Enhances OER material by incorporating updated and real-world information from community members critical to student learning of course material</li> <li>• Deepens and contextualizes the learning experience in OEP/ OER by involving community experts in design and implementation</li> <li>• Leverages grants for OER projects or an OER research project because of community involvement</li> <li>• Refines a research question or confirms its validity through cogeneration with a community partner</li> <li>• Involves the community to improve OER design, recruitment of other community members in OEP, instrument collection for OER-related research, or presenting and/or publishing because of OER project(s)</li> <li>• Disseminates the findings more broadly through partnerships with community organizations looking to adopt, adapt, or create OER in the discipline</li> <li>• Improves ethical credibility of OER for teaching and learning by directly addressing specific issues/concerns with the community</li> <li>• Encourages the extensibility of other OER for communities beyond the university</li> </ul>	
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<p>Significant results: Impact on the field and the community</p>	<ul style="list-style-type: none"> <li>• The community contributes to as well as benefits from the OER research and/or OER materials</li> <li>• The OER makes progress toward diversity and inclusion for learning</li> <li>• Directly contributes to learning materials that did not previously exist</li> <li>• Secures increased funding to continue, expand, or replicate the initial OER project</li> <li>• Secures increased funding for community partners</li> <li>• Increases capacity of individuals in the community to advocate for OER and to use Creative Commons and/or fair usage licensing for their ongoing work</li> <li>• Enhances opportunities for students and staff to assume positions of leadership with the community</li> <li>• Opens up additional areas for further exploration and collaboration of OEP</li> <li>• Disseminates geographically limited work with clear discussion as to its generalizability to other populations or as a model that can be further investigated in other settings</li> </ul>	
<p>Effective presentation/ dissemination to academic and community audiences</p>	<ul style="list-style-type: none"> <li>• Publishes research results or teaching innovations in peer-reviewed journals, practitioner journals, professional blogs, or newspapers read by community members</li> <li>• Disseminates information through other media used by community members</li> <li>• Utilizes video, remote, or online programs to reach community members</li> <li>• Produces guidelines or policy documents directed toward administrators, content experts, and teachers</li> <li>• Presents at community events</li> <li>• Coauthors any of the above with community partners</li> </ul>	

<p>Reflective critique: Lessons learned to improve the scholarship and community engagement</p>	<ul style="list-style-type: none"> <li>• Conducts debriefing sessions, focus groups, and/or surveys with community members</li> <li>• Seeks evaluation from community members</li> <li>• Changes OER design or OEP engagement model based on feedback and lessons learned</li> <li>• Engages in personal reflection concerning, for example, issues of accessibility and diversity and inclusion</li> </ul>	
<p>Leadership and personal contribution</p>	<ul style="list-style-type: none"> <li>• Receives invitations to present to professional meetings, national or international conferences</li> <li>• Receives invitations to present to community audiences or facilitate professional development</li> <li>• Receives invitations to testify before legislative bodies regarding statewide OER adoption</li> <li>• Receives invitations to appear in the media</li> <li>• Receives invitations to serve on advisory or policymaking committees at national, regional, state, and/or community levels</li> <li>• Receives invitations to serve on editorial boards for OER initiatives</li> <li>• Receives awards or letters of appreciation from community-based organizations for contributions to teaching and learning</li> <li>• Mentors students, junior faculty, staff, and community partners</li> <li>• Is asked to be a peer reviewer of a colleague's OER materials</li> <li>• Is asked to collaborate on OER university policy and initiatives</li> </ul>	



Consistently ethical behavior: Socially responsible conduct of research and teaching	<ul style="list-style-type: none"> <li>• Cultivates the conduct of “good science” using sound research techniques and appropriate engaged pedagogies that result in meaningful and beneficial contributions to the community</li> <li>• Follows the human subject review process and IRB standards for research</li> <li>• Engages communities in a respectful manner</li> <li>• Recognizes and values community systems and incorporates them into the research process and OER materials as appropriate</li> <li>• Appropriately acknowledges community partners in all dissemination of research and teaching materials whether in writing or presenting</li> </ul>	
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## Results

Whereas OER are not listed as examples of scholarship across any categories (BMS or traditional) within university policy or guidelines, I have met with university leaders to advocate for its inclusion. Nonetheless, I was successful in discussing the merits of OER as an example of research according to the BMS at the departmental level, and as such, in 2018, OER was included as an example of a research product that would count toward P&T. Unfortunately, college and university policies have yet to include OER explicitly; although there has been no pushback from leadership when this has been discussed in conversation. There are ideological and pragmatic conversations related to OER initiatives and P&T alignment with the BMS happening across units, such as research and economic development, diversity and inclusion, the library, and eCampus. All parties are supportive of explicitly including OER activities as examples within the BMS while also acknowledging there is currently no way to evaluate them. In the meantime, I am contributing this case study as part of my OER advocacy to make this important work visible and sustainable so that faculty at my university are incentivized to stay committed to OER activities of all types. The following recommendations summarize ways faculty who create OER and are active in OER community engagement can

communicate their work as scholarship and can adopt or adapt evaluative metrics for self-evaluation and, in the best-case scenario, for P&T policy or guideline adoption in the future.

## Recommendations

- Map your OER activities to the DOERS3 matrix early in the P&T process to identify how your work is characterized and take action steps to collect evidence where it is needed.
- Determine if your OER engagement aligns to standards of research at your university. If so, utilize a table like Table 2 to communicate and justify how. Engage in conversations with P&T committee members early in the process and use this table to guide the discussion.
- Request rubrics from key leaders across units, and if your institution does not provide one for OER, consider adopting or adapting one to put forward in your portfolio.
- OER have great potential for community impact. To the extent possible, identify action steps to target high-engaged scholarship with a community that can partner and collaborate in your OER activities and research.

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## Case Study 13.

# Redefining Recognition: OER Contributions in Librarian Promotion and Tenure

Sharon Clapp and Angela K. Walker

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### Case study writers:

- Sharon Clapp, Associate Librarian, Digital Resources, CCSU
- Angela K. Walker, Associate Librarian, Reference & Instruction, ECSU

### Institutions:

- Central Connecticut State University (CCSU): Master's colleges & universities (larger programs) primarily four-year "balanced arts & sciences/professions, some graduate coexistence."<sup>1</sup> Enrollment in fall 2020: 10,652
- Eastern Connecticut State University (ECSU): Master's colleges & universities (small programs) primarily four-year "arts & sciences plus professions, some graduate coexistence."<sup>2</sup> Enrollment in fall 2020: 4,644

**Type of intervention:** OER work cited in successful applications for tenure and promotion by faculty librarians.

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1. Carnegie Classification of Institutions of Higher Education, "Central Connecticut State University." (<https://carnegieclassifications.acenet.edu/institution/central-connecticut-state-university/>)

2. Carnegie Classification of Institutions of Higher Education, "Eastern Connecticut State University." (<https://carnegieclassifications.acenet.edu/institution/eastern-connecticut-state-university/>)

## Background

Central Connecticut State University (CCSU) is a public regional, comprehensive university located in New Britain, Connecticut. Offering four-year undergraduate degrees, graduate master's-level programs, and two professional doctoral programs (Educational Leadership and Doctor of Nurse Anesthesia Practice),<sup>3</sup> CCSU serves 11,800 students, 9,800 of whom are undergraduates. Approximately 47 percent of CCSU students receive financial aid and over 30 percent are students of color.

Eastern Connecticut State University (ECSU) is a four-year public liberal arts university with an enrollment of 4,082 as of fall 2022. The university has some graduate instructional programs, but 3,275 are full-time undergraduate students. Financial aid is awarded to 76 percent of all students and 28 percent are students of color.<sup>4</sup>

Both institutions are part of the Connecticut State College & University (CSCU) system.

Sharon Clapp holds the faculty position of digital resources librarian at CCSU's Elihu Burritt Library. Her responsibilities include administration of the integrated library system's discovery tool, website content management systems, online repositories, and some digital collections. Familiarity with intellectual property issues and open-source software development spurred the author's advocacy for OERs. She received tenure and promotion to associate librarian in 2018. She participates at both university and statewide levels in OER advocacy efforts and is Creative Commons certified.

Angela Walker began her faculty position as reference and instruction librarian at ECSU's J. Eugene Smith Library in 2016. In the interest of greater equity in higher education, she regularly promotes the use of OERs and organizes workshops about open licenses and how to find and use OER in the classroom. In her self-assigned role as "OER librarian," she is well-known across campus as the person to contact. She is Creative Commons certified and participates in the CSCU OER Council to communicate and advance the use of OERs.

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3. "About Central (<https://www.ccsu.edu/about/profile.html>)," *Central Connecticut State University*. Accessed February 10, 2023.

4. "Facts at a Glance." *Eastern Connecticut State University*.

## The Review, Promotion, and Tenure Process

Both teaching faculty and nonteaching professionals of several types (librarians, coaches, counselors) hold faculty status within the CSCU system. The Connecticut State University American Association of University Professors (CSU-AAUP) contract governs the renewal, promotion, and tenure process at each of the Connecticut State Universities (Central, Eastern, Southern, and Western).<sup>5</sup> Each university and each department offer more specific guidelines for evaluation.

For academic faculty, the four evaluation criteria in order of importance are the following: load credit activity (teaching), creative activity (research, presentations, publications, and other discipline-appropriate creative work), productive service, and professional activity. For AAUP librarians, these evaluation criteria are defined and weighted somewhat differently. The most important factor for faculty librarians is load credit activity; however, this is defined as professional effectiveness in providing library services. The next most important criteria evaluated is professional activity, then productive service to the department and university, with creative activity (e.g., conference presentations, research and publication of articles, books, or chapters) weighted least.

The process for promotion and tenure (P&T) involves an evaluation in several steps. The library's faculty evaluation committee makes recommendations to the library director who then offers their own evaluation. The aggregated materials and recommendations are then sent to the campus-wide P&T committee who will provide a final recommendation to the provost. This process is parallel to that of the teaching faculty wherein a departmental evaluation committee will submit recommendations to their dean, who then adds their own evaluation and moves the dossier forward to the university P&T committee for a final recommendation to the provost.

## OER at the CSUs

CCSU faculty members' efforts to adopt and use OERs have taken place in an ad hoc, decentralized fashion. Upon arrival at CCSU, the digital resources librarian began to gather data on faculty members working with OERs, gained grants to coordinate learning community groups for teaching faculty interested in OER, worked with the Student Government Association to create the OER Pioneer of the Year award, and presented about OER to faculty and other librarians.

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5. Here are current and prior CSU-AAUP contracts (<https://www.csuaaup.org/issues/contract/>).

The digital resources librarian played a role in the conversion of a formerly all rights reserved edition of a CCSU faculty-authored book, *Today's Business Communications*, to a CC-licensed work. Once the proprietary publisher's rights contractually reverted to the authors, she helped them to ensure that their revised digital copy met accessibility guidelines and reduced potential intellectual property concerns (e.g., book jacket artwork.) She made sure that it was then cataloged and curated in the library's digital repository. She also helped the author and new coauthors publish a second revision of this work a couple of years later.

With the addition of two new faculty librarians who were also Creative Commons certified, the library formed a new OER leadership team shortly before the pandemic. This team created an OERs research guide (<https://libguides.ccsu.edu/oer>) and began publishing a once-per-semester OER newsletter. They were participants in the creation of a fair use and copyright guide (<https://library.ctstate.edu/friendly.php?s=copyright>) put together for faculty members across the CSCU system. They have presented on how to find, evaluate, adapt, and create OER at multiple faculty development events and members regularly present on OER at regional conferences for faculty, librarians, and administrators. Team members also assist individual faculty in the discovery, evaluation, adaptation, and publication of OERs.

While changes at CCSU, along with the pandemic and recovery efforts, have created headwinds for coordinated local efforts to further the OER mission in recent years, the university did make the expansion of OER work a part of its latest strategic plan. As part of Goal 1—“Enhancing academic excellent and preparing graduates to thrive in a changing economy: Promote a student-centered environment to ensure success,” the university will “[i]mprove student access and performance by **expanding open educational resources**, focusing on information literacy and promoting sound digital practices” (p. 7).<sup>6</sup>

At ECSU, one of the priority areas defined in the university's strategic plan is to identify ways to make Eastern more affordable: “A process will be developed to collect and use data regarding cost-saving measures for students (for example, **tracking the use of open educational resources** in courses, course textbooks on reserve).”<sup>7</sup>

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6. Central Connecticut State University. (2023, July 26). Strategic plan 2030 [PDF] ([https://docs.ccsu.edu/Strategic\\_Plan.pdf](https://docs.ccsu.edu/Strategic_Plan.pdf))

7. Eastern Connecticut State University. (n.d.). Strategic plan 2020-2025 [PDF] ([https://www.easternct.edu/president/\\_documents/strategic-plan-2020.pdf](https://www.easternct.edu/president/_documents/strategic-plan-2020.pdf)).

The coauthor served on a subcommittee of the Academic Affairs Committee at ECSU with the purpose of investigating a course designation for OER, such as NoLo. This attempt failed when teaching faculty expressed concerns that those courses not labeled NoLo would lose enrollment. Tracking OER usage and student savings, which is now required by the state, is a tedious and time-consuming process, but hopefully, this method will be replaced by internal course tagging in the future.

Out of 18 academic departments, at least 10 departments at Eastern use OER. Math and sociology are the most prolific users, using OER in the broadest range of courses, from introductory to more advanced levels. The coauthor has listed these faculty as the *Eastern OER Network* (<https://easternct.libguides.com/openedu/Eastern>) on the LibGuide to promote cross-campus conversations and support.

The newest step toward affordability has been made by the Art and Art History Department, which replaced expensive art history textbooks with OER and library resources. The OER Contribution Matrix is posted there as well to provide guidance on how to include OER in a P&T portfolio.

In 2021, ECSU was selected to participate in an Association of American Colleges and Universities (AAC&U) project to accelerate the development and adoption of OERs as a strategy for improving educational quality and equity and supporting student success. A three-year grant provides support for Eastern to develop teaching guides, sample course syllabi, and sample assignments that enhance integrative learning using OER and open pedagogy. A political science professor is the grant's project manager with the goal to increase faculty buy-in to use OER.

Both ECSU and CCSU are key participants in the CSCU OER Council and the GoOpenCT statewide OER repository project. At the CSCU system level, there is strong support for OER usage at CSCU campuses and leadership by its constituent librarians through the OpenCSCU research guide website (<https://library.ctstate.edu/opencscu>).

## Approach

### **Citing OER Work in Successful Librarian Applications for Promotion & Tenure**

Both authors earned tenure and promotion before the publication of the DOERS3 OER Contributions Matrix. They both used their work with OER as a part of their P&T dossiers,

although their approaches differed slightly based on their roles and the guidelines in their respective libraries and universities.

For the digital resources librarian at CCSU, much of her OER work was cited in the “Load Credit Activity” portion of her portfolio. The creation of a digital collection for OER in the library’s discovery system, organization of a book display on the library’s first floor for OpenStax textbooks, as well as the creation and maintenance of research guides on the topics of OERs, open access, and copyright were examples of librarian load credit activity. She also included consultations with faculty to support their discovery, evaluation, adaptation, and publication of OER.

Productive Service and Professional Activity were other sections where the digital resources librarian included OER work. Service included collaborating with CCSU’s Student Government Association to create their student-selected “Pioneers in OER” award and representing the university on the Connecticut State Colleges and Universities OER Advisory Council. Professional Activity included OER-related professional development opportunities, such as the Creative Commons certification program, workshops, and conferences.

The reference and instruction librarian at Eastern specifically mentioned her OER work in her letter of application for tenure and promotion. Since it is her role to provide access to information, she invests a large part of her work in improving the accessibility of information through the library website and discovery system. She argues that the rising cost of textbooks negatively affects accessibility and that OERs support affordability for all.

In the P&T portfolio, the author included her OER work under the second and third evaluation categories for librarians, Professional Activity and Service. Eastern’s faculty are provided with subheadings for each category as guidelines on what should be included as one’s accomplishments. The librarian’s portfolio subheadings are specific to their work.

For Professional Activity, OER appears as a service on CSCU-wide committees, as well as professional conferences, seminars, or workshops. The Creative Commons Certificate for Librarians, including related creative projects (infographics, Creative Commons library guide, a Copyright Law 101 tutorial, etc.), is also a good match for this category. The librarian continues to promote these resources for asynchronous learning with other OER promotional activities and uses the material for workshops on OER and open licensing.

OER is mapped to the Service category as work on library, senate, and other university and CSCU



system committees. Another service point is contributing to student organizations and activities through communication and networking with student leaders. These are the obvious given headings that fit some of the OER work being done, but there is so much more.

To include OER work that did not fit the previous categories or subheadings, the librarian at Eastern created an additional subheading. This contains more OER work that was all self-initiated by the librarian to promote awareness and the use of OERs on campus. It is followed by a summary of all OER-related activities—promotion via book displays, email, offerings of new OER titles, research guides, serving on committees and communicating grant opportunities and new policy development, as well as sending out surveys to faculty about their OER use.

Based on these experiences, the authors drafted an adaptation of the DOERS3 matrix (<https://docs.google.com/document/d/1nNHMdVO1BdnujbwMCdtJlCSWAAzarJEpuo3hg3RU-fA/edit>) with two primary modifications. The first was to add the fourth criteria, which is used for evaluation per the CSU-AAUP contract—Professional Activity. For many other organizations that do not use this category, the authors believe that these items would usually fall into the Service category.

The more relevant items to this case study, however, would be the ones used for the evaluation of faculty librarians. Currently, the authors are running these suggestions past their respective faculty evaluation committees while also seeking feedback from a sibling institution's librarian who is familiar with OER and the P&T process. The authors hope to further refine the matrix and ultimately gain endorsement to provide the matrix as an addendum to their departmental guidelines for evaluation.

The librarian at Eastern also contacted the teaching faculty member who regularly organizes P&T workshops for tenure-track faculty to advise them on their portfolio. This faculty member is willing to suggest that OER work is a valuable contribution in the P&T context.

As for the library evaluation process, the goal is to add OER as a standing subheading. But this is a process that needs to go through the Personnel Policies Committee at Eastern before it would go to the senate for a vote—something for the future. Therefore, a mapping of OER work to the existing outline of the evaluation categories is our priority. The adapted DOERS3 matrix is the right tool to accomplish this and encourage more faculty to use OER and integrate this work into their portfolios.

## Results

Getting an adaptation of the DOERS3 matrix tested, finalized, and adopted at either of the university's campus-wide P&T committees or their respective library faculty evaluation committees is a work in process. The coauthors are seeking feedback from sibling institutions about their adaptation of the matrix. They plan to collect anonymized samples of successful evidence for OER work from librarians' portfolios. This would allow for a test mapping of the artifacts to the adapted matrix, with further modification of the matrix, as needed, until evidence for faculty librarians' OER work aligns with the matrix. Once the matrix is locally adapted to the agreement of the librarians, both the product and the process of adaptation can serve as models for other committees struggling to evaluate OER work for tenure and promotion.

Here is a link to the draft of the CSU-adapted OER Contributions Matrix (<https://docs.google.com/document/d/1nNHMdVO1BdnujbmCdtJlCSWAAzarJEpuo3hg3RU-fA/edit>).

## Recommendations

- Adapt the DOERS3 matrix to fit your local context (e.g., faculty union-system contracts, departmental guidelines, university, and/or system goals).
- Build a centralized database of high-quality OER work examples with their assigned matrix categories. These examples can be used to test the local adaptation of the matrix, ensuring alignment between categories and examples of OER work. The database can then be used to demonstrate how candidates can communicate OER work to their evaluation committees for renewal, promotion, and tenure.

## Case Study 14.

# Supporting OER in Tenure and Promotion Documentation: Lessons from the University of Hawai'i

Carina Chernisky; Junie Hayashi; Soledad Lencinas; Beth Tillinghast; and Jason Yamashita

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### Case study writers:

- Carina Chernisky, Public Services Librarian
- Junie Hayashi, Public Services Librarian
- Soledad Lencinas, Public Services Librarian
- Beth Tillinghast, Retired Scholarly Communications Librarian
- Jason Yamashita, Open Educational Resources Librarian

**Institution:** University of Hawai'i

**Type of intervention:** In an effort to proactively support faculty at the University of Hawai'i, the University of Hawai'i OER Committee developed a set of resources to help faculty showcase the impact of their OER efforts throughout their tenure and promotion dossiers and to streamline their overall workflow on future open projects.

## Background

The University of Hawai'i (UH) is a public college and university system offering associate, bachelor's, master's, and doctoral degrees through three universities, seven community colleges, three

university centers, four education centers, and various other research facilities across six islands in the State of Hawai‘i.

The emergent interest in OERs among UH System campuses prompted the creation of the UH OER Committee in 2015. The committee was formed with OER promotion and education efforts in mind. Since its inception, the committee has met monthly to share updates from OER campus leads<sup>1</sup> and other OER champions<sup>2</sup> across the system, as well as support faculty working with or interested in OER through workshops, events, and other activities. With a growing number of faculty using or creating OER, the UH OER Committee recently formed a Strategic Advisory Group (SAG) to undertake collective projects that could efficiently support OER efforts across UH campuses.

The author group for this case study is composed of UH OER Committee members who are librarians from Leeward Community College and the University of Hawai‘i—West O‘ahu, as well as a retired librarian from the University of Hawai‘i at Mānoa.

The tenure and promotion process at the UH System may vary depending on the specific institution, though one common factor is that the process does not formally recognize OER even though there are a significant number of faculty involved with OER. Until recently, no official guidelines or guidance have been provided regarding OER in review dossiers.

## Approach

Since the formation of the UH OER Committee, its members realized the need to clarify the relationship between OER and the tenure and promotion process. At committee meetings, members occasionally and informally discussed the absence of information about incorporating OER into review dossiers. The need for guidance became clear after instructional faculty members, who had recently submitted their tenure and promotion applications, shared their struggles in documenting their OER activities through casual discussions with their OER campus leads. Ultimately, the need to create a resource to assist them arose from the lack of comparable materials that could help faculty working on their contract renewal, tenure, and promotion dossiers. The UH OER Committee

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1. OER campus leads are individuals who lead OER campus efforts and represent their campus on the UH OER Committee.

2. OER champions are individuals who are familiar with OER, using or making them, and consider them an ally of the open movement.

determined that a collaborative approach was necessary in order to create a unified action plan applicable to faculty throughout the system.

Therefore, in April 2021, a subcommittee of volunteers from the UH OER Committee was formed. The UH OER Tenure & Promotion Subcommittee (T&P Subcommittee) initiated the development of a resource that would offer more substantial direction and support to faculty working on contract review dossiers. In addition to exploring if other higher education institutions provided similar support, the subcommittee also reviewed each campus's official tenure and promotion guidelines and determined that it should create a guiding document for faculty. The goal of the document was to prompt reflection and provide suggestions that might be useful in detailing the nature and value of OER work.

The resulting document, *Tenure & Promotion Guidelines* ([https://docs.google.com/document/d/11MsLURIo0JzRDPkM2w6wCgWdyXlBGJP8e\\_DyPBHzb5k/edit#heading=h.1f7r62qpf49f](https://docs.google.com/document/d/11MsLURIo0JzRDPkM2w6wCgWdyXlBGJP8e_DyPBHzb5k/edit#heading=h.1f7r62qpf49f)) (*T&P Guidelines*),<sup>3</sup> is divided into separate sections depending on the type of faculty one might be (e.g., instructional vs. specialist). Each section is then divided into subsections for teaching, research, and service activities, which align with general UH tenure and promotion structural suggestions. Subsections offer practical considerations and tips, identifying suggestions and reflection questions to stimulate thinking and inspire next-step actions. Overall, the content in the guide does not intend to be comprehensive, but it does aim to help faculty conceptualize and describe the varied tasks, roles, and duties that are unique to their OER initiatives. Also included in the guide are FAQs for clarification, a table of contents, campus-specific resources, and appendixes with links to additional resources.

The T&P Subcommittee introduced the first draft of the document to the UH OER Committee in August 2021 to solicit feedback. In spring 2022, the subcommittee shared the second draft with OER champions at Leeward CC and UH West O'ahu, prompting another round of review and editing. After completing additional revisions, the subcommittee presented the final document to the UH OER Committee and implemented plans to release it widely.

While working on the *T&P Guidelines*, the T&P Subcommittee identified the need for additional resources, which were then developed through separate projects. Each of those projects resulted in resources that are briefly described below.

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3. Formally titled *Incorporating OER Efforts into Review Dossiers*.

The *OER Survey Templates* (<https://go.hawaii.edu/xCq>) enables faculty to gauge the effectiveness of their various OER efforts and to obtain crucial qualitative and quantitative feedback from students. Three customizable templates—OER Materials, Open Pedagogy, Textbook Cost: \$0 (TXT0)—are available for faculty to make copies of and use. By prompting faculty to collect data regularly, they will be able to more effectively detail their value in review dossiers and advocate for funding to support their OER initiatives. An introductory guide to this set of surveys lets faculty know that they can tailor the survey to their specific needs: consider which questions should be required versus optional, obtain approval from UH’s Institutional Review Board if the data will be published in some capacity, and review the demographic questions to ensure that they are only collecting data that they are interested in analyzing and using.

The *Open Pedagogy MOU* (memorandum of understanding) (<https://go.hawaii.edu/xCu>) outlines the understanding made between student and instructor when embarking on open pedagogical projects. UH OER Committee members had noticed that faculty experimenting with the open movement were interested in open pedagogy but needed clarification on the legal and ethical implications. While many templates to protect students’ intellectual property exist on the World Wide Web, a standard template for UH faculty did not exist. The UH’s Office of General Counsel was consulted to ensure that the contract was legally acceptable. An introductory guide to the MOU clearly outlines how faculty should use the resource and urges them to obtain informed consent by having a clear and open discussion with students about the project, Creative Commons licenses, and their goal of having students engage in open pedagogy. The guide also provides suggestions so as to avoid situations wherein a student complains that they received a poor grade because they opted out of the open assignment and what to do if a former student later contacts the faculty to try to rescind their license.

The *Mentor-Mentee Framework* (<https://go.hawaii.edu/kaH>) nurtures relationships in which mentees work with mentors to effectively demonstrate their OER accomplishments for their contract renewal, tenure, and promotion dossiers. It also builds a network of potential collaborators for OER initiatives. The framework includes two separate sets of opportunities for faculty: for mentors to be listed on an *OER Mentor Directory* or to join a more structured *Mentor-Mentee Program*. The directory, less structured in nature, functions as a digital bulletin board of UH faculty with extensive OER experience in self-identified areas. It enables junior faculty to connect with mentors who can help them in a specific way, and the interactions may be substantial or more casual. The program is more robust in nature and makes the terms of the mentorship more clearly identifiable. Mentors and mentees must meet to complete a contract defining the expectations of both parties. By participating

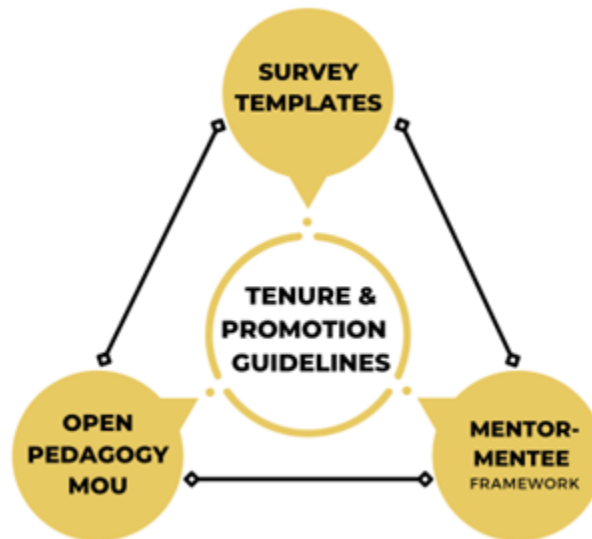
in the program, parties will receive formal professional development acknowledgment letters that they can use in their dossiers for contract review.

Various UH OER Committee members assisted with the development and evaluation of the suite of OER resources, incorporating diverse perspectives. To conclude the work on each resource, supplemental materials were developed to support/maximize their use. For example, resource user guides and FAQs were created to answer commonly asked questions.

## Results

Access to the completed resources was made available through the UH OER website (<https://oer.hawaii.edu/>). While this provided public access to the resources, marketing was necessary to increase awareness and, therefore, promote usage. To publicize the resources and the efforts of the T&P Subcommittee, this author group delivered presentations at local professional development events—the 2022 Hawai'i Library Association Annual Conference and the 2023 Hawai'i Student Success Institute. While these venues were helpful to promote the resources, this author group realized there was a need to create a more sustainable vehicle to achieve far-reaching awareness at the individual campus level. It became evident that showcasing those resources in a single, overarching resource would be beneficial. The idea of an informational toolkit was envisioned, and the T&P Subcommittee was tasked with creating it.

The UH OER Toolkit [PDF] (<https://go.hawaii.edu/Lwk>) introduces the suite of resources, shows the relationships among them, and suggests practical approaches for dynamic and enduring engagement with and between the resources.



This graphic from the toolkit illustrates how the Survey Templates, Open Pedagogy MOU, and Mentor-Mentee Framework support the T&P Guidelines, while working in tandem with one another.

The toolkit is meant for use by individual faculty and others to share and promote these resources at their system campuses.

In the toolkit, each resource includes an action plan checklist with specific and realistic next steps. An additional action plan checklist is available for those promoting the resource, which offers organizational recommendations. The toolkit contains a few additional elements: a glossary of terms to clarify key concepts and a Promotional Slides Template to provide a ready-made presentation.

The creation of the toolkit and the recent presentations have helped bring attention to these materials. The T&P Subcommittee is optimistic that new faculty interest in OER has been generated. The subcommittee has received favorable reviews from faculty who were invited to provide feedback, and it will continue to incorporate feedback in future iterations of the resources.

Institutional policies and programs that promote the use of OER are critical to the long-term sustainability of OER initiatives. The development of the suite of resources ultimately sparked the formation of the UH OER Committee's SAG, forging a synergistic relationship that has strengthened the direction and purpose of the committee's mission, vision, and resource-building objectives. One key outcome of SAG discussions has been a commitment to sustainability to ensure that all created materials adapt to the varying needs of faculty across the system campuses now and in



the future. Through SAG's leadership and advocacy, this author group envisions the development of formal guidelines at a system level.

## Conclusion

The increased usage and development of OER in UH campuses highlighted the need to provide guidance to faculty engaged with open materials. In OER-related training and learning venues, it is convenient and beneficial to present and share customized resources that are vetted, current, and include localized content. The suite of resources described in this case study aims to mobilize OER support in the tenure and promotion process. By creating and disseminating these practical resources, the T&P Subcommittee hopes that faculty have the support they need to assert the value of their OER efforts, ultimately reducing barriers to learning and empowering students on their path to academic success.

## Recommendations

Some recommendations for the successful development of resources, their longevity, and their continued usability are listed below:

- Establish a formal body (like the SAG) that will be committed to helping the project reach its goals and to sustain it year to year. Tasking the formal body to oversee the created materials and make any needed updates will ensure they remain relevant and useful.
- Periodically seek feedback to improve the materials and ensure they are meeting needs. Create a plan to consistently assess the materials to ascertain whether they need to be revised or expanded. The plan should include scheduling annual meetings with campus leads and creating surveys or conducting interviews to gauge faculty usage and experience with the resources.
- Immerse yourself in the collaborative process. Each person's contribution and unique thought process produce results that are stronger and more representative.

## Acknowledgments

This author group would like to acknowledge the work of faculty, staff, and students who contributed to and supported the development of these resources.

Please contact the UH System OER Committee at [uer@hawaii.edu](mailto:uer@hawaii.edu) (<mailto:uer@hawaii.edu>) if you have questions or comments.

## Case Study 15.

# Leveraging the Dual Role of the OER Practitioner/Administrator: 'Making it Count' at an Individual and Institutional Level

Cailean Cooney

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**Case study writer:** Cailean Cooney, Assistant Professor and OER Librarian

**Institution:** CUNY New York City College of Technology

**Type of intervention:** This case shares activities the author has engaged in through their dual role as faculty member and administrator of the college's OER initiative. Topics will include how the author has leveraged their OER work to amplify the documents and activities required in their own tenure and promotion process and how they have approached this subject in faculty development programming. Practical models will be offered for faculty, librarians, and OER coordinators to adapt to their own contexts.

## Background

New York City College of Technology, known as City Tech, is the comprehensive college of technology of the City University of New York (CUNY), the city's public university system. The college is distinct within and beyond CUNY for its unique range of associate and baccalaureate

programs offered in professional studies and technology and design, in addition to the liberal arts and sciences.

The tenure and promotion process for faculty at the college follows a routine structure. Faculty are responsible for contributing a strong record of accomplishments across three areas: teaching, service, and scholarly and/or creative accomplishments (Flores & Olcott, 2020, 5). Faculty document this work by preparing an annual professional activity report and self-evaluation. This becomes the basis of review for reappointment at the department and college level. The faculty member must also write a cumulative self-evaluation to synthesize their accomplishments upon eligibility for tenure review. The “teaching portfolio,” a reflective exercise that structures and documents a faculty member’s teaching contributions, is a required submission for any promotion applicant (New York City College of Technology, 2021, 12).<sup>1</sup> The portfolio consists of eight components: faculty biography, description of teaching responsibilities, statement of teaching philosophy, description of teaching methodologies, course syllabi, student learning and assignments, teaching improvement activities, and future teaching goals.<sup>2</sup>

College faculty have been active in developing OER and engaging in open educational practices (OEP) since 2010: mathematics faculty have authored open textbooks, and the college also developed open digital pedagogy infrastructure, the City Tech OpenLab platform (<https://openlab.citytech.cuny.edu/>), through a Title V Hispanic Serving Institution (HSI) grant.<sup>3</sup> In 2014, the college library department created a professional development program that funded faculty to convert course materials to zero-cost OER in place of publisher textbooks. Three courses were converted to OER in the 2015 pilot initiative, and the program has since expanded to create OER for 147-plus courses with the help of state tax levy funding starting from 2017 to the present.

In my role as OER librarian and coordinator of the college’s OER initiative funding, I design and deliver professional development programs, develop resources, conduct outreach, run workshops, and supervise part-time librarians who also work on the initiative.

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1. City Tech faculty academic personnel policies and procedures are approved by the college’s faculty governing body. More information is available via Guidelines for Faculty Personnel Process [PDF] ([https://www.citytech.cuny.edu/ofsr/docs/guide\\_faculty\\_personnel\\_process.pdf](https://www.citytech.cuny.edu/ofsr/docs/guide_faculty_personnel_process.pdf)), maintained by the college’s Office of Faculty and Staff Relations department.
  2. The City Tech teaching portfolio template (<https://facultycommons.citytech.cuny.edu/parse/parse-teaching-portfolio/>) is available via the college’s Faculty Commons, Center for Teaching, Scholarship, Learning and Service.
  3. The U.S. Department of Education runs a Developing Hispanic-Serving Institutions Program (<https://www2.ed.gov/programs/ideshsi/index.html>) “to expand educational opportunities for, and improve the attainment of, Hispanic students.”.

# Approach

## Engaging in the Teaching Portfolio Process

As a tenure-track library faculty member preparing for promotion, the teaching portfolio was an opportunity to infuse my OER work into a narrative and show evidence demonstrating the prominent teaching focus of this work (Clyde, Cooney, & Tidal, 2021). This was especially important to me because the teaching portfolio process requires rethinking the template—designed for faculty teaching credit-bearing courses—to my own professional context. A secondary goal was creating a compelling package that would double as a cohesive promotional tool to demonstrate the value of OER work in higher education at large.

The first three sections of the teaching portfolio—the biography, description of teaching responsibilities, and teaching philosophy statement—can be likened to bite-sized versions of a foreword and introduction to the rest of the portfolio. Altogether, this content can set the stage for reviewers to engage with the faculty member’s teaching exhibits—the evidence that demonstrates teaching proficiency. In the biography section, I took the opportunity to make clear the duration of my OER work at the college and specifically state that the initiative I manage receives funds through a competitive university-wide application process, which is akin to applying for and managing an external grant. OER program coordination requires high-level project coordination and completing work on tight deadlines according to fiscal year budget cycles. Furthermore, the amount of commitment required in this work can necessarily exclude one from taking on additional grant-funded projects that may carry a higher imprimatur and are traditionally judged as more competitive by tenure and promotion reviewers.

In the teaching responsibilities section, I provided a concise summary of my primary teaching responsibilities, including designing and teaching OER faculty professional development programs, creating accompanying textual and multimodal resources, and conducting program outreach across the college community. I developed my statement of teaching philosophy around principles that drive my approach to professional development with faculty. For example, much of the professional development I lead entails faculty creation and curation of open teaching materials, which is chiefly achieved by independent project-based work. To account for this, I have organized the programming to foster a strong community of practice such that faculty can reflect and learn from one another and ensure that there is individual and collective engagement to privilege access and inclusion in teaching

and (re)designing curriculum. This framing bridged well into the second phase of the teaching portfolio that focuses on documenting teaching impact. These sections include the description of teaching methodologies, course syllabi, student learning and assignments, and teaching effectiveness.

In the description of the teaching methodologies section, I presented teaching activities, assignments, and learning objects I designed to model access and inclusion and focus on these topics and how they relate to OER and teaching. For instance, I have assigned readings, including “Crips Visiting Detroit (<https://creatingcollectiveaccess.wordpress.com/2010/06/02/crips-visiting-detroit/>),” (2010) for faculty to learn from disabled people creating their own access and to challenge their existing notions of ability in the classroom. Faculty shared reflections through discussion prompt responses. In lieu of course syllabi, I included a selection of curriculum designed and taught. For reviewers, I provided an explanation of the OER Fellowship program before sharing its accompanying cohort curriculum. Here I pointed out that professional development program design also includes steps such as drafting an application form for faculty to fill out to be considered for the fellowship, followed by the development of a cohort syllabus to accompany the duration of the program. In place of student learning and assignments, I included anonymous feedback from a postprogram survey with responses from faculty to the following prompt: “The most helpful thing I learned in this program was...” I also mentioned that sharing my feedback with faculty on OER project submissions is an important part of the process, and described various ways I engage faculty throughout their projects. I concluded by sharing an anonymous example of the semistructured feedback I send to each faculty member for the OER they have created that includes suggestions and questions for them to address in advance of teaching. In my context, I demonstrated teaching effectiveness by including anonymous positive feedback from faculty in past programs, exhibits of instructional materials I have developed that were adopted or adapted by other higher education institutions, the number of courses that developed OER through the initiative, and statistics compiled of student textbook cost savings for each academic year since the initiative began.

## Bringing the Tenure and Promotion Topic into Faculty Programming and Initiative Assessment

I have started introducing the topic of featuring OER work in tenure and promotion considerations during conversations with faculty by sharing examples of research conducted on the impacts of OER in higher education and introducing the cohort to the DOERS3 OER Contributions Matrix [PDF] ([https://www.doers3.org/uploads/1/3/2/2/132273765/the\\_oer\\_contributions\\_matrix.pdf](https://www.doers3.org/uploads/1/3/2/2/132273765/the_oer_contributions_matrix.pdf))

(Coolidge, McKinney, & Shenoy), a model for helping faculty represent OER work in these actions. With the 2021–2022 faculty cohort, the group came together for several semistructured two-hour sessions, and myself and coteachers asked the cohort to review an excerpt from “OER at Scale: The Academic and Economic Outcomes of Achieving the Dream’s OER Degree Initiative (<https://achievingthedream.org/oer-at-scale-the-academic-and-economic-outcomes-of-the-oer-degree-initiative/>)” (Griffiths et al., 2020). The purpose was to give the group exposure to some of the research findings from large longitudinal samples using rigorous statistical analysis relating to the impact of OER in higher education and student success metrics. We asked faculty to review the introduction, executive summary, and the results related to student academic outcomes. Beyond gaining exposure, I also wanted faculty to review these results in case it might spark interest in pursuing OER impact research on student learning and perceptions, or whether they might consider requesting student success metrics from the college’s office of institutional research. Since most of the group was composed of full-time faculty, the potential for expanding this work into their scholarship and the scholarship of teaching and learning could be an interesting way to develop their professional profile to support future tenure and promotion actions.

In the same cohort session, we discussed the OER Contributions Matrix. Faculty were also asked to read the OER matrix in advance of the cohort meeting, which led to workshopping the matrix collectively in session. Faculty were first asked to respond to the following prompt with an anonymous comment via Padlet: What categories in the OER Contributions Matrix (teaching, service, scholarship) does your work fall into? Most of the responses indicated a mixture of this work counting toward teaching and service. Some specified it as a department-level service. A couple of comments shared curiosity over the potential for original authorship of OER counting toward scholarship. As we workshopped the matrix through active discussion, other themes emerged, including parallels between OER work and curriculum design, and that this work may also warrant college-level service. During the conversation, I also asked faculty to keep the following in mind: Would this document be helpful in describing your work in the annual professional activity report and tenure and promotion actions? Are there effective ways you’ve already highlighted your OER work in these venues? The aim here was to plant seeds for faculty to consider documenting their OER projects and perhaps expanding them in terms of research and assessment, a step toward building will and awareness to make OER work count.

## Results

The teaching portfolio process helped me hone my skills at conveying the teaching characteristics of librarians and libraries to an audience that may not be familiar with the professional domain and the operational functions of the academic library. In this sense, the teaching portfolio can be used to demonstrate the evolving nature of professional responsibilities and expertise that librarians take on, which often distinguishes us from other academic departments. For example, OER librarian positions and responsibilities are a new phenomenon in librarianship and higher education. Preparing my teaching portfolio was an opportunity to declare that OER is an important activity to teaching and learning at the college broadly and that teaching skills and exchange of teaching practices are central to OER professional development programs. After completing the promotion application process, I am more confident in advising tenure-track faculty about featuring their OER work in the teaching portfolio. I also have more genuine encouragement to offer along with substantive advice. This is an advantage given my positioning outside of colleagues' departments and administrative hierarchies such that I can act foremost as a peer. The opportunity to reflect and assemble evidence of teaching accomplishments and cumulative progress has also strengthened my own teacher identity. Engaging in the process made me more in tune with how OER activities can be featured in the teaching portfolio and can support faculty in building evidence toward tenure and promotion.

While the conversations introduced in the faculty cohort sessions around OER in scholarship and tenure and promotion actions did not translate to tangible outcomes, it was nonetheless an important first step in bringing these topics to the faculty community of practice. Developing some shared knowledge among faculty might have an impact on evolving values and attitudes in individual faculty professional actions and for faculty on appointments and tenure and promotion committees. A theme that came up in the cohort discussion about OER work and getting credit was a sense that faculty not involved in developing OER may be unlikely to recognize the amount of labor and intellectual work involved in authoring resources, researching and identifying strong course materials, and substantively adapting resources to be relevant to students and the curriculum. Perhaps some of the documentation already required for professional documentation, including the teaching portfolio, can be leveraged by faculty members to demonstrate evidence and connect with the groupings offered in the DOERS3 OER Contributions Matrix. This would represent a step toward establishing recognition and credit for OER work at the level of institutional policy and personnel actions.



# Recommendations

For OER practitioners working with instructors and taking a leadership role, particularly in libraries or other administrative support roles distinct from teaching faculty:

- Advocate for professional development resources and support for yourself before or along with advocating for resources to support faculty developing OER. Share examples of resources and support structures that are available to other populations in the academy that would benefit you. Point out these discrepancies in the allocation of resources and support and frame it in terms of professional advancement that aligns with institutional goals and high-impact initiatives that support student success.
- Convey that OER contributions align with institutional missions and goals. Utilize the DOERS OER Contribution Matrix to start conversations. For instance, higher education institutions often seek external funding that inevitably runs out. In contrast, when OER funding is received through state budget allocations, the work has a better chance of continuing on a long-term basis and addressing sustainability and institutionalization unlike short-term external grants.
- Research opportunities to join a peer group to develop a teaching portfolio, and/or adopt elements of the teaching portfolio process as an evaluative and reflective exercise that supports individual and programmatic assessment (Sterling et al., 2022).
- Design multiple opportunities for cohort-based work to start building a community of practice that supports engaged faculty. Connected faculty who are committed will be the strongest advocates and best chance at sustaining efforts and elevating the work of everyone involved in OER efforts.
- Approach faculty professional development as a teaching and learning relationship.
- Learn as much as possible about the college curriculum from various perspectives, particularly faculty, program development, curricular initiatives, and how the curriculum relates to college and institutional governance.
- Cultivate relationships that help you be in tune with the college population and its goals and challenges.

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## Case Study 16.

# Can California's 2025 Compact Dreams Come True? Recognizing the Value of OER in Faculty RTP Criteria

Elaine Correa and Alexander Reid

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**Case study writers:** Dr. Elaine Correa, Professor and Dr. Alexander Reid, Assistant Professor – Department of Human Development and Child, Adolescent, and Family Studies (HD-CAFS)

**Institution:** California State University, Bakersfield (CSUB): 4-year, Public

**Type of intervention:** With an Academic Senate resolution, we are identifying and promoting the value of OERs in the retention, tenure, and promotion (RTP) criteria at CSUB.

## Background

CSUB is a four-year public Hispanic Serving Institution with 11,745 students. Dr. Elaine Correa is the special assistant to the provost, working on reducing educational costs by 2025 (California Compact). Dr. Alexander Reid is the OER HD-CAFS department director. As fellows of the AAC&U OER Institute, we work with the Academic Senate to integrate OER into university-wide RTP criteria.

At CSUB, RTP files are evaluated based on contributions to pedagogy, scholarship, and service. RTP criteria is vetted by the department and approved by the dean. University-wide RTP criteria requires

time-consuming/intensive levels of review. An RTP proposal is submitted to the Executive Academic Senate, then directed to a subcommittee. A decision is presented as a resolution and voted on the Senate floor. Presidential approval is required, and then changes to the academic handbook and RTP policies occur to ensure uniformity in the requirements across departments and disciplines.

We lead OER initiatives at CSUB (including meeting the California Compact), having presented at local, national, and international conferences, and published chapters/scholarly articles. Our award-winning department, HD-CAFS (2019, 2020 winners of Affordable Learning Solutions [AL\$] competition), is the first and only OER program at CSUB, earning the distinction as one of three CSUs to have an entire OER program. As OER grant and award recipients, we continue to seek external funding. We are fellows of AAC&U Institute of OER, serve on CSUB's Advisory Board for AL\$, and are ambassadors for faculty and liaisons for the CSU Chancellor's Office for AL\$ initiatives.

## Approach

Our approach reflects a combination of OER integration from the level of a tenure-track assistant professor actively participating in OER initiatives and a full professor who is serving to promote OER by shifting the campus culture (e.g., student retention, department, administrative changes). The recent state policy changes mandated by Governor Newsom (California) focus on reducing equity gaps and increasing retention to graduation (California Compact requires the reduction in educational costs by 50 percent within the CSU system by 2025).

## The Case of an Assistant Professor with OER and Tenure

Faculty retention, tenure, and promotion (RTP) files are assessed annually based on contributions to Teaching (pedagogy), Scholarship (research), and Service (service to the university, academic field, and community). As a fifth-year assistant professor faculty member at a comprehensive four-year university, I have submitted a total of four cases for RTP review by the RTP-Unit Committee, dean, University-wide Review Committee, provost, and Office of the President. Reviewers score each category on a four-point scale. Pedagogical items submitted in an RTP file include course syllabi, sample assignments, sample slideshows, student-feedback surveys, classroom observations conducted by colleagues, and teaching philosophy, research, and service statements. I also include evidence of my

commitment to teaching my courses utilizing only OER and zero-cost course materials (ZCCM). I have adopted, adapted, and/or developed OER materials and made them available to students via the course learning management system (i.e., Canvas) and my colleagues via a shared cloud (i.e., Box). My department has committed to only utilizing OER/ZCCM; however, this is not an institutional requirement. At a university that prides itself on innovative teaching and creative contributions, the adoption of OER and OEP (open educational pedagogy) should be reflected in the RTP review process and worthy of merit. My pedagogy is informed by my scholarship as I have presented on OER at international, national, and regional conferences.

My department is the first and only department at my university to offer all OER-compliant courses. Our goal is to offer a zero-cost degree (Z-Degree). This work is recognized by the chancellor's office as important; however, the internal university assessment processes (RTP) have yet to acknowledge their value. This contradiction is problematic because the CSU is heavily supporting the Affordable Learning Solutions Initiative (AL\$), Graduation Initiative 2025 (GI 2025), and Diversity, Equity, and Inclusion Initiatives (DEI) that are targeting equity gaps and retention to graduation, and yet CSU institutional policies (RTP) do not come to fruition with university practices (OER/ZCCM).

Service is evaluated at the levels of department, school, university, and field/community. In an OER department, as the OER director, my role encompasses the following:

- Manage the shared cloud, which entails updating the course folders (i.e., 22 courses)
- Ensure that instructional materials are OER and Americans with Disability Act (ADA) compliant
- Develop and disseminate an OER survey to students (measure feedback pertaining to OER usage)

I serve as a university fellow in the American Association of Colleges and Universities (AAC&U) Institute of OER for 2022–2023 in the capacity of

- Drafting the institutional OER survey
- Seeking IRB approval
- Showcasing the survey results at conferences

We recognize that assistant professors are racing against the tenure-track time clock to showcase contributions to teaching, research, and service. OER contributions are overlooked, and the benefits

are not fully valued sufficiently to justify equal status with traditional/conventional requirements for RTP. We argue that the magnitude and scope of such efforts should not be ignored as OER has a profound impact on students, educators, and the community we serve, advancing among others, AL\$, GI 2025, and DEI Initiatives.

## The Case of the Full Professor and OER Campus Culture Change

Governor Newsom's 2022 Multi-Year Compact between the Newsom administration and the CSU system focused on reducing educational costs by 50 percent by 2025. The CSU system (<http://www.calstate.edu>) is the largest system of senior higher education in the USA with 23 campuses servicing 485,550 undergraduate and graduate students and 56,909 faculty and staff. It should be noted that of the 23 CSUs, 21 universities carry the Federal Department of Education designation of being a Hispanic Serving Institution (HSI). To receive an HSI designation, colleges or universities must have a Latino student enrollment of at least 25 percent. The HSI designation makes campuses eligible for federal grants and other programs aimed at strengthening Latino student success.

The CSU system has been working to reduce equity gaps for underrepresented groups, as well as improve retention to graduation rates with the GI 2025 directive. This initiative is aimed to ensure that all students—regardless of racial, ethnic, or financial background—have an equal opportunity to earn a college degree. The adoption of OER or ZCCM course materials reduces expenses for students. Materials are available in an electronic format, which means students no longer need to carry heavy textbooks, as all materials can be uploaded onto their devices (e.g., phones, computers, and/or tablets; Reid & Correa, 2021).

The cost savings from the various CSU initiatives has been impressive, starting with over \$32,000,000 saved by students across the 23 campuses in 2010–2011 when the AL\$ initiative commenced. Currently, \$77,000,000 was saved in 2020–2021, with \$45,000,000 saved by campus activities and \$32,000,000 saved by bookstore activities for students across the CSU system.<sup>1</sup> These savings are significant for CSU students, given that of the 485,550 students enrolled in a CSU in 2020, nearly 50 percent of the students were classified as underrepresented minorities, a third first-generation college

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1. The California State University. (n.d.). Reports and research ([https://als.calstate.edu/reports\\_research](https://als.calstate.edu/reports_research)).

students, and half of the students receiving Pell grants (Federal Financial Aid).<sup>2</sup> The stark reality for many students today is that there are no real choices when it comes to either paying the rent and buying food to sustain themselves and/or their families versus purchasing a textbook (Correa & Bozarth, 2023). The AL\$ initiative has very practical results in supporting student success when textbook costs are removed (Reid et al., 2022).

Faculty buy-in is critical for the AL\$ to grow and expand. There has been skepticism by faculty as to the quality of the OER materials that are available, and thus some pushback has occurred (Green, 2018). Reluctance by faculty to move from textbook reliance to OER or ZCCM may be in part due to the increased workload involved in adopting OER and/or ZCCM for their courses, the limited support and appreciation, the additional time commitment, and no compensation and little, if any, recognition for their efforts (Doan, 2017).

In terms of culture change, the global pandemic highlighted one unanticipated benefit of the OER/ZCCM initiative. Faculty who participated in OER were well-prepared to pivot and change the modalities of courses from face-to-face instruction to online (Reid et al., 2022). With all course materials already organized for students to download, faculty were able to gear their attention to the development of an online course without having to worry about textbooks and access to course materials. This is an important achievement for the university that should include the recognition of faculty OER/ZCCM efforts in the RTP processes.

## Inclusion of OER into Retention, Tenure, and Promotion Process

### Student Resolution

In a presentation, we identified the impact of the OER initiative on our campus (environmentally sustainable, open licensed sources) and highlighted the benefits (reduction of stress and heavy books to carry, immediate availability of course materials) for students in terms of cost savings, reducing equity gaps, and increasing retention rates. Students quickly realized the importance of OER and willingly supported a resolution to work in partnership with the OER advisory board to raise

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2. The California State University. (n.d.). Fact book 2021 [PDF] (<https://www.calstate.edu/csu-system/about-the-csu/facts-about-the-csu/documents/facts2021.pdf>).

awareness and increase adoption. This first step of securing student support was critical in the initial campaign to generate a buzz around ways the faculty could work to support our students (see appendix A).

## Faculty Stipends and OER Support

Within the CSU system through our AL\$ Initiative, faculty were able to apply for funding support under three possible categories (review, use, or creation) identified on the CSUB Library web page. See appendix B for the application materials and requirements for stipends to support the (1) review of OER, low- or no-cost course materials; (2) use of OER or low-cost materials; (3) use and/or creation of OER; and (4) department adoption of OER for courses.

## Senate Resolution

We proposed to the Academic Senate that OER/ZCCM be considered for integration into university-wide criteria for RTP. Our colleagues witnessed an increase in positive student feedback in course evaluations, with more active student engagement when integrating OER. We distributed a survey to teaching faculty across the campus to ascertain who was participating in OER/ZCCM and to raise awareness of OER/ZCCM on our campus. A resolution on reducing educational material costs has been introduced on the Academic Senate floor and is currently being deliberated.

## Results

### The Case of an Assistant Professor with OER and Tenure

As a fifth-year assistant professor, I have submitted four RTP cases for review. I adopted and developed OER materials for all my courses, shared these materials to a cloud for other faculty members, and received positive end-of-the-year course evaluations from students. My RTP reviews have not earned value for my OER contributions. OER curation should merit additional recognition in the RTP process. To consider OER contributions as the minimum of what is expected of tenure-track faculty members speaks to the dissonance between policy and practice. Furthermore, the



reviewers' lack of understanding of OER and underappreciation of the time and effort exuded to create and incorporate OER materials into course curricula is apparent in their low evaluations.

Service contributions are a prime example where pioneering efforts only receive lip service and, in practice, no real benefits (release time, stipends, high assessments in RTP). Faculty members can write a rebuttal to address omissions and inaccuracies.

## The Case of the Full Professor and OER Campus Culture Change

In tandem with the proposal to the Academic Senate, CSUB is also supporting an OER/ZCCM initiative for a “Z-Degree” (no textbook cost pathway). With greater faculty acceptance of OER/ZCCM along with possible changes to RTP criteria where OER/ZCCM is valued in tenure and advancement, the expectation for significant institutional changes is currently underway.

We presented to campus unit constituencies to generate interest and reinforce the value of OER/ZCCM. For example, we asked faculty whether they would support OER/ZCCM if the university-wide RTP criteria included OER/ZCCM for tenure and advancement. The feedback we received was inconclusive due to low response rates. There is pushback at various levels: (1) faculty unaware of OER, (2) faculty lack of familiarity with copyright and licensing agreements, (3) reluctance of faculty to share their original solo-authored materials, (4) faculty fear of losing intellectual property rights with distribution, (5) administration failing to recognize OER as legitimate academic scholarship, and (6) administrative resources to encourage and sustain OER adoptions.

## Recommendations

We offer the following recommendations:

- **Students**

Student government (e.g., clubs and campaigns) can help support (e.g., Textbook Broke Campaign, use of Rocketbook) the value of OER/ZCCM by reducing financial barriers.

- **Faculty**

Institutional practices (e.g., release time, stipends, workshops/trainings) that are integrated into university-wide strategic planning are critical components that measure what counts

and is deemed to have merit.

- **Administrators**

Administrators should allocate release time, additional funding, recognition, or showcasing faculty contributions in research scholarship, service, and teaching.

- **Community**

Community organizations, local businesses, clubs, and media can help showcase the value of OER/ZCCM, with universities (University Advancement) contacting and working with alumni.

## Conclusion

CSU OER initiatives have been in place for well over two decades, yet they have only recently gained momentum because of the pandemic's effects on student recruitment and enrollment. OER/ZCCM has increased in the CSU with the California Compact and the funding expectations based on a 50 percent reduction to educational costs for students within the CSU by 2025; faculty “buy-in” still requires a more aggressive campaign to move toward greater OER/ZCCM adoptions. The impetus for OER should extend beyond political expediency, with the larger vision encapsulating affordability and education for all. We must remain vigilant and focused on continuing to meet goals and move forward with OER initiatives at each level if OER is to be truly embraced within the RTP processes in higher education.

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## Appendix A

SB 101

Resolution in Support of Open Educational Resources (OER)

WHEREAS: The Associated Students, Incorporated of California State University, Bakersfield (CSUB) is the official representative body and the voice of CSUB's more than 10,000 students and is entrusted to represent the best interests of their constituencies; AND

WHEREAS: It is the mission of Associated Students, Inc. (ASI) of California State University, Bakersfield to provide an official voice through which students' opinions and issues may be expressed regarding university and statewide affairs: ASI aids and supports educational events that enhance student's knowledge; AND

WHEREAS: It is the responsibility of all ASI Board members to advocate for all students to have access to an equitable education; AND

WHEREAS: It is evident in the rise of cost in higher education, which has resulted in students having to carry the financial burden, specifically the rise of cost relating to textbook, affecting CSUB students' academic and professional

success; AND

WHEREAS: Open Educational Resources (OER) offer courses at a low or no cost for students, consisting of openly licensed and distributed learning materials free of charge for students; AND

WHEREAS: Affordable Learning Solutions, which was initiated at CSUB in 2013, has saved students more than \$1,500,000; AND

WHEREAS: Open educational resources (OER) help CSUB reach its goal of striving to “Strengthen and Inspire Student Success and Lifelong Learning”; AND

WHEREAS: Open educational resources (OER) have been shown to reduce cost, at the system-wide level and at CSUB, for students, and our institution is encouraged to solve the issue of high-cost textbooks; THEREFORE LET IT BE

**RESOLVED:** Associated Students, Inc. Board of Directors **urges,**

1. California State University’s Office of Academic Affairs to explore high-quality affordable learning alternatives, specifically open educational resources (OER); and
2. CSUB School Deans and Department Chairs to explore and seek grants and other funding opportunities pertaining to open educational resources (OER); and
3. Office of Registrar to make it known upon class registration if courses include open educational resources (OER) resources or are Z majors; and
4. Academic Affairs to provide workshops for faculty to learn about open educational resources (OER) and its benefit to students; and
5. Faculty to provide within their syllabus more cost-effective alternatives, such as open educational resources (OER), in order to lower the cost of course materials; AND BE IT FURTHER

**RESOLVED:** Associated Students, Inc. Board of Directors commit to do the following:

1. Work on creating a survey to include all CSUB students in the discussion about open educational resources (OER) and student struggle relating to course expenses; AND

2. Educate students on open educational resources (OER) so CSUB students are empowered to communicate with their professors about this option; AND IT BE FINALLY

**RESOLVED:** Copies of this resolution will be distributed widely, including, but not limited to, CSUB President Dr. Lynnette Zelezny, CSUB Vice President of Academic Affairs and Provost Dr. Vernon Harper, CSUB Vice President of Student Affairs Dr. Thomas Wallace, and CSUB School Deans, Department Chairs, CSUB Academic Senate, CSUB Bookstore, and CSUB OER Committee.

**Passed unanimously by the Associated Students Inc, Board of Directors on Friday, November 18, 2022**

## Appendix B

Here are the application materials and requirements posted on CSUB Website: Affordable Learning Solutions: AL\$ Day & Faculty Recognition (<https://csub.libguides.com/ALS/day>)

## Review of Open Educational Resources (OER) or Open Access Resources

**Stipends:** \$150

**Agreement:** Review of OER, low-, or no-cost course materials – Memorandum of Understanding [Word] ([https://urldefense.proofpoint.com/v2/url?u=https-3A\\_\\_csub.libguides.com\\_ld.php-3Fcontent-5Fid-3D36925449&d=DwMFAg&c=85d-JtpQPcF9WxygjRwPk3\\_glywpOHWCIm\\_rHsrGxwM&r=C9B931YjAepLDJyey1mwNa\\_iPxiF9RDpkA\\_5gd3VGEk&m=-ZMFlzRyn7Zpf2FR04R9LyjCwtZU0F4tkIMu-Y2LC7o&s=l7v6mTDOvn-dH5CSmFI29ZfWEDNIZAAhQTWpCyh7HMY&e=\)](https://urldefense.proofpoint.com/v2/url?u=https-3A__csub.libguides.com_ld.php-3Fcontent-5Fid-3D36925449&d=DwMFAg&c=85d-JtpQPcF9WxygjRwPk3_glywpOHWCIm_rHsrGxwM&r=C9B931YjAepLDJyey1mwNa_iPxiF9RDpkA_5gd3VGEk&m=-ZMFlzRyn7Zpf2FR04R9LyjCwtZU0F4tkIMu-Y2LC7o&s=l7v6mTDOvn-dH5CSmFI29ZfWEDNIZAAhQTWpCyh7HMY&e=)))

**Qualifications:**

1. Apply online at AL\$ Faculty Stipend Application [Google Form] (<https://goo.gl/forms/tWOTYx1AVSEB06qC2>).
2. Review material that is more affordable, low, or at no cost to students. The savings to your students must be 30 percent or more off the previously used textbook via the campus bookstore pricing. If this is the first time the class is being taught, the savings can be compared to a standard textbook that would be used for this course.
3. Provide a list of all reviewed materials that would be used in place of typical textbooks. Include links and/or PDF versions of all material reviewed along with the cost of the materials or indicate that they are free.
4. Provide the title, author, edition, and cost of the textbooks that your reviewed material would replace.
5. You may use the following guides and rubric to complete your review. Please include a one-page, typed summary of your review, suggestions, and findings. Use Microsoft Word or something similar for the summary and items 2–4. Items 2–4 can be included in your online application or in the summary.
6. MOU for reviewing open educational resources; low- or no-cost materials will be issued.

## Use of Open Educational Resources (OER) or Open Access Resources

**Stipends:** \$150

**Agreement:** Use of OER, low-, or no-cost course materials – Memorandum of Understanding [Word] ([https://urldefense.proofpoint.com/v2/url?u=https-3A\\_\\_csub.libguides.com\\_ld.php-3Fcontent-5Fid-3D30138864&d=DwMFAG&c=85d-JtpQPcF9WxygjRwPk3\\_glywpOHWCIm\\_rHsrGxwM&r=C9B931YjAepLDJyey1mwNa\\_iPxiF9RDpkA\\_5gd3VGEk&m=-ZMFlzRyn7Zpf2FR04R9LjyCwtZU0F4tkIMu-Y2LC7o&s=eqYJFavjvMB1or\\_exKNq0pacdcr-sAiD\\_VcPTvh-nk4&e=](https://urldefense.proofpoint.com/v2/url?u=https-3A__csub.libguides.com_ld.php-3Fcontent-5Fid-3D30138864&d=DwMFAG&c=85d-JtpQPcF9WxygjRwPk3_glywpOHWCIm_rHsrGxwM&r=C9B931YjAepLDJyey1mwNa_iPxiF9RDpkA_5gd3VGEk&m=-ZMFlzRyn7Zpf2FR04R9LjyCwtZU0F4tkIMu-Y2LC7o&s=eqYJFavjvMB1or_exKNq0pacdcr-sAiD_VcPTvh-nk4&e=))

**Qualifications:**

1. Apply online.
2. Select or create more affordable, low-, or no-cost course materials. This includes creating readers and/or course materials/packets for your students at CSUB. The savings to your students must be 30 percent or more from the previously used textbook via the campus bookstore. If this is the

first time the class is being taught, the savings can be compared to a standard textbook that would be used for this course.

3. Utilize the selected textbook for at least one semester.
4. Data to be collected and submitted online:
  - a. Course number and the number of sections you will teach.
  - b. Enrollment total (projected total).
  - c. Student cost of a previous textbook or something that could be used if it has never been taught before.
  - d. Student cost of newly selected or created course materials (printing costs if being printed at the bookstore or print shop).
5. MOU for reviewing open educational resources; low- or no-cost materials will be issued.

## Creation of Open Educational Resources (OER) or Open Access Resources

**Stipends:** \$1,000

**Agreement:** Use and/or Creation of OER – Memorandum of Understanding [Word] ([https://urldefense.proofpoint.com/v2/url?u=https-3A\\_\\_csub.libguides.com\\_ld.php-3Fcontent-5Fid-3D30138942&d=DwMFAG&c=85d-JtpQPcF9WxygjRwPk3\\_glYwpOHWCIm\\_rHsrGxwM&r=C9B931YjAepLDJyey1mwNa\\_iPxiF9RDpkA\\_5gd3VGEk&m=-ZMFlzRyn7Zpf2FR04R9LyjCwtZU0F4tkIMu-Y2LC7o&s=Hrk\\_c2IPwE4eRKRwlF0nOtOGc1tO\\_2OabKATCeunNCos&e=](https://urldefense.proofpoint.com/v2/url?u=https-3A__csub.libguides.com_ld.php-3Fcontent-5Fid-3D30138942&d=DwMFAG&c=85d-JtpQPcF9WxygjRwPk3_glYwpOHWCIm_rHsrGxwM&r=C9B931YjAepLDJyey1mwNa_iPxiF9RDpkA_5gd3VGEk&m=-ZMFlzRyn7Zpf2FR04R9LyjCwtZU0F4tkIMu-Y2LC7o&s=Hrk_c2IPwE4eRKRwlF0nOtOGc1tO_2OabKATCeunNCos&e=)) (must be OER)

### Qualifications:

1. Select an open access textbook and apply online.
2. Utilize the selected textbook for at least one semester.
3. Provide an e-portfolio reporting on the textbook adoption/implementation experience.
4. Create an account in MERLOT.org and then click on Access the Content Builder from the drop-down menu in the top right-hand corner of the web page > Create Web Page. Then select from the template list the “CSU Course Redesign e-Portfolio.” Give the template a name and you are ready to create your e-portfolio.
5. Explain how you shared your experience with colleagues in your department and/or discipline-based organizations (provide a brief description in your e-portfolio).

6. MOU for use and/or creation of open education resources (OER). An e-portfolio must be submitted upon completion.

For departments interested in the \$5,000 prize for most adoptions, a collective effort was also available in the form of a friendly university competition. It should be noted that in the early years of CSUB's participation in the AL\$ initiative, the departmental award was \$10,000. Due to funding decreases, the award in 2023 is \$5,000.

## Departmental Award—\$5,000

As a part of this initiative, the department or school with the largest number of adoptions (within one academic year) of open-source textbooks or other low/no-cost options—that save at least 30 percent off the previously used textbooks—will be awarded \$5,000 from Affordable Learning Solutions funding. The funds should be used to make textbooks more affordable and may include resources, software, and other items and/or professional development opportunities.

- a. Course name, ID number, and the number of sections taught per semester.
- b. Enrollment total for each section.
- c. **Title of previous textbook** used for this course. Remember to include all course materials/supplies (workbooks, notebooks, homework software, or tools).
- d. **CSUB Bookstore cost** of previous textbook or something that could be used if it has never been taught before.
- e. **Title of newly selected textbook/materials.** If no textbook/material is being used, please indicate that. Remember to include all course materials (workbooks, notebooks, homework software, or tools). Provide link or access location if applicable.
- f. **Student cost of newly selected** or created course materials (printing costs if being printed by the bookstore or print shop).
- g. Please enter this data on or before March 2, 2022.
- h. MOU for most adoptions by a department will be issued.



## Case Study 17.

# Open Practices as Scholarly and Creative Work at Oklahoma State University

Kathy Essmiller

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**Case study writer:** Kathy Essmiller, Asst Professor, Research and Learning Services | Coordinator, OpenOKState/OER Librarian

**Institution:** Oklahoma State University, Doctoral Universities: Very High Research Activity

**Type of intervention:** Letters from University Libraries Associate Dean of Research and Learning Services using shared vocabulary highlighting OER as scholarly work.

## Background

Oklahoma State University (OSU) is a doctoral-degree-granting institution in the Midwest. OSU is considered classified as very high research and, as a land-grant university, emphasizes research that has a direct impact on the state and beyond. Around 25,000 students are enrolled in distance, face-to-face, and hybrid programs at OSU, with approximately a quarter of those students working toward graduate degrees. The OSU University Libraries support the research, teaching, and learning activities of students, faculty, staff, and community members associated with the university, as well as providing research and extension support for other statewide efforts. OpenOKState (<https://info.library.okstate.edu/c.php?g=151951&p=6533688>) is a library-supported program that supports and advocates for OER and open practices on the OSU campus.

The retention, tenure, and promotion (RPT) process at OSU has university guidelines that leave

space for contextual specifics. While the overall faculty handbook includes basic requirements for awarding retention, promotion, and tenure, colleges and individual departments have a great deal of autonomy in customizing those requirements to meet the perceived expectations of their field. Faculty requesting consideration for retention or promotion are evaluated by a departmental committee of already tenured faculty at or above their rank. Once the committee and the faculty member's supervisors approve retention, promotion, or tenure, the application proceeds through a college-level committee and then to the provost, who can agree with or override previous committee decisions. When a candidate is being considered for promotion, this process also requires letters from peers in the field at or above the rank of promotion. These letters are expected to come from scholars not directly connected with the faculty member seeking promotion and are a vehicle through which the departmental and college-level committees discern the degree to which the candidate for promotion has had an impact on their field of study.

Faculty rank plays a meaningful role at OSU. Faculty rank categories include noncontinuous, continuous nontenure track, and continuous tenure track. Of those ranks, only continuous tenure-track faculty may participate in faculty governance procedures and decisions, giving them control over, for instance, campus-wide changes in RPT. Continuous nontenure track faculty—such as clinical professors, professional practice professors, and teaching professors—have access to promotion opportunities but are not eligible for tenure and do not serve on tenure committees. Adjuncts, visiting professors, and lecturers are considered noncontinuous faculty and have varying options for retention but none for promotion or tenure. This variation plays a role in how OpenOKState approaches supporting faculty as they describe and document their open practices for their research and teaching dossiers. Additionally, only individuals with faculty rank retain ownership over all their work (including work created specifically for teaching courses). The university claims ownership of instructional works provided by instructors who do not hold faculty rank.

In 2013, the University Libraries' long-term plan was updated to include an emphasis on cost-reduction efforts through the support of OER. After enacting a series of decentralized projects funded by a one-time private donation, the libraries hired a full-time OER librarian to evaluate the projects thus far and design a sustainable program. The details of the first portion of that analysis are included in an article by Essmiller, Thompson, and Alvarado-Albertorio (2020). As the analysis was being undertaken, faculty council completed a survey requested by the provost, which documented faculty understanding of how students procured their textbooks. The survey findings led the faculty council to pass a resolution supporting the creation and use of OER (<https://drive.google.com/file/>

d/1TOhIOJ6glr7LnacRETjv8eXvxCOC-aP7/view?usp=sharing), including in the resolution their conviction that such practices should be considered scholarly work for purposes of RPT. Following the resolution's passing, then Provost Sandefur created a video speaking in favor of considering research, teaching, and learning with OER as scholarly work (<https://www.youtube.com/watch?v=Jh2qmNm9gcQ>). The OSU graduate student governing body passed a resolution similarly supporting the use of OER, and in 2022, the undergraduate governing body also passed a recommendation requesting faculty use of OER ([https://drive.google.com/file/d/1s656dy2gF4hY2h\\_PWFo\\_eH6SioKfaD9w/view?usp=sharing](https://drive.google.com/file/d/1s656dy2gF4hY2h_PWFo_eH6SioKfaD9w/view?usp=sharing)). The purpose of this case study will be to describe how this cross-campus support has been leveraged for faculty inclusion of OER as scholarship in RPT dossiers.

## Approach

In response to the faculty council recommendation described above, the provost issued a call for the library to convene an OER advisory group. The initial purpose of the group was to invite faculty conversation into how the provost's recommendation might be implemented at the department level. It soon became clear that, even in departments whose faculty and administration were eager to include a culture of open, the timeline under which RPT documents were set for review would prevent the timely accomplishment of this goal. A multiyear integration of open practices and OER as a stand-alone category in RPT documents could happen over the course of 3 to 10 years, but the advisory group was eager to capitalize on the current momentum.

As the OER librarian and coordinator of OpenOKState, I began to explore other ways this recognition might be achieved. It is relevant here to mention I am a third-generation educator and a musician. I grew up and worked with people and artists who regularly shared teaching and research resources with colleagues, customized resources borrowed from colleagues, and incorporated student work in ways that impacted the broader community. They had been implementing open practices (Atenas et al., 2022) without knowing they had a name. This “outsider” perspective, as described by Rogers (2003), may have allowed me to see the issue from a slightly different angle. I already believed open practices / OER had been in place long before the term was “coined” (Miao et al., 2019, p. 10). As a social science / learning science researcher, I was also aware of what appeared to be an inaccurate bias toward what was and was not considered research. I was soaked in the realization that what many faculty considered to be innovative had long been centered in others' practices. Rogers (2003) defines an innovation as an idea or practice perceived as new. Rogers (2003) also states that where

innovations appear to be compatible with current practices, the level of diffusion of the innovation increases: “According to diffusion of innovation theory (Rogers, 2003), the diffusion throughout systems or organizations of ideas or practices perceived as new is influenced in part by their perceived compatibility with existing practices, as well as the extent to which use of the innovation by respected leaders can be observed by individuals considering its adoption. The use of OERs in lieu of commercial resources remains an idea or practice perceived as new and continues to experience resistance in some areas of higher education” (Cronin, 2019; Essmiller & Daniels, 2022).

With this understanding of innovations being ideas or practices perceived as new, we shifted our approach away from trying to embed the term OER into RPT documents. If OER were not considered new, it did not need to be explicitly included. It seemed it would be effective to identify where in their current practices faculty were interacting (knowingly or not) with open and to help provide language for them, which describe those practices in scholarly terms embraced by their department. Context was key. Rather than going to departments and having them insert OER into RPT handbooks, the libraries opted to partner with faculty to incorporate existing RPT language into our description of open practices.

## Results

One of the first steps taken by the OpenOKState program was to begin describing OER and open practices as research, teaching, and learning resources and practices. It was hoped that moving research to the front of the description would heighten associated awareness and curiosity, linking OER and open practices with research and creativity rather than having them considered solely as course materials. Next, as the libraries’ scholarly services department worked with faculty regarding research and publication, they were intentional about including OER and open practices within scholarly and creative categories. These small changes were intended to gradually shift how faculty perceived their work in open.

At the same time, members of the OER advisory board provided copies of their departments’ RPT manuals. This allowed the OpenOKState team to identify how department-level specifics differed from the library RPT manuals as well as how departmental guidelines differed from RPT guidelines provided by the university as a whole. A deep dive into these manuals revealed many similarities and some differences. For instance, all the documents spoke of scholarly and creative works as having an impact on the field at state, national, and international levels. Some of them spoke of developing

innovative strategies and/or constructing new knowledge. Almost all of them highlighted the value of collaborative, interdisciplinary work. While most provided examples for how these impacts might be demonstrated, only a few gave specific metrics, such as the required publication of a given number of articles in a given list of journals, and none explicitly ruled out OER.

With that information in hand, the OpenOKState team and OER advisory board were able to highlight how OER and open practices as described in the scholarly literature do, in fact, align with scholarly and creative works as described in department-level RPT manuals. To highlight this alignment, the library administration began issuing letters of thanks and commendation to those faculty involved in open practices on campus using language from their department RPT manuals to describe the work. We have also added a section to our OpenOKState Fellows application that asks faculty to describe how the work they have undertaken aligns with their personal and field-related research agenda; this enables the OpenOKState team to further speak of faculty work in open using a shared vocabulary familiar to others in their department.

For example, one of our faculty grant recipients is in a department whose RPT documents emphasize impact on the field, work that addresses existing gaps, and creative strategies. We were able to use that understanding to identify shared vocabulary. In the letter of acknowledgment, OpenOKState began by acknowledging the faculty member's contribution to the scholarly and creative mission of the university. The letter described the open publication of their work as facilitating its use by others in the discipline. The letter opens and closes with identifying the resources created by the faculty member as scholarly work. We emphasized the role of the faculty member's scholarly expertise in facilitating the local contextualization of the resources and identified how the work addressed a gap in the discipline. An example of the letter is below. Language tailored to match departmental expectations for scholarly work is in bold.

To Whom it May Concern;

The Oklahoma State University (OSU) Libraries wish to **acknowledge Dr. Ashley Burkett's contribution to the scholarly and creative mission of the university.**

As one of fifteen recipients of the OSU Libraries HackYourSyllabus mini-grant, Dr.

Burkett has **designed an undergraduate course for non-science majors** and **distributed the syllabus for the use by others in her discipline.**

The OSU Libraries created the OpenOKState Open Educational Resources program in response to the high cost of commercial textbooks and the impact of that cost on the personal lives and academic progress of university students. Open Educational Resources (OER) are teaching, learning, and research materials intentionally created and licensed to be freely accessed, shared, retained, and in many cases, modified at no additional cost to the end user. With support and funding from the OSU President's Fellows, the OpenOKState program ran a HackYourSyllabus mini-grant initiative which supported faculty switching to non-commercial teaching and learning resources. The mini-grant provided financial and instructional design support for instructors to curate, modify and/or create non-commercial resources for classroom use.

Dr. Burkett's **course redesign incorporated a creative approach** through which she **used the study of dinosaur anatomy, physiology and behavior to introduce students to the scientific process and associated methods of investigation.** In addition to conceptualization and creation of the course design, Dr. Burkett created instructional materials and activities which **provided an exceptional learning experience** for her students. The resources were **created specifically to meet the localized needs** of her Oklahoma State University students and were free for those in her course to access and use. Her course design has **addressed a gap in her discipline, leveraging a unique pedagogical approach to help students discover how to come to their own conclusions based on evidence.** In addition to these benefits to her students and department, Dr. Burkett shares her experience and expertise in creating OER through her service on the OSU OER Working Group.

The OSU Libraries wish to **thank Dr. Burkett for her scholarly contributions to the field.**

There are a couple of additional elements the OpenOKState program has been fortunate to draw on. Faculty work published in our institutional instance of Pressbook (<https://open.library.okstate.edu/>), a platform that facilitates resource creation and modification, is indexed in Pressbooks Directory (<https://pressbooks.directory/>). Pressbooks Directory is intended to be a directory of all resources

made publicly available through Pressbooks, which allows us to support our faculty in saying their work has international reach. The coordinator of OpenOKState is active in international OER organizations, including the Global OER Graduate Network (GO-GN) (<https://go-gn.net/>) and the International Council for Open and Distance Education (ICDE) (<https://www.icde.org/>), and as such, has been able to collaborate with faculty sharing their work at international conferences including OEGlobal (<https://www.oeglobal.org/>), OERX (<https://oerxdomains21.org/>), and OER23 (<https://altc.alt.ac.uk/oer23/>). The OpenOKState program has also been positioned as a leader in statewide OER efforts, allowing us to come alongside faculty incorporating open practices and articulate their scholarly impact on the community and state. Two members of the University Libraries' OpenOKState team hold graduate degrees in instructional design and learning, design and technology. These degrees bring an understanding of learning science and enable the team to articulate what may be considered primarily educational aspects of OER as open practices, which bring people together in innovative ways to create new knowledge. This expertise—combined with the understanding of the publishing ecosystem, discoverability, and expertise in information systems held by the libraries' MLS and MLIS degree holders—provides an effective library team accustomed to approaching wicked problems from a variety of angles to set and achieve measurable, attainable, and meaningful goals.

## Recommendations

- Embrace a personal understanding that OER and open practices are not new.
- Be seen. Go to a faculty council and book clubs and talk about your own research. Help your faculty see you as a researcher in your own right.
- Identify how descriptions of OER and open practices in scholarly literature align with language used in departmental RPT documents. Use that shared language to describe OER and open practices.
- Provide documentation, such as a letter from the library administration on official library letterhead, celebrating faculty work in OER and open practices using the language the faculty member's department uses to describe scholarly and creative works.

## References

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- Cronin, C. (2019). Open education: Design and policy considerations. In H. Beetham & R. Sharpe (eds.), *Rethinking pedagogy for a digital age: Principles and practices of design* (pp. 149–163). London: Routledge.
- Essmiller, K., & Daniels, J. (April 26–28, 2022). “You say tomato, I also say tomato.” Presented at OER22, London, UK.
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- Rogers, Everett M. (2003). *Diffusion of innovations*. 5th ed. New York: Free Press, print.



## Case Study 18.

# Using OER Work in Narratives: Conversations with Tenure Experts

Craig Finlay and Isabel Soto Luna

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**Case study writers:**

- Craig Finlay, Open Educational Resources and STEM Librarian
- Isabel Soto Luna, Business Librarian

**Institution:** University of Nebraska at Omaha (UNO), Doctoral Universities: High Research Activity

**Type of intervention:** We conducted 16 interviews with unit heads at UNO who have experience with mentoring and reviewing tenure-track faculty and, from these interviews, articulated a number of strategies for using OERs work in tenure packets.

## Background

University of Nebraska Omaha (UNO) is a metropolitan university with an enrollment of around 15,500. There are more than 200 programs of study spread across six colleges.

Guidelines for tenure and promotion are described by the colleges themselves. According to the current bylaws of the Board of Regents for the University of Nebraska System, “Each major administrative unit of the University shall prepare written standards which shall be used in making all decisions on promotions, awarding continuous appointments and merit salary adjustments. The

standards may be applicable to the entire major administrative unit, or to appropriate subdivisions (such as colleges, schools, and departments) of a major administrative unit.”<sup>1</sup>

In 2019, the University of Nebraska system launched the Open Nebraska (ONE) Initiative, promoting the adoption of no-cost and low-cost materials and tagging courses as such in the online catalog. As of the end of the spring 2023 semester, this initiative has had a total estimated financial impact of over \$16 million, with UNO accounting for nearly \$5 million of that. Over 100 UNO courses have received internal grants to transition into being ONE-taggable. These include the UNO Criss Library’s Affordable Content Grant (ACG) and, formerly, the Office of Digital Learning Online Course Development Grants. The OER component of the latter grants has been folded into the library program. The heavy majority of the Affordable Content Grants have been for fully OER course conversions.

Examples of recent large-scale, grant-funded projects include all sections of Fundamentals of Public Speaking and Composition II, each offering over 100 sections a year, and all sections of Introduction to Astronomy, the highest enrolled general education STEM course. Craig Finlay oversees the library grant program, in addition to working on the ONE tagging project and working with online learning, and the Office of General Education and Dual Enrollment to strategically target high-enrollment courses for conversions. Isabel Soto Luna works with Craig Finlay on Creative Commons and OER workshop programming through the Office of Digital Learning. Soto Luna also serves on the Affordable Content Grants committee.

A recent innovative achievement was the development of a ONE-tagged degree pathway for the Department of Sociology and Anthropology. This was overseen by Dr. Dan Hawkins, the director of online learning, and funded by the office of Dr. Jaci Lindburg, associate vice chancellor for Innovative and Learning-Centric Initiatives.

## Approach

Given UNO’s broad engagement with OER, we proposed that the university would serve as a good site to conduct a survey of departments regarding if and how OER work affects the tenure process,

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1. University of Nebraska at Omaha. (1990). “University guidelines on reappointment, promotion and tenure recommendations [PDF] ([https://www.unomaha.edu/academic-affairs/\\_files/documents/policies/rpt-guidelines.pdf](https://www.unomaha.edu/academic-affairs/_files/documents/policies/rpt-guidelines.pdf)).” Retrieved May 2, 2023.

with an initial intended focus on language used in guidelines. We interviewed 16 UNO faculty with experience in mentoring and reviewing tenure applicants. It quickly became apparent that none of the guidelines so much as mentioned OER (with the exception of the library). As such, we switched our focus to examples of, and recommendations for, faculty using OER in their RPT process, offering our insight and an insider's guide to using OER work in telling a faculty member's story, documenting impact, and making the case for tenure.

## Results

From these interviews, we describe five major considerations for using OER work in tenure packets:

1. Classifying OER work in a tenure portfolio: teaching, research, or service?
2. OER work as teaching: making the case for excellence in curriculum and teaching developments.
3. Using assessment as research for writing pedagogical research articles, thereby strengthening one's case for excellence in research and creative activity.
4. Getting credit for the amount of work required to adapt/create new OER.
5. Getting a sense of departmental attitudes toward OER.

Due to space constraints, we will be focusing on the first three and making the last two available online as an appendix.

Fortunately, the fact that departmental and unit RPT guidelines did not mention OER directly did not mean the units had not considered the value of OER work. Consistently, interviewees were familiar with OER, supportive of their use, and most had seen OER work used in successful packets. No one indicated a departmental culture that looked down upon OER.

We interviewed 16 faculty and administrators from the College of Arts and Sciences, the College of Education, Health, and Human Sciences, the College of Business Administration, the Dr. C. C. and Mabel L. Criss Library, and the Division of Innovative and Learning-Centric Initiatives, seeking advice for classifying OER work and making one's case in their RPT narrative. As a practical skill, the tenure packet is essential to faculty existence, yet how often can faculty say they learned how to write one before filling out their first? The resulting article provides valuable insight from experienced professionals on this sometimes-daunting process.

# 1. Classifying OER Work in a Tenure Portfolio: Teaching, Research, or Service?

While the specifics of departmental and college tenure and promotion guidelines vary, what is universal is the division of faculty work into three standard categories: research/creative activity, teaching, and service. Most commonly, faculty must make a case for an assessment of excellence in at least the areas of research/creative activity and teaching, with the most weight given to research.<sup>23</sup> Because a given achievement should not generally be listed in both areas, the first decision a faculty member must make is how to categorize their OER work. All 16 interviewees responded that they believed OER work belonged in instruction, and nine had seen successful cases of faculty doing so. While we will discuss OER as instruction in the first two strategies, in section 3, we will describe strategies for using OER to also strengthen the research and creative activity area of your packet.

Dr. Christina Dando is the chair of the Department of Geography and Geology at UNO. Her faculty have the distinction of having received more Affordable Content Grants, eight in all, than any other department and all for full no-cost OER conversions. For Dando, OER work is an ideal chance to make the case for teaching excellence because OER adoptions necessitate what is effectively a course redesign. The chance to reexamine learning outcomes and objectives, week-by-week schedules, and the change in pedagogy of switching to online materials all count as curriculum development, a cornerstone of the teaching category.

“It’s not enough to simply teach the class, and you can’t go up [for tenure and promotion] on student evaluations alone,” Dando said. “You need to demonstrate innovation and development.”

This was a key takeaway, and one that every interviewee noted. Student evaluations and the number of classes taught are not by themselves sufficient to establish excellence in teaching. Tenure committees look for curriculum development, and to make that case, faculty need to demonstrate innovation, assessment, and responsive course design. Dr. Danielle Battisti, chair of the Department of History, seconded the potential of an OER conversion to address multiple categories of

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2. Schimanski, L. A., & Alperin J. P. The evaluation of scholarship in academic promotion and tenure processes: Past, present, and future. *F1000Res*. October 5, 2018, 7:1605.
  3. Youn, T. I., & Price, T. M. (2009). Learning from the experience of others: The evolution of faculty tenure and promotion rules in comprehensive institutions. *Journal of Higher Education*, 80(2), 204–237.

curriculum development, including new course development, course redesigns and updates, and creation of new materials and online conversions.

“Some of us have been teaching the same class over and over again, and maybe it’s been years since someone really tinkered with their syllabus, and it’s time for redevelopment, either in materials or to integrate more online instruction,” Battisti said. “And we’re very aware of the push for OER, and many of us have already been moving in that way organically, as more and more materials become available.”

Both the Department of Geography and Department of History adhere to the College of Arts and Sciences RPT guidelines, which require evidence for the following:

- Distinguished performance in teaching or research/creative activity.
- Proficient (or higher) performance in the other area—that is, teaching or research/creative activity.
- Competent (or higher) performance in service.

For the service category, faculty usually rely on committee work, whether to the institution in the form of doing a two-year stint on the university parking committee or to the profession, in the form of professional association committee work.<sup>4</sup> For OER work, a faculty member might look to serve on a committee that is already doing OER work, or they may introduce an OER initiative at a professional, departmental, or university level. An example of how non-OER-specific committees can undertake such work is a 2021 UNO Faculty Senate resolution, prepared by the Committee on Educational Resources and Services, affirming support for OER and the adoption of a university-wide tagging system for the online course catalog,<sup>5</sup> which allows students to search specifically for low- and no-cost courses when registering. For teaching and creative activity, however, a faculty member may be torn if they devoted a great deal of labor to the creation of new materials, even writing a new textbook. Having done so, they want rightful credit for their work, and research/creative activity seems the logical place to do that.

The problem arises in the fact that much of the OER ecosystem has arisen outside of the realm of

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4. Lee, D. (2007). On the tenure track: Strategies for success. *College & Research Libraries News*, 68(10), 626–661.

5. University of Nebraska at Omaha. (2021). “2020–2021 Faculty Senate Minutes, Wednesday, April 14, 2021 [PDF]. (<https://www.unomaha.edu/faculty-senate/faculty-senate/2020-2021-fs-minutes/2021-04-fs-minutes.pdf>)” Retrieved April 13, 2023.

standard publishing networks. And even those created through conventional publishers often don't meet departmental standards for what constitutes research: a guiding research question, a methodology, and a peer-reviewed publication.

“Our department is pretty black and white in that research has to have a hypothetical question that's being researched or answered,” said Dr. Jodi Kreiling, chair of chemistry at UNO, when asked where new materials creation would likely fit. “So for us, it would still go under teaching because it would be curriculum development.”

## 2. OER Work as Teaching: Making the Case for Excellence in Curriculum and Teaching Development

Just as simply listing the number of courses taught and years taught is insufficient for an excellent assessment in teaching, so is simply listing OER adoption. While OER provides a great opportunity to make the case for development, assessment, and innovation, one cannot simply assume that reviewers will know the amount of work that goes into the adoption of open resources. Each of these must be described in turn. The complexity of assessing teaching often makes this narrative more challenging than the research narrative, as multiple interviewees noted. While research can be more neatly described in terms of peer-reviewed publications, faculty are unlikely to have such a simple descriptive tool for teaching. At UNO, faculty can apply for course development grants through the Office of Digital Learning, which pairs faculty with instructional designers to work on accessibility, engagement, and learning outcomes, among other things. It is likely that most unit heads at UNO would be familiar with this program, but even so, the case for development, assessment, and innovation must be made textually, in the narrative.

Dr. John Erickson, chair of management for the College of Business Administration, summed up the challenge reviewers often face: “On the teaching side, things are always a little more difficult to judge because you have to look at the quality of teaching, the engagement with the students. New course development, assessment. And then there's still a variety of other things that you can use to judge people's teaching,” Erickson said, “It's never as simple as it is with research.”

Whereas a research narrative can simply describe an overall research area and list journal article publications, presentations, and scholarly manuscripts, a teaching case needs to make an *argument*. And while the adoption of OERs will necessarily require a substantial amount of attention to

deliverables and teaching modalities, OER work also offers the potential for further assessment and demonstration of a thoughtful, progressive approach to teaching excellence and student success.

Dr. Chris Moore, chair of the Department of Physics, advises writing a narrative in a way that describes teaching as an ongoing process rather than something to be counted in terms of the number of students and courses taught. Toward this end, Moore advises faculty to think of their teaching narratives in the same way they do their research narratives.

“We’re trained in grad school to write publications, journal articles and grant proposals, and we’re always thinking, ‘what’s next,’ and ‘how is this going to lead to that,’ and that bit of self-reflection on the research side,” Moore said. “You see, [research] narratives that have that built in, but then on the teaching side you don’t necessarily see the same thing.”

To make the teaching narrative a story of progress, faculty should undertake continual assessments along the way. An OER implementation should not be a one-and-done project but rather a process of continual improvement. The most common method, after calculating simple monetary impact, is to track drop-fail-withdrawal rates and student GPA. While several studies—including Clinton and Khan (2019),<sup>6</sup> Colvard, Watson, and Park (2018),<sup>7</sup> and Pelton et al. (2023)<sup>8</sup>—have found that OER adoption improved student performance in these metrics, many other studies have found no significant difference. Grimaldi et al. (2019) postulate that the high number of null results stems from the access-hypothesis of student success, which does not apply to many students whose performance will be included in these metrics.<sup>9</sup> Barring the happy result of a positive student success correlation then, what else can faculty use in terms of assessment? Here, Moore stresses the value of qualitative data: “For example, if you’re going to implement OpenStax Astronomy, you’d want to just ask your students what they thought about that. What do they think about the materials you’re using, how it can be done better.” Moore said, “Has it made the course more accessible to them? Did it factor into their decision-making process for enrolling in the course? These are all things you can ask students on simple Google form, make it anonymous, and you can get some good responses.”

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6. Clinton, V., & Khan, S. (2019). Efficacy of Open Textbook Adoption on Learning Performance and Course Withdrawal Rates: A Meta-Analysis. *AERA Open*, 5(3), 2332858419872212.

7. Colvard, N. B., Watson, C. E., & Park, H. (2018). The Impact of open educational resources on various student success metrics. *International Journal of Teaching and Learning in Higher Education*, 30(2), 262–276.

8. Pelton, J., Carlson, K., Finlay, C., Glenn, E., Hawkins, D., & Lindburg, J. (2023). *Student success in open Nebraska courses* [white paper]. University of Nebraska at Omaha Division of Innovative and Learning Centric Initiatives.

9. Grimaldi, P. J., Basu Mallick, D., Waters, A. E., & Baraniuk, R. G. (2019). Do open educational resources improve student learning? Implications of the access hypothesis (<https://doi.org/10.1371/journal.pone.0212508>). *PLoS ONE*, 14(3): e0212508.

Moore added that the key to this approach is freely admitting what did not work, in addition to what did. If a faculty member is assessing the impact of OER adoption along the way, including both quantitative and qualitative student feedback, then that assessment enables faculty to adjust and better those outcomes. This demonstrates the growth mindset that committees are looking for in a teaching narrative.

A final aspect of the teaching narrative to remember is that the faculty member is using their narrative *to tell a story*. Here, the “narrative” portion is important. While the variety of work a faculty member does during their tenure process is unlikely to all fall under the same umbrella area of focus, the narrative is a faculty member’s chance to make the case for diverse accomplishments at least living in the orbit of one or two gravitational forces. As with research projects taking a researcher to unexpected places, teaching journeys are rarely as clean as “I set out to do X, and X is what I did.” Unexpected opportunities and partnerships can arise, and new unit-specific or university-wide initiatives can give faculty the chance for service and recognition. Even so, a narrative can describe work in such a way as to give the impression of a more unified approach than is imparted by a simple list of accomplishments.

Dr. Dando stressed that this is one of the most important considerations when looking at the tenure narrative *as a craft*. “Writing your narrative is your chance to tell your story, and it’s important that the story be coherent. Not everything someone has done will have been according to a single guiding strategy, but the narrative where they can describe these projects in consistent terms,” Dando said. “So you can say, ‘my work with OER was student centered; my curriculum development was student centered.’”

Fortunately, as OER adaption and adoption can be described as contributing to the areas of development, innovation, and assessment, OER work can also slot into any number of larger university or unit focuses and initiatives. For example, if a university strategic plan specifically mentions equity and access, OER work falls within that area. The same is true for initiatives to support online learning, improve student success, or innovate emergent pedagogical modalities.

### 3. Using OER Work to Strengthen Your Research and Creative Activity Case

The idea of listing OER work within the teaching while research and creative activity are often weighted more heavily may strike some as disappointing. It does not need to be the case, however,



that OER work neglects the research and creative activity case of a tenure packet. If a faculty member is undertaking regular assessment in their OER work to demonstrate continual improvement in teaching, they are also, in doing so, undertaking data collection for research in scholarship of teaching and learning. As an interdisciplinary field, scholarship of teaching and learning journals are open to articles looking at learning and innovation in any subject area.

Dr. Kreiling, UNO chemistry chair, specifically referenced Allen et al. (2014), which evaluated the effectiveness of ChemWiki compared to standard chemistry textbooks. Multiple interviewees noted the possibility of OER adoptions to serve as the basis of pedagogical research, thereby allowing faculty to effectively use some of their labor twice. While it is unlikely that scholarship in teaching and learning publications alone will satisfy unit research requirements, they can certainly strengthen one's case, diversifying their contributions to scholarly literature.

Dr. Moore, UNO physics chair, is also a discipline-based educational researcher. His 2017 book, *Creating Scientists: Teaching and Assessing Science Practice for the NGSS*, looks at deployable tools to undertake continual development of science education according to Next Generation Science Standards. As such, Moore notes that he has a different research focus than most of his faculty and is familiar with the challenge of splitting often overlapping work into the different baskets of research/creative activity and teaching.

"You have to make a decision as a faculty member how you're going to sell that: Is it research, or is it teaching?" Moore said. "That was a challenge I had to go through—I had to use that pedagogy development, the efficacy studies of different things that we were doing as my research. So how do you make the distinction between the two?"

For Moore, undertaking assessment from the beginning contributed to both categories, and by continually tracking student performance, he had numbers to support his tenure case alongside the research credit for his pedagogical scholarship. It's something he says he's integrated into his tenure mentorship of new physics faculty by sending them to teaching assessment workshops.

"When they come back, part of the process is just talking about the things they've learned, what they've implemented, and how to show in a simple way that it's having an impact on students," Moore said.

This kind of assessment enables OER adopters to, alongside the establishment of a research question and following a research design, package their OER work-as-scholarship of teaching and learning

publication. Faculty can and should think of their OER work and the research that comes out of it as different deliverables of the same project. Not doing so deprives them of higher-level outcomes for research and creative activity while also depriving their teaching narratives of hard data needed to demonstrate innovation, development, and assessment.

Julie Pelton, another pedagogical researcher, is chair of the Department of Sociology and Anthropology at UNO. That department recently completed the creation of an affordable content degree pathway, the first in the University of Nebraska system. That project, funded by the UNO Division of Innovative and Learning-Centric Initiatives, used incentive grants for faculty who converted identified courses needed to create the degree pathway. Pelton advises that faculty who are doing OER-based curriculum development keep in mind that there are a variety of outcomes that can come from the same project.

“In our RPT process, creating a new class that didn’t exist before or creating a new minor is probably the highest end for teaching,” Pelton said. “Adopting or using a service learning or applied project comes next, and working on a department-wide grant courses, those count more than [simple OER adoption]. And in the grand scheme of things of things that land, that could be a research article on OER, which would be the pinnacle of how OER could count for your promotion and tenure.”

Beyond peer-reviewed research, Pelton advises faculty to look for conference opportunities and other venues for describing their work. Essential in all cases, though, is collecting assessment data along the way, as this allows for publications while also strengthening a faculty member’s case for curriculum development in their teaching narrative.

Undertaking a dual approach of assessment, continual development, and pedagogical research allows faculty to use their OER work in both their teaching narratives and for research and creative activity. That OER adoption is ideally suited to allow for demonstrated excellence in teaching makes such an argument an essential component of narratives by faculty who have done so. And that this same work can easily result in peer-reviewed publications, provided faculty are undertaking attentive assessment, makes OERs a rare two-for-one tenure packet component. Soon, instead of simply discussing how OER might be successfully used in tenure packets, we should consider OER advocacy, which argues that it is in a faculty member’s self-interest to do so specifically *because* it can be such a powerful tool in the tenure process.

## Recommendations

- List OER work under teaching in tenure packets. When undertaken alongside regular assessment, this indicates the key aspects of excellent teaching performance: innovation, development, and assessment.
- Investigate professional development opportunities in the form of teaching assessment.
- Undertake regular mixed-methods assessment of courses in which OER has been implemented, looking at both performance metrics such as drop-fail-withdrawal (DFW) rates and overall grade distribution and at student feedback. Don't be afraid to admit when something didn't work. This will solidify a teaching case as excellent by demonstrating innovation, development, and assessment.
- Use the data collected from assessment to publish articles on scholarship of teaching and learning. Since the data has been collected anyway, it can easily be used for scholarship as well. This will add peer-reviewed scholarship to the tenure packet, even if it isn't in the faculty member's usual area. Some places to start when considering publication outlets include the following:
  - *Innovative Higher Education*. Springer, founded in 1976.
  - *Journal of Curriculum and Pedagogy*. Taylor & Francis, founded in 2004.
  - *International Journal of Science Education*. Taylor & Francis, founded in 1979.
  - *Journal of College Science Teaching*. National Science Teaching Association, founded in 1971.
  - *Journal of Research in Innovative Teaching & Learning*. Emerald Publishing, founded in 2008.
  - *Journal of the Scholarship of Teaching and Learning*. Indiana University Faculty Academy on Excellence in Teaching, founded in 2001.
  - *Open Learning: The Journal of Open, Distance and e-Learning*. Taylor & Francis, founded in 1986.
  - *Pedagogy: Critical Approaches to Teaching Literature, Language, Composition, and Culture*. Duke University Press, founded in 2001.

## Case Study 19.

# The Role of Creation and Utilization of OERs in Appointment and Promotion of Lecturers at the National Open University of Nigeria

Felix Kayode Olakulehin

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**Case study writer:** Felix Kayode Olakulehin, Research Fellow/Lecturer

**Institution:** National Open University of Nigeria (NOUN): Public Higher Education Institution

**Type of intervention:** This chapter reviews the place of creation and utilization of OERs on appointment and promotion of academic staff at the National Open University of Nigeria. Academic staff at the NOUN are lecturers who have responsibility for course design, program coordination, and assessment.

## Background

The National Open University of Nigeria (NOUN) was established in 2002 to provide educational opportunities through open, distance, and e-learning (ODEL). NOUN's vision is to be regarded as the foremost university providing highly accessible and enhanced quality education anchored by social justice, equity, equality, and national cohesion through a comprehensive reach that transcends all barriers. I am a lecturer in the Department of Educational Foundations, with a concurrent appointment as Research Fellow at the Regional Training and Research Institute for Open and

Distance Learning (RETRIDOL). I develop instructional materials in educational administration and planning and action research projects on different aspects of ODeL, including OER, and I facilitate training for different categories of staff on the principles and practices of ODeL.

According to the university's conditions of service, appointment to an academic position in the university is based on distinguished and continuing contributions to research and scholarship, mainly in the form of publications as well as evidence of the ability to provide academic leadership. The promotion of an academic member of staff from one grade to the other is based on the following criteria: qualifications, promotion experience / waiting period, annual performance evaluation report, and publications.

NOUN has an OER policy that is inspired by the recommendations of UNESCO at the World OER Congress in 2012. The purpose of the policy is to guide the development and review of OER materials (NOUN, 2016). The policy clarifies licensing issues and publication rights for OER developed by NOUN staff; provides guidelines on the creation, use, and review of OER; and identifies human and other resources required for this process. While most NOUN course materials made available on the NOUN courseware platform (<https://nou.edu.ng/e-courseware/>) are publicly accessible, they are subject to copyright laws. However, only a portion of NOUN course materials is licensed as OER or available on the OER courseware. I am one of the core staff responsible for training and capacity building of other staff on OER issues, in addition to developing OER-based course materials. I am also a member of one of the teams responsible for action research into OER applications across the university.

## Approach

As an academic, I have incorporated OER into my course design and development process. I have also used OER for creating ODeL training resources, which I used in faculty and staff development. As someone who had been involved in institutional transformation through the use of OER at NOUN from its inception, I have been involved at every stage of the evolution of OER at the institution. This has totally transformed the ways in which the content is presented and received by learners and training participants. Faculty are now more receptive to reusing OER when they learn that the training materials that they fully engaged with, in their training interaction and participant activities, were developed using OER and that full attribution has been provided in line with the

institution's adopted Creative Commons license, which is the CC-BY-SA (<https://creativecommons.org/licenses/by-sa/4.0/>)—that is Attribution-ShareAlike—recently updated to 4.0.

Historically, this was not the case at NOUN. The development of learning and instructional resources, otherwise referred to as course materials, is an integral part of academic staff functions at NOUN. However, faculty understand from their employment contracts that they retain aspects of the copyright for the materials developed. Thus, there was strong resistance to the creation of OER course materials that could be made freely accessible to learners and other users elsewhere from academics who are opposed to the OER philosophy.

However, the argument of the university management and policymakers is that academics had been financially compensated for developing the course materials, and indeed course materials development is the means by which they carry out their teaching and lecturing. The university management therefore embarked on a series of sensitization training and workshops to ensure that faculty who develop course materials are aware that they retain control of their work via the Creative Commons license. Therefore, it is inconsequential whether the resources are restricted or made available as OER. At the time, the use of course materials developed as a part of promotion criteria, along with publication and grant requirements, had not been established. Further along in the part of the historical evolution of NOUN and in its quest to embrace the philosophy of OER, the university established the NOUN OER unit (<https://www.oer.nou.edu.ng/oer/>) with the following mandate:

- To stimulate the awareness of OERs in NOUN and beyond
- To establish an open licensing framework in NOUN
- To contribute to the global OER repository of resources
- To stimulate research and exchange activities in OER
- To provide capacity building in OER
- To offer high-quality open licensed massive open online courses (MOOCs) to the global community
- To collaborate with national and international organizations in OER-related activities

I became one of the task team members identified to support the OER unit in the pursuit of its mandate. This led to the creation of several OER resources that were uploaded to the NOUN OER courseware. However, at inception, NOUN faculty found themselves in a situation where the university did not recognize the creation of learning materials either under the copyright or under the Creative Commons license (CC-BY-SA) as inputs for appointments and promotion. Consequently,

there was a reluctance by full-time faculty to create distance-learning courseware generally and OER-based course materials specifically. The university had to outsource the writing and development of almost 100 percent of its course materials. This is evidently a drain on the limited financial resources of the university. Consequently, members of the OER task team recommended to the university management that the course materials development activity is indeed an integral part of the academic function, more so when done using the vast store of global resources of high-quality content already available as OER. The committee also pointed out the time and cost savings that are associated with the adaptation and/or adoption of OER. Although, it is important to note that the OER task team is more focused on policy rather than OER creation; however, several members of the task team have a basic responsibility for OER creation in their departments.

One of the key strategies that the university adopted to enhance the skills of its academic staff in the development and expansion of OER is to offer a massive online open course titled “Open Educational Resources for Online Learning.” It is a four-week proficiency certificate course designed to strengthen the skills of academics in the integration of OER in their course materials development process. As one of the instructors leading the training, I am able to confirm that many academics increased confidence in the application of OER and enhanced their knowledge and skills of various aspects of OER operations. The university management eventually acquiesced and approved the use of OER for course materials development. As a result, academics are allowed to submit course materials developed using OER or, as OER is also known as, OER courseware for consideration for promotion. The weight of OER courseware submitted can carry up to 40 percent of scores obtainable for promotion; other considerations include evidence of publication in refereed journals, research grants obtained, academic qualifications, and community service.

However, there was a stipulation that academic staff cannot submit OER courseware for consideration for promotion beyond the rank of senior lecturer. The implication of this is that for promotion from any of the three levels before senior lectureship—that is, assistant lecturer to lecturer II to lecturer I to senior lecturer—an individual can submit OER courseware. However, beyond senior lectureship to associate professorship and full professorial chair, the creation of OER courseware shall not be considered. The university management requires further evidence of original contribution to the field in the area of externally funded research; this is a possible reason for the non-inclusion of a requirement to publish OER in the criteria for promotion to the professorial cadre. An interesting observation is that there is presently no stipulation regarding the consideration of OER courseware development for the appointment of a new academic staff of any category. Thus, if a person is being appointed from another university that does not place a premium on OER



development to the position of senior lecturer, for instance, such a person is not required to submit evidence of contribution to OER, which peers already in the same role have had to provide.

## Results

The decision of the university management to start recognizing OER courseware was well received by many budding scholars across disciplines, who heaved a sigh of relief that at last, recognition is being given to their academic productivity in the form of OER courseware. Thus, early career and midcareer scholars were able to gain the desired acceleration in their careers because of the weight that is now been given to the creation of OER materials. However, senior academics in the form of senior lecturers, associate professors, and even full professors no longer see a reason to exert themselves in creating OER courseware, since there is no weight assigned to the development of such resources in the university's promotion process. This is a predictable human response from a utilitarian point of view. The only aspect of the courseware that has relevance to senior academics, such as readers and professors, is the stipulation that inaugural lectures, public speeches, monographs, and related publications are made as OER. One may infer that while this does not offer inducement in the form of promotion, the recognition gained from the display of such publications in the institution's OER repository contributes to the growth of OER development across the university.

## Recommendations

- OER development and creation should be expressly stipulated as consideration for appointment into the faculty/academic staff category of higher education institutions.
- OER development and creation should be included in the criteria for promotion to all academic staff categories, including associate professors and full professors. This is because it is important for professors as senior academics to continue to show leadership in the promotion of the development and utilization of OER irrespective of their earlier contributions in this area.
- OER development and creation is presently optional across the university; however, regulations can ensure that all academic staff contribute to the expansion of the institution's OER courseware. It is proposed that academic staff are given incentives beyond promotion points for those who contribute to OER development so as to ensure a broad acceptance of the ethos of OER.



- All NOUN course materials are to be made available as OERs and use the license as stipulated in the university's OER policy OER Attribution-ShareAlike (CC BY-SA 4.0).

## References

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Retrieved May 21, 2023. <http://www.oer.nou.edu.ng/oer/#>

## Case Study 20.

# Montana State University Library's Efforts to Incentivize, Recognize, and Reward Faculty Use of OERs

Doralyn Rossmann; Brian W. Rossmann; Leila Sterman; and Christina Trunnell

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### Case study writers:

- Doralyn Rossmann, Professor and Dean of the Library
- Brian W. Rossmann, Associate Professor and Open Educational Resources and Scholarly Communication Librarian
- Leila Sterman, Associate Professor and Scholarly Communication Librarian
- Christina Trunnell, Assistant Dean of the Library

**Institution:** Montana State University, Carnegie R1, Doctoral Universities: Very High Research Activity

**Type of intervention:** This case study provides examples from the Montana State University Library in providing a university award, grants, and promotion and tenure (P&T) role & scope language to incentivize, recognize, and reward faculty use of OERs.

## Background

Montana State University (MSU) is a public, land-grant institution and the flagship university in

Montana. The authors are library faculty members focused on open education and scholarly communication and library administrators who serve as assistant dean and dean.

Tenure-track faculty seeking retention at MSU are required to demonstrate effectiveness in the three areas of teaching, scholarship, and service along with integration of at least two of these areas. To receive tenure and promotion to associate professor, faculty must demonstrate effectiveness in teaching and service and show accomplishment in scholarship along with integration of at least two of these three areas. Promotion to full professor requires demonstration of excellence in scholarship along with effectiveness in teaching and scholarship. Again, integration is expected to be shown across at least two of these three areas.

The four-person case study author team has had various involvement in OER through different jobs held during the time this case study occurred. We are the primary team who manages multiple OER efforts at MSU. Collectively, we created an MSU Excellence in Open Education Award to recognize a faculty member who has made efforts to further open education at the university. Our team develops award criteria, performs outreach to encourage nominations, and serves as the committee to select the award winner. We also manage a library-funded OER grant program, conduct workshops about applying, select recipients, and support awardees in the process of OER adoption, adaptation, and authorship. To recognize OER use among our faculty for teaching and to model such recognition for other departments, we updated the library's faculty role & scope document to incorporate OER efforts into our teaching criteria. We crafted the language that was approved for this document. We provide consultation to other colleges and departments looking to modify their role & scope documents to include OER work. Additionally, two of the authors used their work with OER efforts in making the case for their own promotions as faculty at MSU.

## Approach

In 2020, the Montana State University Library established the MSU Excellence in Open Education Award (<https://www.montana.edu/provost/faculty/awards/info/opoened.html>) to recognize a faculty member who demonstrates compelling and significant impact in areas related to affordable and OERs. To establish this award, a library faculty member had to learn more about the requirements to establish such an award, write a proposal for the award, get approval from the library dean to create and fund the award, and then have the award approved by the provost's office. This award is given annually as a part of a broader awards event, the Montana State University Founder's

Day Faculty Awards. Each award winner from the Faculty Awards event is highlighted on MSU's home page with an accompanying article about their achievement and through a recognition ceremony. Typically, university-level awards such as these are included in the P&T dossiers for candidates as an indication of recognition of their meritorious teaching. This award was established in 2020 by the MSU Library and has been given to a faculty member every year since. The first award winner referenced receipt of the award in his successful application for a sabbatical to update his OER text. The second award winner was an assistant professor in statistics at the time of receiving the award and has since been tenured and promoted to associate professor. She referenced her OER award in her tenure and promotion dossier as an indication of her contributions to student success through a teaching lens. The third award winner is a department chair in MSU's two-year program, Gallatin College, and was the first such awardee for any Founder's Day Faculty Awards for that college. Also, 40 individuals, including these award winners, have been funded by the MSU Library's OER grant program (<https://www.lib.montana.edu/services/publication/oer.html>) to help with the adoption/adaptation/creation of OER. Grant recipients highlight these grant awards in their P&T dossiers as evidence of their teaching efforts to improve student retention and success. The Excellence in Open Education Award is an opportunity for nominees and winners to demonstrate that their efforts to use OER have recognized value beyond the classroom.

In addition to establishing an Excellence in Open Education Award, the MSU Library adopted language regarding the value of OERs into the MSU Library's role & scope document in both **Instruction** and **Scholarship**. The following section was added to the document regarding performance indicators for instruction: **"Instruction:** ...Use of open educational resources (OER) in instruction. OER are defined as 'teaching, learning, and research e-resources that are free of cost and access barriers, and which also carry legal permission for open use. Generally, this permission is granted by use of an open license (for example, Creative Commons licenses) which allows anyone to freely use, adapt and share the resource—anytime, anywhere.'" Under qualitative and quantitative expectations, this language is used in the **Scholarship** section: "The candidate shall...describe efforts, if any, to provide open access to scholarship. Open access materials, including Open Educational Resources (OER), are provided through a licensing model for scholarly communication that makes research information available to readers at no cost." These changes are meant to recognize the use and value of OER, to educate the many readers of the role & scope document, and to set an example for other colleges considering adding such language in instruction or scholarship or both. Given that these modifications will not go into effect until the next P&T review cycle, we have not had anyone put forward their dossier under this new document, but it was reviewed and approved by the

University Retention, Tenure, and Promotion Committee and the Provost's Office, which makes these groups more aware of OER and the importance of their adoption by faculty.

Moving forward, our library plans to continue promoting OER use and recognition of these efforts. A next step includes library support for other campus units looking to add OER use into role & scope language. After a major revision to the MSU faculty handbook in 2018, all departments and colleges had to rewrite their role & scope documents, which took effect in 2019. In 2023, the vice provost, who chairs the University Retention, Tenure, and Promotion Committee and signs off on all role & scope changes, sent a message to department and college review committee chairs encouraging them to update their role & scope documents and to consider adding mention of OER use in those documents. Library faculty members subsequently visited a Faculty Senate meeting to promote the use of OER, the library grant program, and the library's willingness to consult with units to adapt OER language into their role & scope updates.

## Results

The activity of establishing the Excellence in Open Education Award has required additional work on the part of the library. Since we established this award in the relatively early days of open education efforts at MSU, we did not have that many people who would be qualified for nomination. As such, we had to proactively encourage supervisors of those who we knew to be making open education efforts to nominate those individuals. In each of the first three years, only one person was nominated per year. This most recent year, we had a lot more OER grant recipients to draw from and ended up with seven nominees. This uptick is both a result of our outreach efforts to solicit nominations and having more people doing open education work because of our funding and efforts on their own.

Regarding the addition of OER language to the library role & scope document, there was disagreement among library faculty about how specific we should be in defining OER, as this wasn't a form of publishing unique from any other in terms of content. If items are published "openly," they are not necessarily better or worse quality than what is found in a paid resource. We reached a compromise in acknowledging that open education is in keeping with library values and, thus, has a place in our role & scope document. Specifically, we already had language in our role & scope documenting the value of open access in making information available to users at no cost; OER naturally aligns with the value of making information more broadly available, thus providing a good path forward to reach a compromise.

## Recommendations

The authors recommend four steps for librarians to support OER.

- First, recognize that open education efforts have a lot of variety in terms of adoption—it can vary widely by institution, by discipline, and by stage in career. Small steps are successes and can be building blocks for future efforts.
- Second, find places where you can make a difference. For example, is there a regular review cycle for role & scope documents in the institution where the addition of OER language could be advocated by those who approve such documents? Are there opportunities for the library to create public recognition, which provides additional visibility for faculty using OER? Are there funding opportunities or services the library can provide that are not otherwise present at your institution and can help move OER forward in a way faculty can cite in their annual reviews or promotion dossiers? In our case, establishing an award for open education has increased awareness of the open education movement. Likewise, establishing grants for faculty has given them incentive to use OER with the added benefit of listing grant awards in their CVs, dossiers, or annual reviews. We also encourage faculty with whom we work to declare their OER efforts in their curriculum vitae, annual reviews, and P&T documents, including providing them with sample wording.
- Third, look for opportunities. Now that we are seeing declining enrollment in higher education, student retention is a hot topic. Capitalize on open education movements with administrators as a way to retain students. For example, our institution recently considered the adoption of a flat-fee inclusive access model for textbook procurement. The library had a seat on the task force considering this option and successfully convinced the decision-makers to adopt a hybrid model that lowers overall fees for inclusive access as more OER are adopted. The goal in this situation is to keep costs lower for students, and having the adoption of OER as a part of textbook provision can reduce cost barriers and access, thus improving student retention.
- Lastly, model the behavior you hope to encourage. If you are advocating that open education is a good thing, you should be able to show that you are walking the walk and know how “to do” open education. At our institution, the library did this by adopting references to OER in both the instruction and scholarship sections of the library’s role & scope document. We also offer consulting with departments as they update their role & scope documents to add similar language. Finally, in a three-credit-hour undergraduate course offered by the library, Social Media Practices, portions of an OER text are used in conjunction with freely available websites

and library-subscribed journal articles and tutorials.

## Case Study 21.

# Investigating the Incorporation of OER in Tenure and Promotion Criteria Through Content Analysis

Ashley Sergiadis

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**Case study writer:** Ashley Sergiadis, Assistant Professor / Digital Scholarship Librarian

**Institution:** East Tennessee State University, Doctoral University: High Research Activity

**Type of intervention:** OERs supporters can become better advocates for faculty by conducting a content analysis of tenure and promotion criteria.

## Background

East Tennessee State University (ETSU) is a four-year public institution with over 13,000 undergraduate and graduate students. ETSU has a university-wide tenure policy and promotion policy. In addition, each department creates its own criteria that its faculty must follow to achieve tenure and/or promotion. ETSU has 10 colleges and administrative units (e.g., Charles C. Sherrod Library) that include over 50 departments with their own unique criteria. I (Ashley Sergiadis) have experience with ETSU's tenure and promotion criteria. First, I obtained tenure and was promoted to associate professor during the 2022–2023 academic year. Second, I became ETSU's Watermark Faculty Success Implementation Coordinator in which I manage the Faculty Activity Reporting system that faculty use to submit their tenure and promotion dossiers.



East Tennessee State University primarily promotes the use of OERs through its Open and Affordable Course Materials Initiatives. These initiatives include membership to the Open Education Network, workshops on OER, an awards program that offers stipends to instructors adopting/adapting/creating OER, and library e-textbook reserves. I colead the initiatives in my role as digital scholarship librarian alongside several colleagues from Charles C. Sherrod Library and the Center for Teaching Excellence.

## Approach

As a coleader of ETSU's Open and Affordable Course Materials Initiatives, I have heard faculty mention that creating OERs did not count toward their tenure and promotion. These experiences aligned with my own, as Charles C. Sherrod Library's tenure and promotion criteria do not mention OERs. When tenure and promotion criteria and policies do not explicitly include certain activities, it adds a level of complication for faculty by requiring them to receive special permissions for that activity to count. This can discourage a faculty member to explore activities not listed in their tenure and promotion criteria. In my case, I had to ensure that my review and editorial activities for MERLOT (Multimedia Educational Resources for Learning and Online Teaching) would count toward tenure and promotion by discussing and approving the activities with my supervisor. While I was able to make the argument that these activities aligned with my librarianship, it was an extra step I had to take before volunteering for these activities.

During the summer of 2020, I was a member of a work group in the Open Education Network that was exploring the issue of including OER in the category of research, scholarly, and creative activities. One of our activities was to investigate the policies at our own institutions regarding this matter. For my institution, I created and conducted a content analysis of the university-wide and department criteria for tenure and promotion in order to understand the prevalence of OER within those documents. The following instructions outline how the content analysis was conducted with some edits so others can replicate it at their own institution.

First, I created a spreadsheet with the following headings:

- Department
- College
- Level of criteria (i.e., department, college, other unit, etc.)

- URL to tenure criteria
- URL to promotion criteria
- Criteria mentions course/educational materials in research, scholarly, and creative activity
- What do the criteria state about course/educational materials in research, scholarly, and creative activity?
- Criteria mentions open or affordable educational resources in teaching or research, scholarly, and creative activity
- What do the documents state about open or affordable educational resources in teaching or research, scholarly, and creative activity?
- Additional notes

Second, I assigned a graduate assistant to enter the following information into the spreadsheet. This assignment did not take the graduate assistant very long to accomplishment (less than a work week or 20 hours).

1. Find the tenure and promotion policies or criteria for your institution and individual units (schools, colleges, departments, etc.). Add the available information in the Department, College, URL to tenure criteria, and URL to promotion criteria columns. In some cases (especially at ETSU), URL to tenure criteria and URL to promotion criteria led to the same or a very similar document.
2. Search each document for the mention of creating or publishing course or educational materials in the research, scholarly, and creative activity section. This may involve searching the document for keywords such as “teaching,” “education,” “course,” or “textbooks.” This may also involve manually skimming through the section to identify relevant information. Write N (No) or Y (Yes) in the Criteria mentions course/educational materials in research, scholarly, and creative activity column based on if you were (un)able to find course or educational materials mentioned in the research, scholarly, and creative activity section. Copy and paste the relevant passages that mention course/educational materials in the What do the documents state about course/educational materials in research, scholarly, and creative activity? column.
3. Search each document for the mention of open or affordable resources within the teaching and research, scholarly, and creative activity sections. This may involve keyword searching “open” or “affordable” or “OER.” This may also involve manually skimming through the sections to identify relevant information. Write N (No) or Y (Yes) in the Criteria open or affordable educational resources in teaching or research, scholarly, and creative activity column based on if

you were (un)able to find open or affordable resources mentioned in these sections. Copy and paste the relevant passages that mention open or affordable educational materials in the What do the documents state about open or affordable educational resources in teaching or research, scholarly, and creative activity? column. It may be appropriate to search other key terms based on the language used at your institution for OERs. For example, ETSU uses the term “Open and Affordable Course Materials,” so I based my search terms based on this language.

4. Consider customizing the fields based on the needs of your institution. Use the Additional notes section to add relevant information that does not fit within your initial categories. You may be able to use the Additional notes section to determine additional fields and relevant information to collect.

## Results

### Course/Educational Materials as Research, Scholarly, and Creative Activity

The university-wide tenure and promotion policies as well as almost half of the departments had criteria indicating that educational materials can be counted toward research, scholarly, and creative activity. The criteria primarily focused on textbooks. Three departments only mentioned reviewing a textbook as a research activity. The rest of the departments that had educational materials count toward research, scholarly, and creative activities focused on creating textbooks. Of the departments that included the creation of textbooks, many departments discussed caveats that faculty had to satisfy in order to count them. Four departments connected “peer review” or “clear evidence of quality of work,” and five departments connected “nationally published” to textbooks. Specifically, the university-wide tenure policy states, “Appropriate textbooks or educational articles in one’s own discipline and innovative contributions to teaching, if published or presented in a peer-reviewed forum, constitute scholarship of teaching.” In addition to textbooks, a few of the departments included other types of educational resources, such as test banks, courseware, and software. The Department of Health Sciences had the most robust examples of educational resources: research-related textbooks, software, or other technology to improve teaching (which gets wider recognition/use), course- or discipline-specific web page, and experimentation of new methods of instruction.

## OER as Research, Scholarly, and Creative Activity

Although the criteria might have acknowledged educational resources, the Department of Mathematics was the only department that mentioned open materials anywhere within the tenure and promotion documents. Specifically, the department listed the development of open-source materials (e.g., software, books, manuals, tutorials, etc.) as an appropriate research, scholarly, and creative activity. Aside from this one mention of open, none of the university-wide or department tenure and promotion criteria explicitly mentioned OERs.

Although not necessarily a mention of “open,” mathematics also mentioned self-published works (as did literature and language). Mathematics states, “Self-published books are given credit pending on review letters of experts on the field....However, books under contract with a publishing company and articles in refereed journals, reviewed by recognized scholars, are looked upon more favorably than those that are not subjected to such rigorous examination.” Faculty publishing OER without a traditional publisher could use this information as a precedent on what documentation may be needed.

## Discussion

Based on this analysis, most faculty at the present time would have to advocate for OERs to count toward tenure and promotion, as the term is not explicitly mentioned in their department’s policies and criteria. Furthermore, educational resources mentioned within the research, scholarly, and creative activities are primarily textbooks. OER is much broader in scope than simply textbooks, meaning that faculty would need to confirm with their department chair that OER other than textbooks would count. Lastly, the policies and criteria sometimes discuss the need for rigor with standards that fit within the traditional publishing forum. For example, one could assume that sharing an OER in the Open Textbook Library or MERLOT that publishes reviews of OER would constitute a peer-reviewed and nationally published product. A faculty member who does not want to (potentially erroneously) assume would need to prove that their OER can be credited according to the definitions included in the criteria. This ask is an unnecessary effort of faculty when the criteria could simply address OER instead.

The return on investment of this assignment has been good. The content analysis was an easy assignment to give to a graduate assistant (if the tenure and promotion criteria are readily available

online). For a relatively short work assignment, I can now confidently present information and evidence when the topic of OER and tenure and promotion arise. I have been able to mention these results in meetings and presentations with committees that are part of the governance structure (e.g., Faculty Senate, Academic Council). I hope to use this information during my discussions on needed changes within the newly adopted Faculty Activity Reporting system (Watermark Faculty Success). Unfortunately, my analysis has not influenced tenure and promotion policy or criteria changes. ETSU is currently in the process of revising its tenure and promotion policies, and departments might modify their tenure and promotion policies and criteria to adhere to the university-wide changes. These potential changes provide me with even more of an opportunity to discuss the importance of OER in tenure and promotion as the new policies and criteria make their way through ETSU's governance structure.

## Recommendations

- Become familiar with the scope of an institution's tenure and promotion criteria and policies. This knowledge can be beneficial when advocating for the recognition of faculty adopting, adapting, and creating OER.
- Use the words "open educational resources" (and an accompanying definition) within tenure and promotion criteria and policies in order to encourage faculty to adopt, adapt, and create OER. If OER is not mentioned in the criteria, the faculty member has an additional responsibility to ensure that their work with OER will be counted toward tenure and promotion. This is an extra barrier that may hinder the faculty member from pursuing OER.
- If including "open educational resources" as an option for research, scholarly, and creative activities, acknowledge how OER may be placed within the spectrum of those activities and be deemed as reputable. Clear guidance on how to demonstrate that OER is reputable will help faculty during the development of their OER and related activities.

## Case Study 22.

# Illuminating Pathways: A Comparative Exploration into Faculty Perceptions and Practices of Open Education in the Tenure and Review Process at Two Community Colleges

Lisa C. Young and Andrea Corbett Scott

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### **Case study writers:**

- Lisa C. Young, PhD Faculty Administrator, Open Education & Innovation
- Andrea Corbett Scott, OER Coordinator, Office of Learning Advancement

**Institution:** Maricopa County Community College District (Associate's Colleges: High Transfer-Nontraditional) and Salt Lake Community College (Associate's Colleges: High Transfer-Mixed Traditional/Nontraditional)

**Type of intervention:** An evaluation of how open education is applied in the tenure and review processes at two community college systems.

## Background

Open Salt Lake Community College (SLCC) and Open Maricopa (OM) are two large community college OER systems that have nearly 10 years of advocacy and strategy around open education. The Maricopa County Community College District (MCCCD) is a 10-college system situated in the

Phoenix metropolitan area, currently serving approximately 80,000 students. The OM (formerly Maricopa Millions) program was founded in 2013. SLCC is Utah's largest college serving more than 60,000 students online and across 10 campus locations in the Salt Lake City Valley. Open SLCC is a large OER program with 11,730 OER sections offered since 2013. This chapter will provide an overview of the tenure processes at both institutions, their similarities and differences, the culture surrounding OER, and how it applies to the tenure process. Highlights include faculty perspective and experiences with leveraging OER for the tenure process (what worked and hasn't).

## Approach

Open SLCC and OM have similar processes for tenure and promotion. At SLCC, tenure-track faculty are the rank of assistant professors and serve a six-year pretenure probation cycle. During the probation period, tenure-track faculty are mentored by an administrator and the faculty evaluation sitting committee members through the Tenure-Evaluation Process (TEP), which is a component of the Formal Faculty Evaluation Process (FFEP).

According to the SLCC Full Time Faculty Handbook for Compensation and Workload Appendix 4/5 [PDF] (<https://faculty.slcc.edu/provost/handbook/docs/appendix-4-nov-2023.pdf>), the Formal Faculty Evaluation Process “provides feedback from department peers, department administrators, and students to improve faculty performance and enhance student learning” (p. 35). The FFEP consists of three assessment areas: Teaching, Professional Activity and Development, and Service. The SLCC Full Time Faculty Handbook for Compensation and Workload Appendix 4/5 notes how distribution areas are weighted: “SLCC faculty prioritize teaching and student learning over the other two areas of responsibility (consistent with SLCC Mission and USHE R485)” (p. 47).

Residential full-time faculty at the MCCCCD are in probationary status for a period of five years. During this time, they are engaged in the Individual Development Plan (IDP) and Peer Assistance and Review (PAR) process. Per the Faculty Agreement (2022) [PDF] (<https://mccfa.org/wp-content/uploads/2022/08/Final-Faculty-Agreement-2022-2023.pdf>), “the IDP process is intended to provide significant professional growth and development for the Probationary Faculty member in an environment of support and encouragement from Faculty Developers, Department/Division Chairs, Faculty Mentors, Instructional Administrators, and others” (p. 84). The IDP is an e-portfolio of sorts in which the probationary faculty document activities from the academic year in relation to three key areas:

- Instruction or primary work activity
- Service to department/division, college, and district
- Professional development

Here is an overview of the process for Open SLCC and Open Maricopa:

- Pre-tenure probation period (6 years for Open SLCC and 5 years for Open Maricopa)
- Mentorship
- Committee evaluation team
- Assessment areas
  - Teaching
  - Professional activity and development
  - Service
- Evaluations
  - VPAA/dean
  - Associate dean/chair
  - Sitting committee (selected by assistant faculty)
  - Standing committee
  - Student evaluations
  - Self-evaluation
- Steps
  - Goal setting
  - Committee selection
  - Teaching observations
  - Professional portfolio
  - Performance evaluation meeting
  - Notification of renew, renew with concerns, nonrenewal

## Assessment Areas

Faculty engaged in the tenure and promotion processes—FFEP and PAR—are able to provide evidence of the three assessment areas. Some ways OER can be leveraged in these assessment areas are as follows:



- **Teaching**
  - The use of OER in the class
  - Use, remix, or development of OER content
  - Open pedagogy
- **Professional activity and development**
  - Participate in scholarship of teaching and learning with OER emphasis
  - Attend conference(s)
  - Complete training
  - Conduct OER Research
- **Service**
  - Serve as an OER department coordinator
  - Join an OER committee or board at the institution or within the OER community
  - Perform peer review

OER adoption was the driver of growth in the early years of program development. As the programs evolved, additional areas of expansion in open scholarship emerged, including faculty interest in OER publication and open educational practices. At SLCC, the Pressbooks publishing platform, Open SLCC, was introduced in the spring of 2020, increasing faculty interest in authoring and remixing OER content. Similar to SLCC, MCCCCD introduced Maricopa Open Digital (MOD) Press, and efforts have shifted focus “to revise, remix, enhance and expand upon the open content in the Maricopa Millions catalog.”<sup>1</sup>

Open educational practices, including open pedagogy, have grown organically at SLCC, with a few faculty members participating in open pedagogy projects. MCCCCD has taken an intentional path for growth and currently participates in the UN SDG Open Pedagogy Fellowship (<https://mcli.maricopa.edu/open-maricopa/unsdg-open-pedagogy-fellowship>), which invites “faculty to work with their colleagues and students to impact change via open pedagogy and community engagement.”<sup>2</sup>

Teaching is still the primary category faculty document OER work within the tenure, promotion,

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1. Maricopa Open Digital (MOD) Press Development Grants—Funding for 2020–2021 ([https://maricopa.instructure.com/courses/811971/pages/maricopa-open-digital-mod-press-development-grants-funding-for-2020%E2%80%932021?module\\_item\\_id=19304331](https://maricopa.instructure.com/courses/811971/pages/maricopa-open-digital-mod-press-development-grants-funding-for-2020%E2%80%932021?module_item_id=19304331)): OER @ Maricopa (Maricopa Open). Accessed June 1, 2023.

2. “UNSDG Open Pedagogy Faculty Fellowship (<https://mcli.maricopa.edu/open-maricopa/unsdg-open-pedagogy-fellowship>).” *Maricopa Community Colleges*. Accessed June 5, 2023.

and evaluation process; however, both institutions have observed a significant shift in faculty highlighting open scholarship within the Service and Professional Development categories.

## Results

While OER can be a catalyst for faculty recognition, how OER is officially recognized at the institution level is indistinct. To gain further clarity on faculty perceptions and experiences of OER within the tenure and process, SLCC and MCCCCD partnered to launch a survey. The target population included full-time faculty at both institutions. In the SLCC survey, 22 percent of full-time faculty members participated, with 55 percent associate professors, 25 percent assistant professors and 16 percent professors (tenure rank), 3 percent instructors, and 1 percent associate professor/coordinator participating in the survey, including representation from 29 academic departments. For the MCCCCD survey, of the full-time, residential faculty that participated, 53 percent were probationary faculty (currently doing PAR) and 47 percent were appointive (completed PAR) with nine fields of interest represented.

In the Faculty Perceptions of OER within Tenure and Promotion Process surveys at MCCCCD and SLCC, faculty were asked to categorize OER activities based on application experiences and perceptions. In the SLCC survey, faculty were provided three choices, including Teaching, Service, and Professional Development. The MCCCCD included Service and Professional Development. For this case study, only the Service and Professional Development categories were analyzed in Charts 1 and 2.

Chart 1 compares MCCCCD (n = 54) and SLCC (n = 59) faculty survey responses. Faculty were asked the following question: Which categories within tenure and promotion do you feel the OER activity on the left best associates with? Select all that apply.

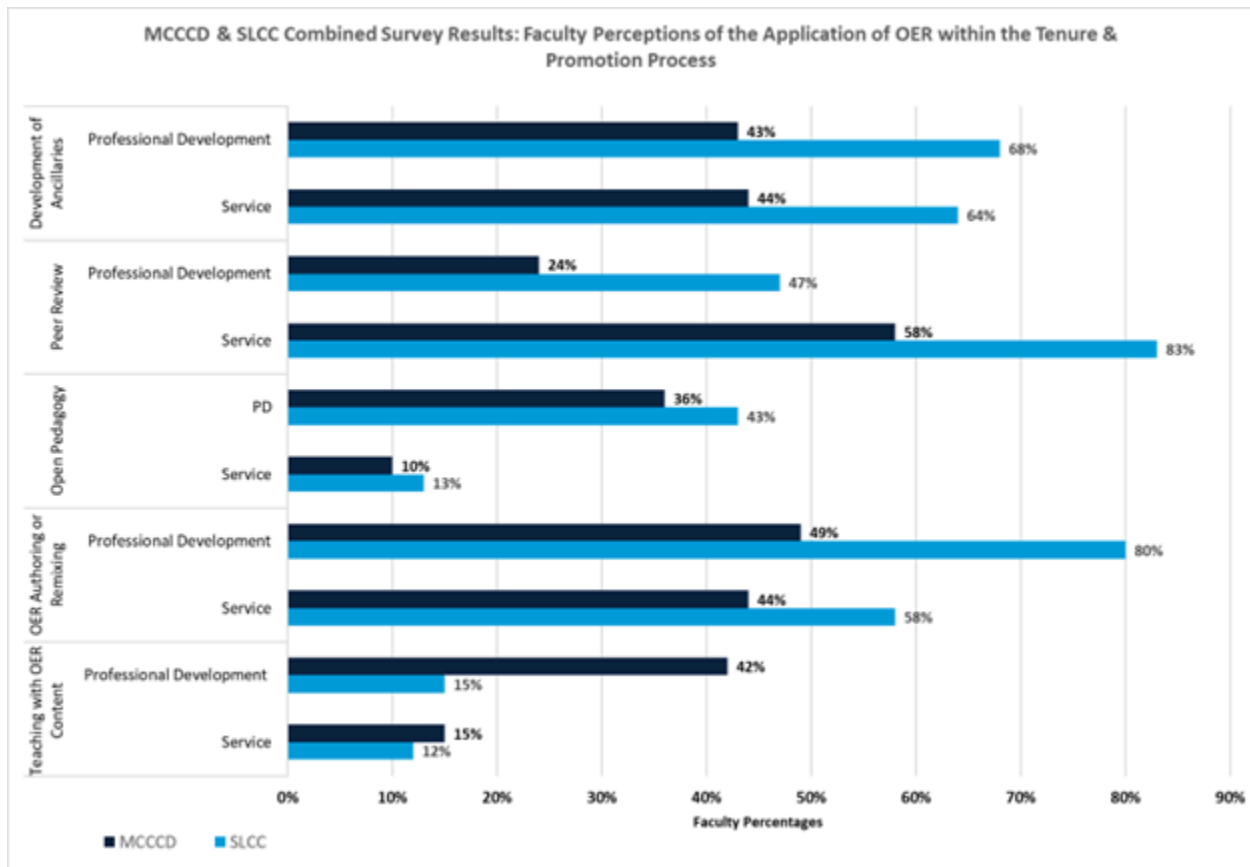


Chart 1: MCCC and SLCC Combined Survey Results: Faculty Perceptions of the Application of OER within the Tenure and Promotion Process. [Chart 1 Image Description]

Chart 2 displays a comparison of the MCCC and SLCC faculty survey results regarding the application of OER within the tenure and promotion process. Faculty were asked the following: “Have you documented OER related work in any of the following categories for your Tenure and Promotion Evaluation? Select all that apply.”

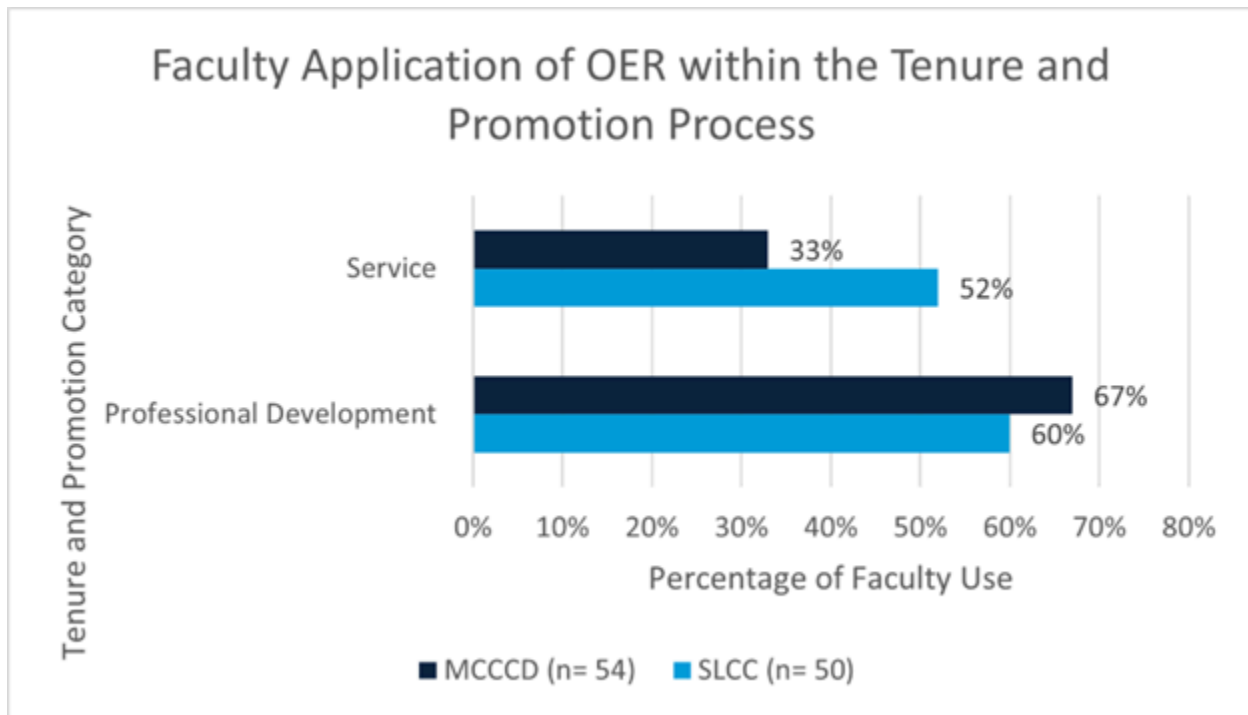


Chart 2: MCCCCD and SLCC Combined Survey Results: Faculty Application of OER within the Tenure and Promotion Process.

Faculty at both SLCC and MCCCCD shared that teaching using OER, and adopting OER were aligned with their instructional/teaching duties. They shared that it could also qualify as professional development if they were learning about OER as they used it. Faculty at these institutions shared,

- “Since this is focused on teaching, it fits best in the teaching category, but if other activities are involved, such as getting trained on the material or serving as course lead for a course using OER content, it could also involve professional development or service.”
- “Choosing to use OER and teach with OER in your classrooms is not related to developing as a professional anymore that choosing a different publisher textbook would be considered professional development. I see the role of teaching as our job regardless of the materials we use.”
- “Requires modifying teaching styles and content.”

In regard to authoring and adapting OER, faculty at the two colleges indicated that it was both service and professional development, as well as instruction/teaching. The sentiments shared were captured in the following quotes:

- “This fits under *teaching*. Since you use this in your teaching, it is part of how you are making your teaching inclusive by being affordable; you can embed OER resources into your Canvas sites. If you *share* your resources with other instructors, then it could also be *service*, and if you had to *learn how to develop/use* these resources, this qualifies under *professional development*.”
- “I saw my purpose in developing a course with OER content as providing a service to others who would use the course more than improving my own teaching, though it probably had a greater impact on the latter.”

Faculty felt strongly that open pedagogy was primarily in the teaching category, sharing,

- “Open pedagogy seems to be...pedagogy...which is teaching philosophy and technique.”
- “Developing pedagogy falls best under “Teaching.” However, developing open pedagogy could potentially require some research and learning. Therefore, it could also fall under “Professional Development.”

The topic of peer review of OER materials garnered strong support as a form of Service and could also be aligned with Professional Development. Faculty at the institutions shared,

- “This associates with service to other faculty (being reviewed) and allows faculty to continue broadening perspective of their field and staying relevant with new material.”
- “I selected Service and Professional Development for this area because someone who reviews materials is going above and beyond the basic requirements as a faculty member. Additionally, as a peer reviewer, you gain important skills and perspective.”

Faculty were nearly evenly split in regard to whether the development of OER ancillary materials was service or professional development, sharing,

- “The creation of OER materials of any kind, including ancillary materials that support teaching and learning, are publishable and shareable, so I count this as Service. This is especially true if I am able to post them in multiple locations.”
- “The development of OER ancillaries, such as additional learning materials, activities, and assessment, can help to further engage students and enhance their learning experience. Using open resources provides a great way for educators to develop meaningful ancillaries that can be used to supplement their courses without incurring high costs. These ancillaries should be designed in a way that encourages active learning and allows students to better understand the

material.”

- “You can still be teaching with OER even if you are not using an OER text. There are many other free online sources that we review and include in our courses. This takes a lot of time and effort to find good resources; check them and then include them in your teaching practices, so this falls under all three categories.”

SLCC’s Full Time Faculty Handbook for Compensation and Workload Appendix 4/5 provides instructions and guidance on the process for SLCC faculty. SLCC faculty are evaluated by three standards: “Standard Professional Performance (expected of all full-time faculty), Exceeds Standard Professional Performance, and Below Standard Professional Performance.”<sup>3</sup> In the service category of the handbook, a list of descriptive examples of exceeding standards is included. While the list is not exhaustive, OER is not included.

In the SLCC Survey Perceptions of OER within the Appointment, Rank, Tenure, Promotion, and Evaluation Process, the following question was asked: “OER is not mentioned in the language of the Faculty Handbook. How do you feel about intentionally addressing OER within the Rank & Tenure (Appendix 4/5) portion of the Faculty Handbook?” Chart 3 highlights 43 percent of the survey participants selected “Improvements are needed, OER is not recognized.”

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3. “Appendix 4/5 Faculty Appointment, Rank, Tenure, Promotion and Evaluation.” *Full Time Faculty Handbook for Compensation and Workload* (<https://faculty.slcc.edu/provost/handbook/index.aspx>). Accessed June 5, 2023.

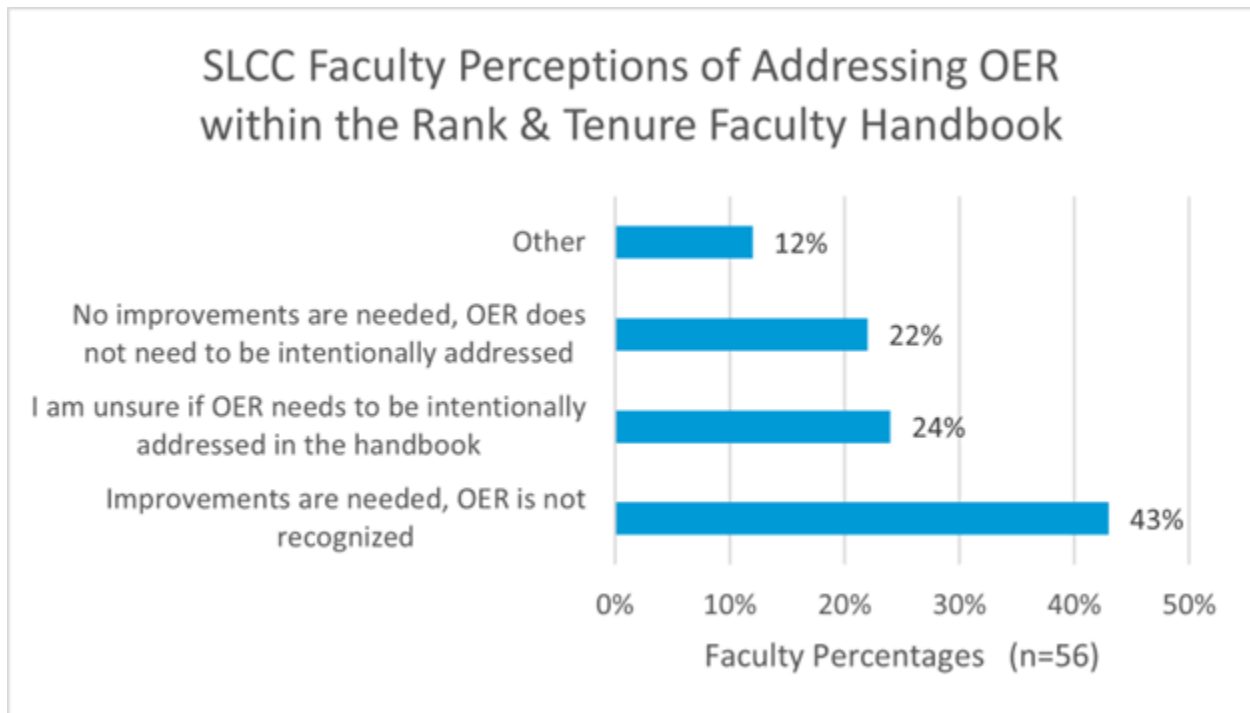


Chart 3: SLCC Faculty Perceptions of OER within the Appointment, Rank, Tenure, Promotion, and Evaluation Survey Results: Faculty Perceptions of Addressing OER within the SLCC Full Time Faculty Handbook for Compensation and Workload Appendix 4/5.

The SLCC survey further explored faculty experiences with justifying OER work within the Tenure, Promotion, and Evaluation process by asking, “Have you experienced any difficulty justifying your OER work or projects to your sitting committee, Associate Dean / Chairs, or Dean?” Chart 4 highlights the total survey participants’ responses with the following: 85 percent were no, 13 percent yes, and 2 percent maybe.

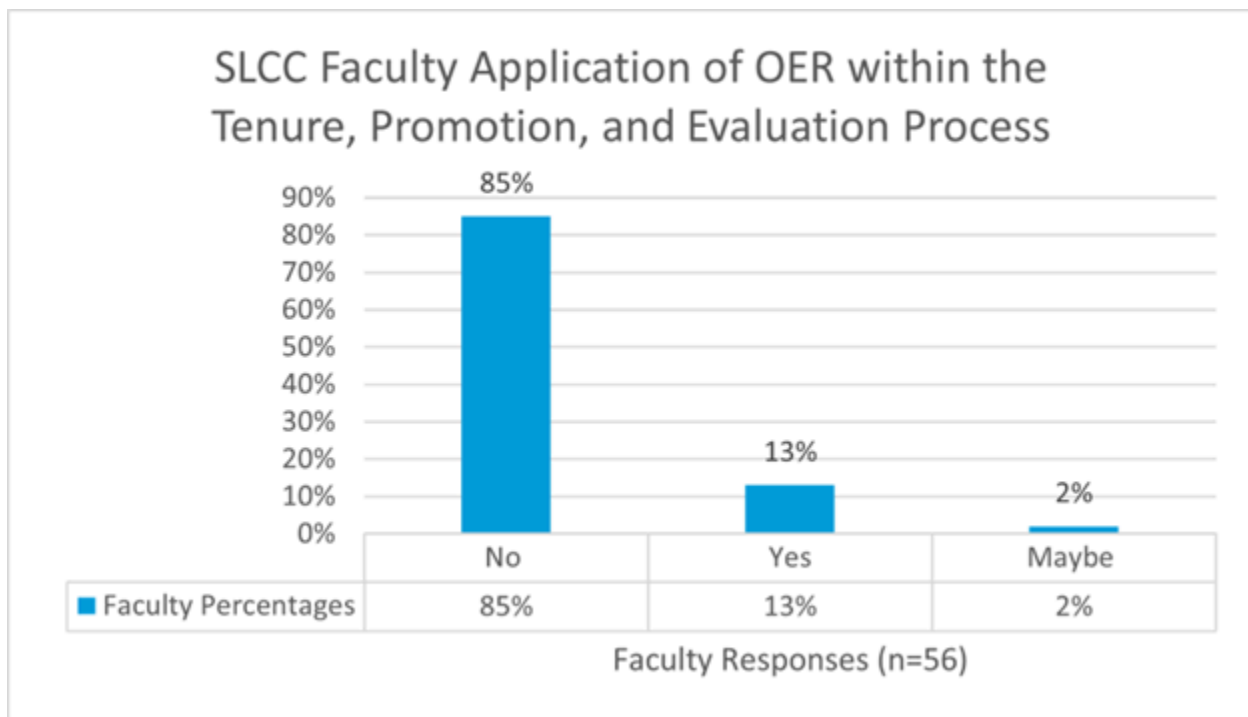


Chart 4: SLCC Faculty Perceptions of OER within the Appointment, Rank, Tenure, Promotion, and Evaluation Process Survey Results: Faculty Perceptions Addressing Potential Challenges of Justifying OER Work or Projects to Their Academic Supervisor and Sitting Committee.

## Recommendations

Based on the SLCC Faculty Perceptions of OER within the Appointment, Rank, Tenure, Promotion, and Evaluation Process Survey results, it is clear that improvements can be achieved.

- Additional institutional conversations will take place to evaluate if adding language to the faculty handbooks is the best course of action.
- The Open SLCC team will develop additional materials to raise awareness for OE applications within the tenure, promotion, and evaluation process.

For OM, there is an opportunity to promote the inclusion of OE work in the IDP for new faculty as well as existing faculty.

- This can be done in the new faculty orientation process, the OM website, and in materials provided when faculty participate in faculty development concerning OE and receive funding for adaptation and development of OER.



# Image Description

**Chart 1 Image Description: MCCCCD and SLCC Combined Survey Results: Faculty Perceptions of the Application of OER within the Tenure and Promotion Process**

Activity	Percent of Faculty Who Classify Activity as Professional Development	Percent of Faculty Who Classify Activity as Service
Development of ancillaries	MCCCCD 43% SLCC 68%	MCCCCD 44% SLCC 64%
Peer review	MCCCCD 24% SLCC 47%	MCCCCD 58% SLCC 83%
Open pedagogy	MCCCCD 36% SLCC 43%	MCCCCD 10% SLCC 13%
OER Authoring or Remixing	MCCCCD 49% SLCC 80%	MCCCCD 44% SLCC 58%
Teaching with OER Content	MCCCCD 42% SLCC 15%	MCCCCD 15% SLCC 12%

[Return to Chart 1]



## PART III

# A UNIVERSITY CASE STUDY: THOMPSON RIVERS UNIVERSITY

This section contains five case studies all from Thompson Rivers University (TRU), a comprehensive regional university located in Kamloops, British Columbia. We've separated out the five TRU case studies into their own section because together they show how the variety of efforts of faculty, administration, and staff interact with one another at one institution. We think that reading these case studies together can give readers a more thorough picture of the complexities of establishing a sustainable and valued OER program.



## Case Study 23.

# Beyond Funding: Examining the Unforeseen Dynamics and Outcomes of Thompson Rivers University's OER Development Grants

Catharine Dishke Hondzel

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**Case study writer:** Catharine Dishke Hondzel, PhD. Former director of the Centre for Excellence in Learning and Teaching

**Institution:** Thompson Rivers University

**Type of intervention:** This case study provides an overview of an open education resource (OER) development and support project aimed at increasing the adaption, adoption, and creation of OER at a mid-sized regional university in Canada.

## Background

Thompson Rivers University (TRU) is a mid-sized, comprehensive regional university located in Kamloops, British Columbia. It is situated in the interior of what is now known as British Columbia on the unceded territory of the Secwepemc Peoples. The university began as a community college in 1970 and gained university college status in 1989, permitting it to offer bachelor's degrees. In 2005, it was amalgamated with the Open Learning Agency under the Thompson Rivers University Act (2005), allowing for the expansion of programs in both in-person and distance-learning formats. TRU offers programs on campus and in distance format through the Open Learning division. The

university serves approximately 25,000 students annually. Programs are now offered from the Adult Basic Education level through to master's degrees. The university has a specific commitment to open education, which is mandated in the act, and the university is required by the act to use open learning methods and serve the open learning needs of British Columbia.

The tenure and promotion process for faculty members is overseen by the University Tenure and Promotion Committee (UTPC). The UTPC approves the university-wide as well as the departmental and divisional tenure and promotion standards and coordinates the adjudication of tenure and promotion applications. It is also the body that recommends the granting or denial of tenure and promotion to the president (TRU, 2022). Departmental committees serve as the first level of adjudication and offer their recommendation to the UTPC. Departmental standards reflect the norms of the departmental disciplines and are expected to be reviewed regularly. The departmental standards also outline, in detail, the role expectations faculty are expected to fulfill. All standards are posted publicly (see TRU Departmental Standards (<https://www.tru.ca/senate/committees/stpc/documents.html>)), and annual workshops and seminars are offered to prepare faculty to put forward portfolios for review.

TRU has three different types of faculty roles, which are assessed by the percentage of normal work according to the role expectations. Tripartite faculty roles include research (40 percent), teaching (40 percent), and service (20 percent). Bipartite faculty are teaching focused (80 percent) with a service expectation (20 percent), and instructional support faculty members fulfill a defined role, such as librarian, educational developer, or instructional designer (80 percent), and perform service (20 percent). Extensive detail is provided in departmental standards as to what this work is and what activities are recognized. At the time of writing, 17 of the 32 standards documents have now been revised to recognized open education-related work in categories of teaching or research;<sup>123</sup> however, there is no obligation in the university's overarching *Principles and Essential Features of Standards Documents* (TRU, 2020) that open educational work to be recognized. Further detail on departmental standards at TRU is provided in the case study by Smith, Harrison, and Clarke Gray in this volume.

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1. Standards and Criteria for Tenure and Promotion: School of Nursing [PDF] ([https://www.tru.ca/\\_\\_shared/assets/School\\_of\\_Nursing\\_-\\_Marc\\_h\\_10\\_\\_202049169.pdf](https://www.tru.ca/__shared/assets/School_of_Nursing_-_Marc_h_10__202049169.pdf))
  2. Learning Design and Innovations Promotion and Tenure Standards [PDF] ([https://www.tru.ca/\\_\\_shared/assets/LDI\\_T\\_and\\_P\\_Standards53626.pdf](https://www.tru.ca/__shared/assets/LDI_T_and_P_Standards53626.pdf))
  3. Department of Human Enterprise and Innovation Standards [PDF] ([https://www.tru.ca/\\_\\_shared/assets/HEI\\_T\\_and\\_P\\_Revised\\_Standards\\_202153323.pdf](https://www.tru.ca/__shared/assets/HEI_T_and_P_Revised_Standards_202153323.pdf))

As the director of the Centre for Excellence in Learning and Teaching (CELT) from 2017 to 2022, my role was to support faculty primarily in their teaching and instructional support roles. CELT offers resources and learning opportunities to support faculty with the aim of improving teaching and learning across the university. These initiatives included collaborating on projects related to open education, including open resources and pedagogy.

## Approach

In 2017, calls to support the integration of OERs into courses being offered at TRU were picking up momentum. Several notable events had brought awareness of OER into the forefront of student activism and academic initiatives. In September of that year, over 1,800 students at the university signed a petition calling for the creation of an Open Textbook Program (TRUSU, 2017). Meanwhile, the provost requested that all faculties and schools review their tenure and promotion guidelines so that open education practices were recognized. Across campus, discussions of what to do to support OER were growing, and faculty were increasingly reaching out to departments across campus with requests for OER support and funding.

Structurally, the university already had built in several supports for faculty who wished to create open resources. These included the support of a dedicated open education librarian, learning technologists who could support Pressbooks (a desktop publishing tool often used for OER), and a small community of champions at TRU who had successfully adapted, adopted, and created open course materials in the past. In addition, BCcampus (<https://bccampus.ca/>), a provincial agency dedicated to expanding open access, offered a textbook repository and OER supports for faculty. However, like many other initiatives at the university, faculty were expected to take on open projects voluntarily. Some were able to incorporate the creation of OER as a means of knowledge mobilization in funded research projects, but many others were projects of passion or necessity designed to create resources that did not yet exist.

What support units at the university frequently heard from faculty members was that there was a desire to engage with OER, but they found it difficult to carve out the time for these projects and were disincentivized by the lack of perceived recognition for very a time- and resource-intensive project. Without widespread recognition of OER in promotion and tenure (P&T) standards documents, the work was difficult to categorize, and for many, it did not count toward career progression milestones. Though faculty feedback was not captured systematically, anecdotally, it

echoed the barriers postsecondary faculty expressed when creating, adapting, and adopting OER that were comprehensively detailed in Jhangiani et al. (2016). Adding to the mix, faculty were facing increasing pressure from their students for free and open course materials (TRUSU, 2017).

In direct response to the calls from faculty and students at TRU, the directors of the three units collaborated to write a joint proposal to create the Open Education Resource Development Grant (OERDG) program. The University Library, the Open Learning division, and the Centre for Excellence in Learning and Teaching all had mandates to serve faculty and collectively recognized that no unit on its own would be able to offer the level of support needed to structure and administrate a university-wide opportunity at the scale required to make a significant difference to faculty and impact the culture of OER at TRU. In addition, the three units already worked well together and understood the importance of an approach that represented the whole campus.

Early in the development of the program, the members of the development team realized that a program would only be successful if it was seen to be of added value to faculty members. Those who wanted to create OER voluntarily for the benefit of their students would always find a way, but that number would be limited to those with the time, energy, or resources to take on projects in addition to their regular workload. For OER work to be fully embraced by more faculty at TRU, there needed to also be a practical reason to choose OER instead of another type of work. For this reason, it was decided that the program would be designed in such a way that it would mirror the competitive internal research grant program. This way it would be clearly recognized in all faculty and school P&T standards, both those that had already revised their P&T standards, and faculties and schools that had not.

In early 2018, directors from each unit sent a collaboratively written OERDG proposal to the university provost as part of a strategic internal grant program the university offered for new and emerging staff-led projects. This initial modest proposal was to be comanaged by the three units and offer five faculty grants, worth \$8,000 each. The funding was allocated for a one-course (three credits or equivalent) release, a small travel stipend, and in-kind technical support, including copyright review and editing, from the Open Learning division. In the initial year of the project, we received 16 applications for the grant. Given this, the provost provided additional funding, bringing the total to seven grants in the first year. Seeing the first year as a successful pilot, in 2019, the units collaboratively submitted a multiyear proposal for funding, extending the call to 10 projects a year for a total grant cost of \$80,000. This second funding proposal was approved and included a provision to reassign a faculty member expert in OER as a dedicated facilitator for the OERDG. The facilitator



offered regular workshops and resources for faculty applying and scoping their projects as well as acted as a consultant for faculty during the term of their grant. In these early days, there was great excitement as the program continued to grow; however, despite the outward success of the program, a few cracks were beginning to emerge.

## Results

After four successful rounds of grants, in 2022, the OER grant program funding was suspended by the university. At that point, 37 projects had been funded for a total investment of around \$325,000 CDN. Upon reflection, there were several reasons why the program ended. One major reason was that OERDG had received significant pushback from the Open Education Working Group (OEWG), which is a campus-wide interest group supporting open educational practices on campus. The OEWG, composed of faculty and staff at the university, argued that the decentralized manner in which the grant was run made it difficult to support the increasing size of the projects being proposed (Monroe & Clarke Gray, 2022). The OEWG described structural barriers to the program as well as uneven workload and lobbied the university provost to pause the program.

Moreover, we discovered that the amount of funding offered by the grant was not equivalent to the amount of work required by faculty to complete the OER projects, especially for those who proposed the creation of a new resource. As discussed by Monroe and Clarke Gray (2022), funding was not flexible enough to meet project timelines, as it was tied to the university's fiscal year, and the pockets of interest and expertise within faculties ebbed and flowed throughout the years. It was determined that a significant reorganization of the administration of the program would need to happen, with the recommendation that a centralized unit be put in place that would also oversee the development of open pedagogy, open research, and open publishing. If successful, that initiative may also open the door to concurrent work with departments to incorporate language around the open education in all promotion and standards documents, providing opportunities for it to be recognized for those who do not hold an internal grant. Centralization may also offer the opportunity for staged implementation over multiple years, avoiding the fiscal year cutoffs that departmental budgets are subject to, regardless of the stage of the project.

It is clear from the direct feedback that the leadership team solicited that the role of the facilitator was instrumental in helping faculty scope and manage projects, and feedback collected from participating faculty members strongly indicated that without the facilitator, they would not have moved as far on

their project as they had proposed to. Even with that support, several projects were abandoned during the pandemic and as faculty shifted roles and responsibilities or research interests. One indicator of the overextension of the project is that to date, only 22 of the proposed 37 projects have been published as OER in the BCcampus Open Textbook Collection.

Overall, the grant program was successful in increasing interest in OER adaptation, adoption, and creation, which is something the three units continue to be proud of. It absolutely heightened the interest of faculty in OER in direct and indirect ways, and celebrating faculty members' accomplishments, including their creation of new resources, remains a point of pride for the university. Though the momentum created by the OERDG was unable to be sustained, for the period of time in which it existed, it filled an important gap, and the 22 projects that were published will continue to make a positive difference to instructors and students well into the future. It remains to be seen how institutional resources will be redeployed and if or how opportunities for faculty to continue this work will exist in the future.

## Recommendations

- **Work collaboratively:** Working across departments was essential in having a campus-wide impact. Each partner brought their own resources and strengths, and the collaborative nature of the project made it easier for the provost to approve funding because there was widespread buy-in.
- **Think strategically:** The inclusion of OER in promotion and standards documents was fostered by the development of a grant program that resembled internal research grants. When faculty could speak about an OER grant with the same language as a research grant, it was much easier to see how it fit in P&T standards and reflected academic work.
- **Grow carefully:** One of the reasons this program was not sustainable was because it grew too big too quickly. The popularity of the program encouraged the leadership team to keep adding opportunities; however, the applicants were likely not fully aware of the work involved in completing the project, and because this was not the core part of anyone's job, no one was fully aware when grant holders were slipping behind.
- **Recognize the effort:** The program was popular because it was an opportunity to have time or funding to complete work that had typically been seen as "above and beyond." By bringing faculty into a named grant program, they were recognized, and their work was made visible. By recognizing the work, it also helped extend the visibility of the program across the campus.

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## Case Study 24.

# Asking For It: The Importance of Advocacy in Establishing Open in Tenure and Promotion Processes

Michelle Harrison; Brenna Clarke Gray; and Brenda Smith

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### **Case study writers:**

- Brenna Clarke Gray, Coordinator, Educational Technologies
- Michelle Harrison, Senior Instructional Designer and Assistant Professor
- Brenda Smith, Open Education Librarian

**Institution:** Thompson Rivers University

**Type of intervention:** How to implement language about and support for open education in tenure and promotion standards documents.

## Background

Thompson Rivers University in British Columbia, Canada, has a legislative mandate to support open learning, and its institutional values are based on the principle of open access to education (Thompson Rivers University Act, 2005; Thompson Rivers University, n.d.a.). Its campus-based faculty have either bipartite (teaching/professional role and service) or tripartite (teaching/professional role, research, and service) appointments. These structures led to an environment that bred faculty interest in and support for open education. Advocacy for open led to two major initiatives in 2018: the development of an active faculty-driven Open Education Working Group

(OEWG) that advocates for open education initiatives across the institution and the establishment of an OER development grant program that provided financial support for faculty wanting to integrate OER into their teaching. The implementation of Canada's Tri-Agency Open Access Policy on Publications—which requires all peer-reviewed journal articles that were funded in whole or in part by Natural Sciences and Engineering Research Council of Canada (NSERC), Social Sciences and Humanities Research Council of Canada (SSHRC), or Canadian Institutes of Health Research (CIHR) to be made publicly available within 12 months of publication—had also increased institutional and faculty interest in open (Science and Innovation Canada, 2016). TRU faculty have also received multiple open education grants from BCcampus, a provincial body for supporting open practices in postsecondary education, which created expertise and interest in open activities.

As more TRU faculty engaged in open education practice, they wanted their work to be explicitly recognized in the tenure and promotion process. The announcement that the University of British Columbia (UBC) had included language and standards about open education for tenure and promotion in 2017 galvanized the conversation about how we could do something similar at TRU (Yano et al., 2018).

## Approach

In the fall of 2019, it was noted that many of the tenure and promotion departmental standards documents were in need of revision. The provost sent out a memo in November to the deans and faculty council chairs about the need to update standards documents and provided a revision schedule for the various departments. As highlighted by Skidmore and Provida (2019), a lack of formal policy or guidelines related to open education work within the tenure and promotion process was seen as a possible barrier to further faculty work and engagement. This was recognized by both faculty and senior leaders. Inspired by the UBC example, the provost and members of the University Tenure and Promotion Committee discussed how to implement explicit support for open at TRU. It was decided that rather than having one general, overarching statement recognizing open work, this language would be included in the revised departmental standards so that the language could be framed in discipline-specific terms. Each department was encouraged, with help from open education experts (if desired), to include language around open that represented their disciplinary focus and needs.

To date, departments in the Faculty of Science, Faculty of Arts, School of Business, School of

Nursing, Learning Design and Innovations (LDI), Faculty of Culinary, Adventure and Tourism Management, and Faculty of Student Development have included language in their assessment of teaching/professional role and scholarship to varying degrees (Thompson Rivers University, n.d.b.). Most departments include criteria under their “leadership in teaching activities” sections and directly reference the “development and dissemination of OERs and repositories including open-source textbooks.” Others provide more detail and include specific evidence for each rank in both roles (assistant, associate, and full teaching professor/professor), which reflects an increasing sphere of influence and expertise. For example, the Faculty of Science outlines criteria for each rank, starting with “*incorporating* OER, open tools and data or open educational practices (OEP) into course materials and course design” at the assistant rank, to *evaluating, assessing and adapting* at the associate rank, and to working with communities to *create* at the full professor rank (Faculty of Science, 2021, p. 8). The LDI department, which includes faculty members in instructional design, educational development, and learning technologist roles, has the most explicit criteria for both their practice and scholarship. Criteria in the section “Scholarship in the professional role” explicitly references the development and dissemination of open pedagogies, platforms, and materials and specifically references dissemination in open access outlets (Learning Design and Innovations Department [LDI], 2021, p. 7). These standards, and those modeled after them, which includes other instructional support faculty, also include explicit language for scholarship in a tripartite role, which states, “We would like to emphasise the importance of dissemination that supports open and collaborative practice, including open access publishing, the development of Open Education Resources and texts, and the creation, documentation and sharing of open process and/or open data” (LDI, 2021, p. 10). Of the 21 standards documents that have been revised since 2020, only one does not have an explicit reference to open education.

## Results

While the progress our institution has made with embedding open in tenure and promotion practices has been both significant and welcome, there are still barriers that emerge in taking a truly open approach to this work. A key component of the ongoing work of open advocates at TRU is to educate our colleagues about open practice and scholarship. Tenure and promotion standards documents, even when they are explicit about the value of open, are still subject to interpretation by faculty evaluators. Establishing a broad, campus-wide understanding of the value of open ensures that an evaluatory context is not the first time faculty evaluators are encountering these discussions.

Often, barriers to further exploring openness in tenure and promotion are formal and reflect the rigidity of the process as it has been traditionally understood, and as such, they impact not only open scholars and practitioners but also the ability of the process to respond to equity, diversity, and indigenization (EDI) needs. For example, while open work may be welcomed or even celebrated depending on the discipline, the traditional tenure and promotion portfolio is by design a closed form. Nothing in the standards or processes at TRU expressly stops the candidate from opening up their portfolio, but this does represent a duplication of effort, as the open portfolio will not be evaluated because it does not match the formal requirements (a specifically structured folder of PDF files, saved to the university's enclosed shared drive system). This means that candidates with a community responsibility to share their work are doubly burdened; there are also, increasingly, EDI-related questions about who is served by confidential processes within the institution, especially since the sector has not achieved equity in successful moving candidates through tenure and promotion (Jones et al., 2013; Knight, 2010; Lawrence et al., 2014). Open is not a salve, but opening out the process in the interests of transparency may be a step toward improving equity. Making it optional for faculty to openly share their T&P portfolios may therefore be worthwhile, depending on the work being represented in the portfolio.

The Learning Technology Team at TRU supports the development of open portfolios by providing WordPress (an open-source content management system) server space and a predeveloped template to any interested faculty; this is based on the existing architecture created for student e-portfolios and other open web projects. Basic WordPress training and support is also available. The first faculty member on this team to go through the tenure and promotion process used the template to produce an open portfolio: Brenna Clarke Gray's Portfolio for Tenure and Promotion (<https://tenure.brennaclarkegray.ca/>). Providing space, support, visibility, and models to challenge the singular view of the portfolio as a collection of PDFs does not resolve the duplication of work burden, but it does offer another way to think about portfolios for tenure and promotion for those whose story is not best told by static documents.

## Conclusion

In building openness into the tenure and promotion process at TRU, we note the central role of advocacy at every stage: the Open Education Working Group has sought funding for and recognition of open work, the student union has articulated the value of open for students, TRU has benefited from past senior leaders with a strong sense of open's role in advancing equity, and individual faculty

members have taken on the mantle of open champions in a variety of ways. Institutional change is slow, but by embedding advocacy for open across the institution, change to an inherently conservative process like tenure and promotion has been possible.

However, change is not unipolar. As leadership shifts and new strategic priorities emerge and as committee makeup evolves over time, we do not yet know if our work to establish open as a key component of tenure and promotion at TRU will hold. New leadership has yet to articulate a vision for openness at TRU, and some established practices, like the OER development grant program, have come to a close. Standards documents are revised at TRU every seven years, so the next round of revisions will help us determine whether these changes will persist. We will maintain our advocacy and education and continue to celebrate the work of our open education champions and, when possible, work to enshrine open in process documents. We have demonstrated that cultural change can happen; now, we seek to sustain it into the future.

## Recommendations

- Open is best recognized through a combination of administrative leadership and encouragement and faculties and departments establishing what open means within their disciplines.
- A broad cross section of the university community needs to be engaged, including student groups, in conversations about open and its value in teaching and scholarship so that faculty evaluators have a strong understanding before they first view portfolios.
- Advocacy of open needs to continue to encompass new members of the university community and to embrace changes in the open movement in order to make sure that open's presence in and relevance to tenure and promotion standards is sustainable.

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## Case Study 25.

# OER Journey Contribution to Tenure and Promotion

Izabela Mazur

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**Case study writer:** Izabela Mazur, Associate Teaching Professor

**Institution:** Thompson Rivers University

**Type of intervention:** This case study outlines how my contribution toward OER impacted my application for tenure and promotion.

## Background

As an associate teaching professor working at Thompson Rivers University (TRU), I work for the University and Employment Preparation Department (UEPrep), which offers Adult Basic Education (ABE) courses for upgrading students. TRU has institutional documents that guide the tenure and promotion process. When applying for tenure and promotion, it is essential to know TRU Faculty Association Collective Agreement Article 6, Senate's Principles and Essential Features of Standards Documents, and Departmental Standards. To apply for tenure and promotion, one must be in a tenure-track appointment. The first tenure-track appointment is for three years and is up for renewal after a successful performance review for the additional three years. During those six years, one must first apply for tenure to the rank he or she is in and after (or at the same time), apply for promotion. When applying for tenure and promotion in the UEPrep department, one must provide evidence of meeting or exceeding the UEPrep teaching and service standards for tenure and promotion. When I had applied, I was in a tenure-track, bipartite appointment. Therefore, my application was evaluated

based on the following weighting: 80 percent to teaching and 20 percent to service. Unfortunately, the departmental standards do not include OER. Being in a bipartite appointment, it was hard for me to decide where to include my OER contribution. I ended up successfully including my contribution to OER in both teaching and service standards.

According to BCcampus statistics, TRU is one of the top five adopting institutions in BC. TRU supports open education initiatives by providing grants, coordinating projects, organizing workshops, and showcasing OER. Many faculty members and administrators are among the leaders in OER grants and completed OER projects. In the last two years, five TRU members received the BCcampus Award of Excellence in open education. I am one of those members who received the award.

I have been teaching algebra and precalculus courses for the UEPrep department for the last 19 years. The textbooks for those courses are very expensive, with an average of \$230.00 for a single one, and some students simply could not afford to buy it. I am grateful that in 2018, I was first introduced to the idea of OER. This intrigued me so much that shortly after, I was reading related research on OER, reviewing open textbooks, comparing the outcomes, and thinking of adopting an open textbook for one of my classes. Around the same time, I got involved in the Adult Basic Education Zero Textbook Cost Committee (ABE ZTC). My journey with OER began with my goal to make zero-cost pathways for all math courses at TRU. I am close to my goal.

Since 2018, I have been involved in three different OER projects supported by BCcampus and TRU. I was a recipient of two BCcampus grants and two TRU grants. For my first project, I adopted an open textbook for the Advanced Algebra level. I piloted the use of OER in my MATH 0510 Algebra 2 course, which is provincially articulated as the Advanced Algebraic course. For my second project, I adapted an open textbook for the Intermediate Algebra level. In 2019, I received an OER BCcampus grant (\$1,000), and in 2020, an Education and Social Work Dean's Research Grant (\$4,000) to develop an open textbook for the Intermediate Algebra level. My open textbook, *Introductory Algebra*, was published on March 26, 2021, and it is now available in the BCcampus catalog. My last OER development was to create an open textbook for Advanced Business Technical Math. I was working on this project with Kim Moshenko, my TRU UEPrep colleague. In 2019, I received an OER BCcampus grant (\$1,000) to create six groups of learning outcomes organized in chapters in the textbook. To further support our project, we received the TRU OER Developmental Grant (\$5,000) in 2020 to hire research assistants. Our open textbook, *Business/Technical Mathematics*, was published in September 2021.

## Approach

There is no doubt that my OER accomplishments were instrumental in the fulfillment of my teaching and service departmental standards for tenure and promotion to the rank of associate teaching professor. I will share some examples of promotion criteria from the UEPrep standards that I made detailed arguments for in my application for promotion.

When adopting, adapting, and developing OER, I have been fully engaged with the curriculum design and revision at both the local and provincial levels. I worked with the ABE curriculum and the BC Articulation Guide to make sure that the coursework that I developed covers all articulated learning outcomes and is a quality resource for other ABE educators. When first adopting OER, I was lucky enough to find a quality open textbook that covered most of the outcomes, but I still had to create supplementary materials, cover missing outcomes, and create my own resources for the assessment. I developed the trigonometry chapter and created a corresponding workbook where students can work through the examples. I included real-life examples and replaced locations listed in examples with names of places in British Columbia. When adapting and creating OER, the work was more substantial and challenging, as I had to create a lot of new content, since there was no open content that I could adapt.

My work on the adaptation of the open textbook, *Introductory Algebra*, and my contributions to open education were awarded in April 2021, with the BCcampus Excellence in Open Education. Winning the BCcampus award helped me demonstrate my excellence in course development. Furthermore, the BCcampus Award for Excellence in Open Education was evidence that my enthusiasm, dedication, and perseverance in open education was recognized provincially. One of the supporting letters stated, “As a result of all her marvelous work, Izabela very deservedly won the BCcampus Award for Excellence in Open Education.”

When mentoring other faculty members, teaching and service roles overlap. Over the years, I have had many opportunities to share my instructional and curricular knowledge and resources with my ABE colleagues across BC. In a letter supporting my application for tenure and promotion, it stated, “She has been a tremendous resource and support to other instructors who are adapting or creating resources.”

When working on my OER projects, finding the time and learning about Pressbooks and Latex was challenging. Thanks to the TRU Dean’s Research grant, I was able to hire two research assistants to

help me with Latex. They both were grateful for all the support, mentoring, and experience. One of the comments from my annual professional report was “Your willingness to work with students as research assistants in relation to OER also demonstrates your commitment to teaching others and learning from others.”

Looking back on my projects, the development of the resources has not always been easy; however, it has been very rewarding. I learned a great deal from others while mentoring and providing support. For example, as the math lead at the ABE ZTC Committee, I took an active role in guiding the direction of the project. I worked as a consultant between BCcampus and the applicants for math OER proposals, reviewing proposals and giving recommendations. I was fully engaged in the work of this committee and used my curricular knowledge and expertise to guide this project. Reflecting on my contributions, one commented, “As the mathematics subject lead, her contributions on this committee were fundamental to guiding the direction of the ABE ZTC project.”

In 2019, I served as a reviewer for two open textbooks: *Intermediate Algebra* and *Algebra and Trigonometry*. I reviewed those open textbooks, filled in rubrics, and gave recommendations. I also reviewed and provided recommendations for work submitted for the OER proposals.

My advocacy for OER also gave me a great opportunity to seek and accept opportunities to share curricular knowledge at the local, regional, and provincial levels. In 2021, I accepted many opportunities to share my curricular knowledge at the local and provincial levels. In February 2021, I copresented “Breaking Barriers to Embrace Open Educational Resources” at TRU Teaching Practice Colloquium. Later in March, I was an invited panelist that presented “My OER Journey” during the TRU Open Educational Resources Showcase. I next presented “Using Open Educational Resources (OER) in Your Teaching” for the Adult Basic Education Association of British Columbia Conference in April 2021. Lastly, I was an invited panelist and presented “My OER Journey” in June 2021 at the BCcampus Adult Basic Education Open Educational Resources Showcase.

My involvement with OER provided professional service to the public with many contributions through presentations as previously stated above. Following my BCcampus Excellence in Open Education Award, I was invited to contribute to an interview with TRU Newsroom and an interview with NL Radio. I was also featured on the website of the BCcampus News.

## Results

There have been many rewards and positive outcomes resulting from my involvement with OERs that were crucial in providing evidence in my tenure and promotion application. First, my hard work and dedication toward these OER projects have resulted in more than \$70,000 in savings for TRU students. Not only have I published two OER textbooks; I also provided instructors with an alternative quality free resource and students with free access to education resources, which gives me a great deal of satisfaction. My OER development contributed to student success and more accessible education. Here is one of the supporting comments: “I believe that Izabela’s passion for both her students’ academic success and helping reduce the cost of their education helps fuel her drive for creating high-quality and accessible resources.” Another supporting comment from my promotion portfolio is “Congratulations on the publishing of your OER textbook for Intermediate Algebra as well as being a recipient of the BCcampus Excellence in Open Education Award. Both of those accomplishments are outstanding and to know you are about to have a 2nd OER published shows your dedication to ensuring that students have access to education. You should be proud of these accomplishments!” The BCcampus statistics indicate that the textbook has been well used. Shortly after my first textbook was published, I received an email saying, “I wanted to let you know that I will be piloting your textbook for intermediate math this fall with my classes. You have done such a fabulous job and the tremendous work you have put-in is reflected by the text!... I am planning to create an online course with it.”

My involvement with OER development broadens my sphere of influence on the local and provincial levels. It gave me opportunities to seek and accept two local and two provincial opportunities to share my instructional and curricular knowledge in the development of OERs. I grew professionally. One of the comments from a supporting letter summarizes very well my professional growth, stating, “Being awarded the April BCcampus Award for Excellence in Open Education reflects your ongoing professional growth as a post-secondary educator. You have gained the respect of your provincial ABE math colleagues, and, as a result, your work has made TRU the leading-edge ABE Open Ed Math developer in BC.”

## Recommendations

As a result of my experience with OER and my successful application for tenure and promotion, I

argue that OER contribution needs to be appropriately valued in the process of tenure and promotion. It would be beneficial for OER to be embedded in institutional or departmental standards. After my experience, my recommendation to the committee that currently works on our departmental standards is to include the use of OER in both teaching and service standards. I am hopeful that they will implement my suggestions based on my experience in this area. This will enable future applicants to not be afraid to highlight OER in their tenure and promotion portfolio.

Even though my tenure and promotion was successful, I am continuing my work in OER by improving my existing OER. I am also being supported by the Education and Social Work (EDSW) dean's office to create an open textbook for provincial-level algebra and trigonometry. I still feel that more advocacy and more financial commitment to open education activities are needed. It would be great if in the future we would have an OER community where there will be countless opportunities for collaboration and research for open education activities.

## Case Study 26.

# OER as the Key to Tenure and Promotion

Christine Miller

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**Case study writer:** Christine Miller, Associate Teaching Professor

**Institution:** Thompson Rivers University

**Type of intervention:** OER at the heart of ABE (Adult Basic Education)

## Background

Thompson Rivers University (TRU) is a public, NWCCU-accredited university nestled in the interior of British Columbia, Canada. With a student population of about 27,000 enrolled in both online and on-campus programming, TRU serves students in the region and internationally with its main physical campus in Kamloops, British Columbia, several smaller satellite campuses scattered throughout the region, and robust online/distance programming. TRU operates according to the University Act that guided its creation, with several purposes, including offering Adult Basic Education, baccalaureate, and master's degree programs; engaging in research and scholarly activities; promoting teaching excellence and open learning methods; and serving the educational/training needs of the region.

TRU has evolved over its 50-year history from its roots as a vocational/academic college (Cariboo College, created in 1970), to its rise as a university college (University College of the Cariboo) in the late 1980s, to its amalgamation with BC Open University to become a full-fledged university (TRU) in 2005. Governance at TRU is tricameral—a board of governors oversees corporate decisions, the senate makes academic decisions, and the Planning Council for Open Learning (PCOL) is



responsible for oversight and operationalization of distance and online learning. TRU has deep roots in open educational practice through the Open Learning division and institutionally through faculty commitment to OER.

I am an associate teaching professor in the University and Employment Preparation Department (UEPrep) within the Faculty of Education and Social Work (EDSW). I began my employment with TRU as a sessional instructor seven years prior to receiving a bipartite tenure-track position within the department in 2017. I applied for tenure and promotion in 2021 and was granted both in 2022. As a bipartite faculty member, I teach Adult Basic Education (abbreviated as ABE and also referred to as University Preparation or UPrep) level biology and general science, with a heavy focus on provincial-level biology, an equivalent to grade 12 biology, which many students take to prepare themselves as they apply to health care programs.

I am very involved in service at many levels in the university with several leadership roles. I currently serve as university preparation program coordinator and faculty council co-chair and am the Open Educational Resources Development Grant (OERDG) coordinator. This is in addition to many other service roles where I am/was a contributor and/or committee chair.

## Brief Description of the T&P Process at TRU

The tenure and promotion process at TRU is governed by our collective agreement, with standards that vary by department. To apply for tenure and/or promotion, a candidate must prepare a portfolio that shows evidence of how they meet each of the requirements. The collective agreement lays out specific items that must be included in the application portfolio, including the following:

- A letter of application
- A CV
- A teaching dossier
- A service dossier
- A scholarly/research dossier, if applicable
- A minimum of three annual professional activity reports
- A list of at least six potential external reviewers

If any of these components are missing, the application will not be considered. It is incumbent on the

applicant, with these items and other types of evidence/examples, to outline how they meet the criteria for tenure and/or promotion with respect to their departmental standards documents.

There is a strict timeline, outlined in the collective agreement, for the submission and adjudication of an applicant's portfolio. In August, a faculty member notifies their departmental chair and dean that they plan to apply. A complete application portfolio is submitted to the dean's office in September. The portfolio is adjudicated by three external reviewers and the Departmental/Faculty/School Tenure and Promotion Committee (DFSTPC). The DFSTPC reaches a decision, taking into consideration the feedback from external reviewers and their own findings on the application. They then forward their recommendation to both the applicant (for their information) and the University Tenure and Promotion Committee (for adjudication). The UTPC sends their recommendation to the president for review, and then the president will notify the applicant with notice of whether they were successful in their application.

Individuals who obtain a tenure-track position have a maximum of six years in which to apply for tenure. It is common for tenure-track faculty to apply for both tenure and promotion in the same application.

What is not explicitly stated but is expected is that an applicant for tenure and/or promotion show an increasing sphere of influence both within and externally to the institution. In addition, a portfolio should show a progression from being a practitioner, to being a manager, to being a leader, whether in the scholarship of teaching and learning, program-specific development, and/or scholarship.

## Overview of OER Activities at TRU and Author's Roles in Those Activities

TRU has a rich history of participating in and supporting the use and creation of OER. See the timeline below for some milestones in TRU's participation in and contribution to OER in the last decade.

I was first introduced to the concept of OER by our OER librarian, Brenda Smith, at a 2017 information session she was running to promote adoption/adaption by individual faculty in their classroom teaching. She encouraged me to apply for the OER Development Grant—a then-brand-new grant administered jointly by the Centre for Excellence in Learning and Teaching, the library, and open learning. I received this grant to work on my very first OER project—an open textbook

adaptation for provincial-level biology. From there, I went on to partner several times with BCcampus (<https://bccampus.ca/>) to work on a variety of projects, including two open courses and a stock photo collection.

My enthusiasm for creating OER eventually led me to accept the role of OER Development Grant Coordinator (2021–2023)—a support position put in place in response to OERDG recipients reporting a need for more supports as they went about adopting/adapting and creating open content. This role involves helping faculty apply for the grant, helping successful applicants get organized (set timelines, do check-ins) and access the help they need when they run into problems, as well as training sessions for Pressbooks, H5P, and Creative Commons Copyright.

## Approach

### Arguments the Author Made for Their OER Work in T&P Application

OER is not named in my department's T&P standards documents, union collective agreement, or the Senate's guiding principles for T&P. I had to figure out how to make my contributions to open fit into a system guided by a series of documents that were drafted before open was ever recognized, in a way that wasn't a stand-alone but was woven into who I am as an educator, a colleague, and a biologist. As a bipartite faculty member, my tenure and promotion application was assessed with a specific weighting—80 percent on teaching and 20 percent on service. I wanted to be sure to show that creating and using OER fit into both categories as evidence of my excellence in teaching and curriculum development and as my contribution to the field of ABE.

Development of OER was a critical theme for my application for T&P—as part of my personal philosophy of education, and evidence of excellence in teaching, and for outlining my increasing sphere of influence. My work in OER was varied—a textbook adaptation, two open-source courses (lecture slides, students notes pages, lab manuals, test banks), a stock photo collection (Indigenous Peoples in Education), and a collection of scientific diagrams.

OER appeals to me as someone who is creative, loves to share, and wants positive change in society. I see the value of OER for students and instructors—reducing barriers to education related to cost and creating easily accessible teaching resources for instructors who may just be starting a new teaching

role or are looking at improving curriculum. I also see OER as part of equal access to information and education—these are not things that should be hidden behind passwords or \$400 price tags. These values/sentiments ended up embedded in multiple areas in my application portfolio. I made my first argument for the inclusion of OER contributions in my application letter with the following statement: “My work in open educational resources (OERs) reflects my desire to contribute not only to student success and academic access but also to the discipline of Adult Basic Education (ABE).”

Dedication and contribution to OER permeated my application and portfolio from beginning to end. My teaching philosophy statement showed my commitment to eliminating achievement gaps through lowering student costs and to indigenizing curriculum as reflected in my OER work. I evidenced teaching excellence by highlighting my curriculum-specific resources that have been adopted nationally and internationally through various sharing platforms. I used my OER as confirmation of educational leadership and mentorship—showing how my work in OER has influenced the adoption of OER across BC institutions offering ABE sciences.

## Process Mostly, Results Less

Since using OER as evidence of meeting my department’s standards for tenure and promotion had not really been done before, I had to be very intentional about tracking my impact on students, colleagues, and the field of ABE. Below, I outline some of the difficulties inherent in evidencing the impact of OER and the ways in which I was able to overcome this.

BCcampus funded many of my projects, and it was very helpful to have my work showcased in their high-quality collection (BCcampus Collection can be found here ()). It made my work visible and accessible, as well as provided a way for me to track some amount of the adoption of my resources, the textbook adaptation in particular. A barrier I came across in documenting the adoption of my textbook *Human Biology* (<https://humanbiology.pressbooks.tru.ca/>) across the province, however, was a low rate of reporting of adoptions. I had shared the textbook at the BC ABE Articulation Science Working Group, and through discussion with colleagues, it seemed that around 10 institutions had adopted the textbook—unfortunately, only 2 institutions had reported the adoption to BCcampus, which meant that I was unable to provide evidence of the true sphere of influence I was trying to show in my application. In addition, the TRU-hosted Pressbooks didn’t allow me to track information about the number of times my book URL was accessed—again, making usage tracking very difficult. In the end, while I was able to show my book had been downloaded/printed/adopted a

certain number of times through BCcampus, what I presented as evidence in my portfolio grossly underrepresented the use of the textbook in my field.

I had shared my collection of biology-related diagrams (<https://commons.wikimedia.org/w/index.php?title=Special:ListFiles/Christinelmiller&ilshowall=1>) through Wikimedia Commons, and this was an interesting juxtaposition to sharing through BCcampus. Wikimedia Commons facilitated better use tracking; I was able to access how many times each image was viewed (not just downloaded or a reported adoption) per month, and as long as I checked monthly, I had very reliable statistics on how often an image was accessed. For example, I had ended up creating a PNG file of the periodic table, since I had trouble finding one with a Creative Commons license that had just the right amount of information on it. This graphic, created in 2018, is viewed between 500 and 1,000 times per month and has been since I first posted it. However, while Wikimedia Commons provided a very wide audience, it was hard to show that I was contributing to my field of ABE specifically.

Another complication I had to work with while using my contributions to OER in my application was the length of time it takes to complete an OER. Many of my projects involve years of work, and I applied for T&P after four years—meaning that I had to show that all my OER (completed, in-progress, emerging) were important and impactful. To do this, I relied on new adoptions, interinstitutional collaboration, and showing how my emerging work was filling very important gaps (i.e., the stock photo collection).

## Results

I am very proud of how I wove my work in OER into T&P processes and standards drafted before “open” was integrated into TRU’s T&P policies and standards. My application for both tenure and promotion was successful, and I feel that TRU as an educational and academic community is overall very supportive of open initiatives. This may be due to our roots as both an access-oriented and distance/flexible learning institution.

We are now in the throes of revising our departmental standards for T&P. One of my main goals in this process is to include OER in the standards documents as an example of how an individual might show excellence in teaching, learning, and service so that I can pave the way for OER enthusiasts coming up the ranks.

I am also committed (as in it’s my 10-year dream) to have an entire suite of ABE courses that are zero

textbook cost. We have already made some serious headway in the sciences and maths, and I'd like to continue and expand that good work—to support students in accessing education by reducing cost barriers. I also hope to work with educators across the province to adopt resources that are ABE specific, adaptable, and meet the needs of both new and experienced instructors.

## Recommendations

If you are going to use OER in your tenure and/or promotion applications, here are my best recommendations:

- Start small—you don't have to dive right into the deep end of OER. Start with an adoption, then think about adaptations or creations!
- Share! When I first developed my resources, I didn't picture anyone else ever really wanting them. However, I presented my projects at the ABE Science Articulation Group, and it quickly became apparent that there was a need for OER, especially in ABE. This presentation quickly led to invitations to present elsewhere, invitations to collaborate, and ideas about what was needed next.
- Be neurotic about tracking adoptions, downloads, usage, and so on. People adjudicating your package understand numbers, and the more data you have, the less you have to work to convince people that you are having an impact on students and colleagues.
- Get involved with groups/communities dedicated to open at your institution and beyond. I would not have had the same opportunities for grants, supports, and mentorship without the wonderful group of OER enthusiasts I had the great fortune to work with at TRU and BCcampus—our open education librarian, the director for the Centre for Excellence in Learning and Teaching, the Open Education Working Group, and my case manager with BCcampus. All these people helped and supported me and were critical in my OER journey.

## Case Study 27.

# Integrating OER as Critical Pathway in Social Work Teaching Philosophy and Practice

Bala Raju Nikku

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**Case study writer:** Bala Raju Nikku, PhD, Associate Professor, Faculty of Education and Social Work

**Institution:** Thompson Rivers University: University

**Type of intervention:** This case study aims to document the application and champion OER as a critical component of teaching, research, and service in seeking tenure and promotion by a newly immigrated, racialized social work faculty member in a Canadian university.

## Background

Founded in 1970 as a Cariboo college, the institution evolved over the years and became a university in 2005, incorporated through Thompson Rivers University (TRU) Act and amalgamated with Open Learning Agency. In 2020, the university celebrated its 50th anniversary and granted 80,000 credentials since its founding.

TRU adopted a new vision statement in the spring of 2020 following extensive consultation that Envision TRU held throughout the region. Community-minded with a global conscience, we boldly redefine the university as a place of belonging—Kw'seltnéw's (we are all related and interconnected

with nature, one another, and all things)—where all people are empowered to transform themselves, their communities, and the world.

I arrived in Vancouver, Canada, in 2018 as a skilled immigrant on a permit to work as a social work faculty (tenure on track) at Thompson Rivers University, Kamloops Campus as a racialized scholar and a member of an equity-denied, visible minority community.

With about 15 years of administrative, social work teaching, practice, and research work experience from Asia, with a doctoral degree in the social sciences from the Netherlands, I bring a wealth of work and lived experience to my social work teaching and practice in Canada.

I acknowledge that I am a humble guest on the unceded lands of Tk'emlups te Secwepemc territory within the traditional unceded lands of Secwepemcúl'ecw (Secwepemc Nation). In this space, I continue to share knowledge and learn respectful ways of living, knowing, and being and working through teaching, learning, research, and service.

The territorial acknowledgment that I continue to practice is one of the ways to decolonize social work teaching and practice. Including OERs is another step forward in this process. Over these years, navigating many potholes and speed bumps, I have gained insights into the Canadian higher education landscape within the larger neoliberal institutional practices and the issues of equity, diversity, and inclusion for racialized faculty members. Since day one, it has been a steep learning curve, professionally and personally.

## Approach

I teach social work from an integrated narrative, anti-oppressive, social justice, and critical consciousness framework. This approach aligns with the core mandate of the OER movement—that is, practicing open and critical pedagogy—providing affordable access to culturally and professionally relevant education.

Recognizing OER work valuable for the tenure and promotion (T&P) process is a persistent conundrum, as T&P rules and benchmarking vary widely across departments within the same institution. Nevertheless, thanks to the Centre for Excellence in Learning and Teaching (CELT) and the Faculty of Education and Social Work, I had the opportunity to attend the orientation sessions for faculty who are preparing for T&P. These meetings were valuable but, at times, increased the level



of anxiety, as these sessions highlighted the need for meticulous preparation and a concrete plan to work and not to mention risking the job if the application is not successful.

I quickly understood some similarities but also huge differences between the procedures and expectations around seeking a T&P in Canada compared to the institutions I worked in Asia, especially Nepal. As a result of these reflections and thinking, I understood that spending untold hours toiling to submit a successful T&P application was not uncommon. I am not alone in this process. I was also aware that coming from more oral traditions and a culture of earned recognition rather than contracts and proving evidence, the task of seeking a T&P in a Canadian context will offer me many challenges and a steep learning curve.

I eventually submitted my T&P portfolio according to the university's criteria, rules, and standards for tenure and promotion in 2022. As a nonnative, non-English speaker, I reassured myself that preparing the documentation for the promotion or tenure would be a very time-intensive, reflective process. I was constantly reminded of the risks of losing a job if my tenure application failed. I strictly adhered to the T&P guidelines and continuously verified and selected the best evidence to show how I met the standards. This diligence finally paid off, and I have been awarded tenure and promoted to associate professor beginning June 1, 2023.

## Activities and Results

Over these years (2018 to 2022), I took opportunities to hone my teaching practices, research skills, and service areas in that I have strengths and made logical steps forward. In these professional development and excellence efforts, I discovered critical open pedagogy as one of many avenues that aligned with my teaching philosophy and a critical approach that helped me illustrate my accomplishments and productivity across teaching, research, and service, leading to a well-developed T&P portfolio.

I have integrated different activities into the T&P using the OER Contribution Matrix, a bottom-up model.

Contribution	Evidence	Research	Teaching	Service
Use of OER in my teaching	Please see the curriculum outlines for the evidence, including the zero textbook costs statement.		Yes	Yes
Use of open access to research articles from journal and book chapters	I enclosed a document that lists the open access journal articles and book chapters that were used in the course outlines.	Yes	Yes	
Member, TRU—Open Education Working Group and Open Publishing Community of Practice (COP)	I enclosed emails and grating award documents showing evidence that I am an active member of the COP and the OER grant, leading to the OER textbook work in progress.	Yes	Yes	Yes
UN Sustainable Development Goals (UNDG) Open Pedagogy Fellowship in 2021 and contribute to raising awareness of the value of OER	I documented the evidence of completion of the UNDG fellowship and the outcome: UN SDG Goal 16: Student Work ( <a href="https://pressbooks.montgomerycollege.edu/unsdggoal16studentwork/">https://pressbooks.montgomerycollege.edu/unsdggoal16studentwork/</a> ).		Yes	Yes

I completed the CELT teaching fellowship from 2019 through 2020, which further helped me understand and practice curriculum mapping and aligning the course goals that include open pedagogical practices within the more significant institutional priorities.

My participation in the Open Education Working Group at TRU allowed me to join the open publishing and OERs communities of practice. Subsequently, I received an OER grant in 2022 to work toward bringing an OER textbook on international social work (SOCW4800). Writing this textbook is a work in progress. When the textbook is completed as an OER product, I continue updating the content of the text and ensure free and open access for TRU and students globally. I documented my work around this as a case to show evidence of OER's adoption, adaptation, redesign, and application in practicing academic freedom, open scholarship, and reflective teaching practice.

I also documented my active participation and successful completion of the UN Sustainable Development Goals Open Pedagogy Fellowship in 2021, which led to a joint publication of an open press book with two USA colleagues from the same cohort of fellows. I provided the link to our press book as evidence in my T&P portfolio by providing the evidence and weaving them to show my commitment to OER practices and how they aligned with my teaching philosophy: UN SDG Goal 16: Student Work (<https://pressbooks.montgomerycollege.edu/unsdggoal16studentwork/>).

From 2018 through 2022, I revised and taught 13 courses, and more than 200 students have taken these courses. In addition, I practiced a zero-textbook policy by providing a set of curated OER and open access but library-licensed resources. By doing so, I argued that students could save about C\$12,000 (200 students  $\times$  \$60 minimal textbook cost). I further argued that using OER resources and open books is a critical building block in tailoring knowledge to the diversity of students in our classrooms and reducing financial barriers. This is another example of how OER practices have been crucial to my teaching at TRU.

I then documented the formal presentations I made about insights that resulted in integrating OER into my teaching in various forums. For example, I gave an invited keynote in August 2020, titled *Decolonizing the Pedagogy and Practice of International Social Work*, at the International E-Conference organized by Pandit Madan Mohan Malviya, National Mission of Teacher Training, and Mahatma Gandhi Fuji Gururji, Centre for Social Work, Mahatma Gandhi, *Antarrashtriya Hindi Vishwavidyalaya*, India. I also presented with other colleagues during the open education week at TRU (March 2021) titled “OER: More Than Open Textbooks Showcase,” which my peers received well. The invited opportunity to present my work shows evidence of an increasing sphere of influence of my work globally.

The word OER appeared 13 times in the T&P portfolio that I submitted. I believe that the T&P committee members have taken note of my reflections and arguments that integrating OER work in my teaching is critical to me in making my classroom a space for practicing equity, diversity, inclusion, and decolonization, resulting in the democratic classroom experience, which I have stated in my teaching philosophy. For example, in reviewing my portfolio, an external reviewer said, “Dr. Nikku’s interest in furthering their teaching skills is also attested by their attendance in several professional development activities; specifically, their involvement in CELT Teaching Triangle with an interdisciplinary team is very innovative. Dr. Nikku is working with teaching colleagues to strengthen inclusive education in Canada and South Asia. Notably, Dr. Nikku has contributed to the scholarship of teaching. For example, Dr. Nikku has received an Emerging SoTL Scholar Grant and Open Education Resource (OER).”

Through these roles and as an open education and critical pedagogy practitioner, I continue to learn and practice OER in my teaching. By doing so, I contribute to the OER movement at the institution.

I further argued, perhaps indirectly, if the overall purpose of tenure is to ensure academic freedom and provide enough economic security to make the profession attractive. Here I am as a racialized

immigrant, a visible minority, who has practiced OER as a tool, strategy, and part of my identity that aided me in grounding myself and fulfilling the roles of a teacher-scholar.

The interactive learning between the classroom dynamics and myself, the teacher, and among the diversity of students has been a rewarding experience for me over these years. In addition, I am witnessing and proud that many more colleagues are championing the OER at TRU. I am collaborating with another colleague to pilot playback theater as an open, free, interactive nonscripted theater tool to facilitate equity, diversity, and inclusion in classroom teaching and dynamics. There is always a critical mass of people that is needed to bring change. As a result, slow but positive changes are happening at my institution, both policy and cultural change supporting OER as a critical building block that leads to crucial recognition during T&P evaluations and practices.

## Recommendations

- Recognize OER practices in T&P institution-wide guidelines.
- Allocate and invest dedicated policy and financial resources to encourage the integration of OER in teaching, research, and service.
- Create professional development events and opportunities to gain advanced OER practices.
- Promote recognition and awards for championing innovations in OER.
- Provide mentoring opportunities through the OER community of practice.

# APPENDIX A: THE OER CONTRIBUTIONS MATRIX

Amanda Coolidge; Andrew McKinney; and Deepak Shenoy

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A critical part of sustaining Open Educational Resources (OER) in higher education is recognizing the contributions by instructors who create and improve them as part of their professional work. In order to aid this effort, Driving OER Sustainability for Student Success (DOERS3) has developed an adaptable advisory model to help guide faculty as they attempt to include their OER work in their tenure and promotion portfolios. This model is in no way exhaustive and will likely be most useful as either a way for faculty to start thinking about how to best fit their OER work into their local T&P guidelines or as an OER adapted to those local concerns. Although this document in its current form was created with individual faculty in mind, we encourage T&P committees themselves to adapt and edit this document to use as guidance for their faculty.

We are aware that each T&P process is based on one's local institution and its guidelines. Although individual institutions or departments may differ from this matrix in its categories, we have found that most variations of tenure and promotion guidelines can be adapted to teaching, research, and service.

While few institutions have recognized open educational practices as deliverables toward tenure and promotion, faculty, in documenting their OER work in their portfolios, should characterize their work using these terms to aid their colleagues in understanding their contribution.

For each contribution, we have suggested whether the contribution could apply to those three categories, and in some cases, we have marked multiple categories—which is most relevant will depend upon the context. In addition, the matrix includes examples of how faculty might think strategically about where their open education contributions would be valued most and how best to frame those contributions.

In 2023, the OER Contributions Matrix was translated into French by the Canadian Association of Research Libraries' Open Education Working Group (<https://www.carl-abrc.ca/advancing-research/scholarly-communication/open-education/oewg/>) task group on francophone OER, to encourage

francophone and bilingual universities in Canada to start the conversation about making OER count for tenure and promotion.

- OER Contributions Matrix in French (Cadre de reconnaissance des contributions REL) ([https://www.doers3.org/uploads/1/3/2/2/132273765/cadre\\_de\\_reconnaissance\\_des\\_contributions\\_rel.docx](https://www.doers3.org/uploads/1/3/2/2/132273765/cadre_de_reconnaissance_des_contributions_rel.docx))

To download a copy of the matrix, please visit the DOERS3 website (<https://www.doers3.org/tenure-and-promotion.html>).

<b>Adopt</b>				
<b>Contribution</b>	<b>Evidence</b>	<b>Research</b>	<b>Teaching</b>	<b>Service</b>
Use OER in a class or classes	Survey and gather data on how the use of an OER in class affected student learning. A similar study ( <a href="https://files.eric.ed.gov/fulltext/EJ1146242.pdf">https://files.eric.ed.gov/fulltext/EJ1146242.pdf</a> ) was conducted in British Columbia as in the United States via the Open Education Research Group ( <a href="https://link.springer.com/article/10.1007/s11423-016-9434-9">https://link.springer.com/article/10.1007/s11423-016-9434-9</a> ).		Yes	
Use Open Access research article	Provide evidence of the Open Access journal articles that were used in course outline		Yes	
<b>Adapt</b>				
<b>Contribution</b>	<b>Evidence</b>	<b>Research</b>	<b>Teaching</b>	<b>Service</b>
Revise others' OER to be more relevant to student needs.	Survey students in class to learn more about the impact the revised materials have had on their learning. A similar study ( <a href="https://www.google.com/url?sa=t&amp;rct=j&amp;q=&amp;esrc=s&amp;source=web&amp;cd=&amp;ved=2ahUKewiogc-rk6PrAhXyJzQIHQB3BjkQFjABegQIBxAB&amp;url=https%3A%2F%2Ffiles.eric.ed.gov%2Ffulltext%2FEJ1146242.pdf&amp;usg=AOvVaw2L2oitmreKPeBTFeM1vuYC">https://www.google.com/url?sa=t&amp;rct=j&amp;q=&amp;esrc=s&amp;source=web&amp;cd=&amp;ved=2ahUKewiogc-rk6PrAhXyJzQIHQB3BjkQFjABegQIBxAB&amp;url=https%3A%2F%2Ffiles.eric.ed.gov%2Ffulltext%2FEJ1146242.pdf&amp;usg=AOvVaw2L2oitmreKPeBTFeM1vuYC</a> ) was conducted in British Columbia.		Yes	Yes
Revise or remix OER to be in alignment with course learning outcomes	Provide evidence on what was revised or remixed to best suit the course learning outcomes. Survey students in class to learn about the impact the revised materials had on their learning.		Yes	
<b>Create</b>				

Contribution	Evidence	Research	Teaching	Service
Make new OER	When creating OER make it available to peers for their review. Document their reviews and include in your dossier. The following is a common rubric ( <a href="https://open.umn.edu/opentextbooks/reviews/rubric">https://open.umn.edu/opentextbooks/reviews/rubric</a> ) used to review open textbooks.	Yes	Yes	
Improve Learning				
Contribution	Evidence	Research	Teaching	Service
Improve student outcomes	To best understand the improvement of student outcomes, increased student engagement, innovation, and reduction in cost – survey students in your course. Review the survey and questions included in “A multi-institutional study of the impact of open textbook adoption on the learning outcomes of post-secondary students ( <a href="https://link.springer.com/article/10.1007/s12528-015-9101-x">https://link.springer.com/article/10.1007/s12528-015-9101-x</a> )”.		Yes	
Innovation			Yes	
Increasing student engagement			Yes	
Reduce material costs to students				Yes
Community				
Contribution	Evidence	Research	Teaching	Service
Mentoring others in OER	Provide recommendation letters from mentorships and via the mentee			Yes
OER leadership (change culture, policy change, lead an initiative)	Provide a list of committees and specific actions you took related to OER and committee work. For tasks led, describe the initiative, provide evidence of change, and seek references and recommendation on the work completed.			Yes



Disseminate knowledge about OER	Provide list of workshops, webinars, presentations related to OER and OE advocacy.			Yes
Peer review existing OER	Provide citations of the reviews conducted.		Yes	Yes
<b>Research</b>				
<b>Contribution</b>	<b>Evidence</b>	<b>Research</b>	<b>Teaching</b>	<b>Service</b>
Scholarship of Teaching and Learning (SOTL) about OER	Provide citations and links to work completed related to SOTL and OER.	Yes	Yes	
Conference presentations	Provide citations, links, recordings, and slides of the work done to disseminate OER knowledge.	Yes		Yes
Grant writing	Provide excerpts from grant proposals, including budgetary asks and narrative as to how the grant will benefit the department and/or institution.	Yes	Yes	

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## Editor

Andrew McKinney

## Author

Edited by Andrew McKinney

## Contributors

Dr. Kelly Arispe  
BOISE STATE UNIVERSITY

Shawna Brandle  
KINGSBOROUGH COMMUNITY COLLEGE

Emily Carlisle-Johnston  
UNIVERSITY OF WESTERN ONTARIO

Cheryl (Cuillier) Casey  
UNIVERSITY OF ARIZONA

Carina Chernisky  
UNIVERSITY OF HAWAII

Junie Hayashi  
UNIVERSITY OF HAWAII

Soledad Lencinas  
UNIVERSITY OF HAWAII

Beth Tillinghast  
UNIVERSITY OF HAWAII

Jason Yamashita  
UNIVERSITY OF HAWAII

Sharon Clapp  
CENTRAL CONNECTICUT STATE UNIVERSITY

Angela Walker  
EASTERN CONNECTICUT STATE UNIVERSITY

Cailean Cooney  
CUNY NEW YORK CITY COLLEGE OF TECHNOLOGY

Catharine Dishke Hondzel  
THOMPSON RIVERS UNIVERSITY

Elaine Correa  
CALIFORNIA STATE UNIVERSITY, BAKERSFIELD

Alexander Reid  
CALIFORNIA STATE UNIVERSITY, BAKERSFIELD

James Dovel  
SHEPHERD UNIVERSITY

Kathy Essmiller  
OKLAHOMA STATE UNIVERSITY

Craig Finlay

UNIVERSITY OF NEBRASKA AT OMAHA

Isabel Soto Luna

UNIVERSITY OF NEBRASKA AT OMAHA

Michelle Harrison

THOMPSON RIVERS UNIVERSITY

Brenna Clarke Gray

THOMPSON RIVERS UNIVERSITY

Brenda Smith

THOMPSON RIVERS UNIVERSITY

Alishia Huntoon

OREGON INSTITUTE OF TECHNOLOGY

Christina Hendricks

UNIVERSITY OF BRITISH COLUMBIA

Will Engle

UNIVERSITY OF BRITISH COLUMBIA

Stacy Katz

CUNY LEHMAN COLLEGE

Brian Lindshield

KANSAS STATE UNIVERSITY

Izabela Mazur

THOMPSON RIVERS UNIVERSITY

Christine Miller  
THOMPSON RIVERS UNIVERSITY

Bala Raju Nikku  
THOMPSON RIVERS UNIVERSITY

Felix Kayode Olakulehin  
NATIONAL OPEN UNIVERSITY OF NIGERIA

Michael Paskevicius  
UNIVERSITY OF VICTORIA

Doralyn Rossmann  
MONTANA STATE UNIVERSITY

Brian Rossmann  
MONTANA STATE UNIVERSITY

Leila Sterman  
MONTANA STATE UNIVERSITY

Christina Trunnell  
MONTANA STATE UNIVERSITY

Ashley Sergiadis  
EAST TENNESSEE STATE UNIVERSITY

Angela Spires  
COLLEGE OF SOUTHERN NEVADA

Nicolas Simon  
EASTERN CONNECTICUT STATE UNIVERSITY

Lisa Young

MARICOPA COUNTY COMMUNITY COLLEGE DISTRICT

Andrea Corbett Scott

SALT LAKE COMMUNITY COLLEGE

Amanda Coolidge

BCCAMPUS

Deepak Shenoy