

# Gateways to OERs

## Scaffolded Strategies for Success

**T**his article is focused on Phase Three of a multi-phase project aimed at breaking down barriers to open educational resources (OER) at Penn State Altoona. Phases One and Two, featured in a *C&RL News* article in 2022, were centered on strategies to find, secure, and promote library-licensed e-books as a mechanism to bridge faculty to the idea of open access.<sup>1</sup> With that foundation in place, the next step is to transition faculty members to greater independence with OERs. This phase employs the use of a two-year Action Plan with seven goals designed to meet that end. Each goal helps to raise a higher awareness of and increased support for the adoption of OERs. Collectively, these measures will support our objectives of increased student retention and attracting new students to our campus by offering zero or low-cost course materials.

### Phase Three Goals

The seven goals of the Action Plan are scaffolded to build momentum among faculty. It is an intentional plan, beginning with low-stakes goals that build upon each other to achieve high-stakes goals aligned with our university and libraries strategic initiatives. In addition to the timeframe and goal description summarized below, each goal is further detailed in the Action Plan to include Specific Steps Needed, Potential Collaborators and Resources, Potential Barriers, Questions/Issues to Resolve, and Desired Outcomes.

Goal 1: By the end of fall 2022, design and distribute a faculty survey to determine what OER support they value the most.

Goal 2: By the end of fall 2022, design and distribute a student textbook survey to determine impact of cost and to ask students to self-identify if they would like to volunteer with a Student OER Advocacy Group.

Goal 3: By the end of each semester starting with spring 2023, oversee a Student OER Advocacy Group (with library work-study students and students recruited from the survey).

Goal 4: By the end of spring 2023, increase faculty awareness in the online Barnes & Noble Adoption and Insights Portal (for textbooks and course materials adoption) and, by the end of Fall 2023, recruit faculty participants in the Course Marking Initiative Pilot (CMIP) developed by the University Libraries OER Working Group. (This group examined the University of Kansas's course-marking model,<sup>2</sup> assessed the status of course-marking efforts at Penn State, and developed a CMIP proposal vetted by the University Faculty Senate and the Administrative Council on Undergraduate Education. The key outcome is to implement student-facing course-marking as a matter of policy in LionPath, the student information

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system.) This two-part goal is high stakes. Faculty training in the Barnes & Noble Adoption and Insights Portal will increase cost transparency to enable students to plan for course material costs during registration and before they are financially committed.

Goal 5: By the end of fall 2023, redesign and promote the existing OER Library Guide to incorporate what faculty need and value the most, as well as upcoming opportunities and publicity tied to goals six and seven. While this is not a high-stakes goal, the timing is strategic to be able to draw on the experiences and lessons learned thus far.

Goal 6: By the end of spring 2024, launch the first annual Open and Affordable Showcase (a half-day conference to recognize and celebrate OER-related work on the campus, and to advance the importance of the resources regarding student access, affordability, and retention). This is a high-stakes goal that will provide faculty with the opportunity to share, learn, and create synergy by evaluating each other's efforts and contributions. Tied to the seventh goal, these faculty champions will nominate and select a winner to be featured as a Textbook Hero on the library's website.

Goal 7: By the end of fall 2024, initiate Textbook Heroes publicity (public acknowledgement of Altoona faculty who've increased access to and affordability of required course materials by implementing and advocating for OER and other zero or low-cost course materials.) This is a high-stakes goal inspired by the University of Kansas's successful Textbook Heroes Campaign launched in 2019.<sup>3</sup> Each featured hero will receive a certificate, and a letter will be sent to their supervisor outlining the benefits of OERs and the relationship of this work with the promotion and tenure process.

## Goal Implementation

During the implementation of each goal, unexpected benefits and challenges arose. For example, the opportunity to engage in the OER Leads Adoption Program (detailed in the following section) had a significant impact as did the appointment of a new, visionary chancellor. But at the same time faculty demands outside of the scope of the established goals, as well as sustaining a Student OER Advocacy Group, required further consideration. Progress on implementing each goal is detailed below.

Goal 1: The faculty survey was designed with Qualtrics. It was emailed to the faculty list, sharing that the survey had five questions, should take less than two minutes to complete, and would be open for 10 days before the 2022 winter break. Out of approximately 300 faculty members, 55 responded, but not to each question. This survey yielded two key findings:

1. Faculty currently using OER materials communicated it to students by linking OER materials in Canvas and including a statement in their course syllabus.
2. Faculty are most interested in more information on how to search required textbooks as ebooks in the library catalog and exploring options to adopt or adapt OER materials.

Goal 2: The student survey was designed as a simple holiday-themed handout in keeping with other holiday activities before the 2022 winter break. It was available in the library for one week to capture a sample group who received candy for their survey submission. With 46 students voluntarily answering eight questions, four findings rose to the top:

1. If students only buy some or none of the required textbooks, it is because they want to wait to see if they need them.

2. If students buy any textbooks, they buy used copies from Amazon or another online source.
3. Students prefer free ebooks over purchasing print textbooks.
4. Students want more information on OERs and want their instructors to offer them.

Goal 3: The Student OER Advocacy Group was formed with a core group of library work-study students. The students were incentivized to engage with OER-related projects while on paid time and recruit like-minded friends to volunteer time. During two semesters the students accomplished creating promotional digital signage, distributing “No Cost” and “Low Cost” buttons for the student Involvement Fair and the faculty CMIP, and providing a student perspective on the redesign of the OER Library Guide. Two work-study students competed for and received monetary outreach awards from the University Libraries for their contributions and scholarly work.

Goal 4: Six faculty members attended training for the Barnes & Noble Adoption Insights Portal, and a recording of the training was made available to all faculty. The spring 2023 training also included a refresher on e-books, OERs, and an invitation to participate in the fall 2023 CMIP. The training was then taken “one the road” at each academic division meeting at the start of the fall 2023 semester. Invitations were emailed to all faculty to complete a survey for any spring 2024 course sections that were either no-cost (no cost to the students for all course materials) or low-cost (all combined course materials cost less than \$50). Approximately one in six responded, representing about 120 course sections of the nearly 670 courses anticipated to be open for spring 2024 (ultimately, some sections were not opened or were canceled due to low enrollment).

Goal 5: At the start of the spring 2024 semester, the OER Library Guide was streamlined to feature items typically asked for by faculty.<sup>4</sup> This revision included a reduction from 30 OER platforms to a recommended list of eight commonly used broad collections. Additions to the guide included promotional information on the Open and Affordable Showcase and the Textbook Heroes, as well as recommended external partners and practitioners. The work-study students suggested developing a video tutorial on foundational OER content to support faculty new to open education initiatives. While this recommendation was not acted upon, it is under consideration for the next annual revision for 2025.

Goal 6: The half-day Open and Affordable Showcase cast a spotlight on seven lightning talks, two roundtable discussions, and one video address to “spark” open conversations. Topics included ebooks, course marking, annotation tools, writing OER modules, and several others of high interest. Participants celebrated the efforts and contributions of each other and voted to select a Champion for 2024. The Champion transformed her course to exclusively zero or low-cost materials and laid the foundation to shift to open pedagogy.

Goal 7: During the summer and fall of 2024 the Champion at Penn State Altoona, as well as other locations with similar initiatives, were recognized by the university publicity and a plaque was provided for each campus to add names to each year. To capture the momentum of 2024, a new webpage featuring all Textbooks Heroes who participated in the Showcase was developed for the Altoona homepage. Additionally, planning is underway to create a centralized Textbook Heroes webpage in 2025 where Champions and their significant accomplishments at each campus may be easily searched in one place.

## Discussion

During the timeframe of implementing the seven goals of the Action Plan, Penn State Altoona appointed a visionary chancellor keen on expanding OERs. This support came at a time when another window of opportunity presented itself—the University Libraries OER Leads Adoption Program expanded to include Altoona. This collaborative program is a community of librarians who *lead* OER efforts across multiple Penn State Library locations. Ten Altoona faculty members who best met the criteria of this grant-funded project were selected to collaborate with a librarian to transition to OERs during summer 2023, fall 2023, or spring 2024, with each receiving a \$500 stipend. As of fall 2023, OER Leads librarians supported the adoption of OERs into 34 courses across eight Penn State locations.

Yet not all faculty answered the call consistently. Surprisingly, several faculty members asked for impromptu support outside of any initiatives that were offered. On the other side of the spectrum, both internal and external demands on time prevented several other faculty members from shifting their courses to open and affordable even if they wished to do so. Similarly, sustaining the Student OER Advocacy Group was challenging. Most of the students were committed to other student organizations, held jobs, and had hectic academic schedules. Their passion for open initiatives was restrained by these factors, slowing progress on an otherwise hopeful student initiative.

## Next Steps

With the completion of Phase Three's two-year Action Plan, many Penn State Altoona faculty members are well on their way to greater independence with OERs. Moving forward, the first three goals related to surveys and student advocacy will fall away. The fourth goal will move to the purview of the campus registrar, since student-facing course-marking is now a matter of policy, and the last three goals will remain, since these are the thrust of faculty support, promotion, and recognition.

While thriving, the OER Leads Adoption Program underwent modifications. For 2024–2025 the model remained centered on a community of librarians who lead OER efforts across multiple Penn State locations. The stipend increased to \$1,000 for each accepted faculty member; however, only 20 seats were available across all 24 Penn State locations. Vetting became more stringent, and acceptance carried additional expectations. To ensure that a cohort of Altoona faculty could continue to receive support, Altoona's Academic Affairs agreed to offer \$500 stipends to five faculty members who best met the criteria without additional expectations beyond transitioning to zero or low-cost course materials. This funding is committed for 2025–2026 as well. Four Altoona faculty members applied for the Altoona stipend and were accepted. One Altoona faculty member applied for the university-wide stipend but did not secure a seat. As an alternative, that faculty member was offered (and accepted) the last stipend at Altoona.

A natural progression from the completed multi-phase OER project is open pedagogy. Planning is underway to investigate the best path on how to promote and assist faculty members with integrating inclusive shared learning into their curriculum. Inclusion in open education is more than zero or low-cost textbooks. Further conversations will seek to frame inclusivity as shared learning centered in social justice through a fully open educational experience. //

## Notes

1. Lori Lysiak, “Division by Division, Book by Book using Licensed E-books as a Gateway to OERs,” *College & Research Libraries News* 83, no. 3 (2022): 110–13, <https://doi.org/10.5860/crln.83.3.110>.
2. “Marking Affordable Courses at KU,” the University of Kansas, accessed December 12, 2023, <https://marking.ku.edu/>.
3. “Textbook Heroes,” the University of Kansas, accessed December 12, 2023, <https://lib.ku.edu/>.
4. Lori Lysiak, “Open and Affordable Educational Resources,” Penn State University Libraries, last modified December 14, 2023, <https://guides.libraries.psu.edu/altoona/oaer>.