Keynote Address
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OER: The Student Success Multiplier Effect
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Good afternoon.

It’s hard to believe that we have been working together on this OER journey for nearly two years and that this is our third (and final… if we think about the length of this journey being tied only to the grant funding…which none of us will do) convening.

You, as a member of 38 grantee college teams from across the U.S. are part of a bold effort, an effort that is still one of the most ambitious OER projects to date, to build OER degree pathways using openly licensed course materials in place of proprietary textbooks. Our approach makes us unique. This OER degree initiative work builds in scale from the start, an ingredient we learned must be part of any reform design to move the completion needle. Most OER efforts are single-faculty, single-course efforts that are not connected. Requiring colleges to build full and aligned degree programs with OER builds in connection and scale. This approach makes this work challenging. And, you have risen to the occasion. Currently, there are 52 degree pathways under construction, with many of you building more than the one pathway that the grant requires.

Before I move deeper into my remarks, I want to offer thanks to our funders. The Hewlett Foundation is leading the investment team. Great Lakes and Gates are funding the evaluation, an important element of this work if we are to reach our goals to influence the field with what we are learning together. And, funding from two smaller and less known foundations, Shelter Hill and Speedwell, provided ATD with important seed money to organize for this effort while we secured the larger funding. Please join me in thanking this extraordinary group of funders.

I also want to recognize the 11 colleges participating with us over the next few days who are not grantee colleges and are also engaged in scaling OER on their campuses. They are a unique blend of institutions—some are leading ATD colleges, a few are from British Columbia (we know there is exceptional OER work underway in Canada), and not all are working on associate degree pathways, only. A few are universities and
community colleges offering bachelor’s degrees. Please join me in welcoming our new colleagues to this convening.

Finally, I want to thank the members of the ATD OER team, especially Richard Sebastian and Fran Carpenter, for their leadership. They both have deep professional and personal passion for advancing this effort.

Getting Started

I want to start my remarks this afternoon with a short exercise designed to help us reflect on what is making us uncomfortable, at this moment, with our OER work. It is in being uncomfortable that we make our most progress as individuals and as organizations as long as that “uncomfortableness” does not move us into a panic zone.

Take out a piece of paper and draw one circle and inside it label it “comfortable.” Around that circle draw another circle and inside that part of the circle label it “learning.” And, now, around than circle, draw another circle and inside that circle label it “panic.”

You have just drawn Noel Tichy’s learning zone framework, a framework that helps us see that if we don’t set deliberate intention to move ourselves or our organizations out of the comfort zone and into the learning zone, we won’t set the stage for any individual or organizational growth.

Since it is baseball season (and hope springs eternal for all teams right now including mine…the Orioles…), I’ll share one of my favorite quotes on being uncomfortable, from professional baseball player and manager Lou Pinella. While scouting one young player, he wrote this in his notes: “He has all the skills. He is a five-tool player. But he won’t make it because he is not comfortable with being uncomfortable.”

I think there are some important insights in these words for us. Our colleges, our faculty, may have all the fundamentals in place, all the tools for success in designing our OER work, but if we are not comfortable with being uncomfortable, we won’t succeed with scaling and sustaining this work.

Let’s go back to your diagram. Take a few minutes to individually reflect on pieces of the OER work that are in the comfort, learning, and panic zones, for you individually or for your college. Jot these reflections down near the relevant parts of the diagram.

Now take a few minutes to share your reflections with your colleagues at your table.

Does anyone want to share? Ideally, let’s try to get a reflection from each table.
The Multiplier Effect

I have titled my remarks, *OER: The Student Success Multiplier Effect*, because I, like you, see the enormous potential of OER when we strategically design it with students at the center of our design thinking AND when it is intentionally and comprehensively braided into our organizational strategies (strategic plans) to improve access and completion.

![2018 DREAM Student Scholars](image)

Let’s start with the student story. I know you have them. I have them from my days at Montgomery County Community College—students who shared textbooks; used textbooks on loan at the library; bought used textbooks, tore them apart, and put them back together again to match the new textbook version; priced textbooks and strategically crafted their schedules to afford tuition and books; and/or turned the heat off one month to pay for textbooks the next month.

I share the stories of three students profiled in recent national news on OER. When Jasmine Roberts was an undergraduate at the University of Michigan, textbooks almost crippled her financially. When she could not afford one book, she asked her professor to put it on reserve in the library. He did it, but followed up by saying: “Jasmine, if you can afford to attend the University of Michigan, you can afford this textbook.” She reflected at SXSW EDU a few weeks ago on a panel that now, as a faculty member at Ohio State University and an advocate for OER, “[that faculty member] had no idea what it took for me to get to the University of Michigan.”

She goes on to say, “it is now my job to make sure my students do not feel how I felt that one day in my professor's office.” Roberts lamented, too, about the 40 percent of low-income students who are admitted to college each spring but who don’t make it to campus because of the costs. (Williams, Jake, *How OER can overcome the higher education equity barrier*, *EdScoop*, March 5, 2018)

And, then there is the story of John McGrath, a Rutgers University student, as told in a January article in *The Atlantic*. John pays close attention to his expenditures and before
entering the store, he had researched all his textbook options: new, used, rental. John waited in line at the bookstore for 40 minutes, clutching a list of four classes, and walked out with an armful of books, some bundled with digital codes that he could use to access assignments on the publishers’ websites. He exited the store with a $450 charge. His plan for savings was disrupted by the need to purchase the digital codes—codes sold exclusively at his bookstore, and for a steep price. John points out, “now I have to pay to do my homework.” (McKenna, Laura, *Why students are still spending so much for college textbooks*, *The Atlantic*, January 26, 2018)

And, finally, there is Melissa Hoch, an adult student, working in a low paying job returning to college to upgrade her skills. With few resources for college given pressing family expenses, she who turned to Tidewater Community College’s zero textbook degree. She says: “Because of Tidewater’s ZTC-degree, I did not have to choose between continuing my education and buying braces for my daughter.” Melissa is now a graduate of Tidewater and Old Dominion and is working as a logistics coordinator. (Plotkin, Hal, *College Promise Programs and Open Educational Resources: A Winning Combination*, *Forbes*, February 2018).

These student stories point to the power of OER, to OER’s multiplier effect.

**OER is a small force that is producing a correlating large effect, a multiplier effect.**

I tried to capture this effect with two images: an image of water and an image of a butterfly. Let’s go back to the water—and the ripple effect—where one small item, OER, can cause a spreading, pervasive, and sometimes unintentional effect of influence. But then I thought about this a bit more and I moved to the butterfly image and the butterfly effect, where one small change, OER, can lead to large-scale and unpredictable variations in the future state of the system.

Nicole Allen, director of open education at SPARC (the Scholarly Publishing and Academic Resources Coalition) speaks eloquently of the unintentional and unpredictable.

“Part of open is enabling the unexpected. It doesn’t mean you need to write your own textbook tomorrow, it means you can think open and how it relates back to your mission.”
I like the butterfly effect image more because of the variance in the adoption of OER and the variance in the system changes in the 38 colleges we are working with.

In either case, OER is a small force that is producing a correlating large effect, a multiplier effect.

Think about it. Your adoption of OER is spreading and touching not just on clear issues of student affordability, but on less obvious issues of access, completion, reducing time to degree, decreasing debt, advancing equity, rethinking pedagogy and course design, setting into motion institutional, state and federal policy, funding and systems change.

_There is no better time to take on this work and take it further than we ever envisioned than now. And, there is no sector better positioned and required to take it and lead it forward than community colleges._

David Leonhardt's recent _New York Times_ piece makes a compelling case for the why of this work calling out the "abysmal" college graduation rate for low-income students. For the poorest wealth group, college attendance has risen, but college graduation has not. So, even as the college attendance gap between the rich and poor has shrunk, the gap in the number of rich and poor college graduates has grown. The surge in poorer students going to college hasn't led to any meaningful change in the number of college graduates from poorer backgrounds. This is at a time when we know the economic and social mobility consequences of not completing a college degree, or at least some post-secondary education that leads to a credential, is increasing.

Supporting low-income students to completion requires a lot of changes in policy across supports for institutions serving the most low incomes students, changing transfer policy, financial aid policy, improving public benefits access, addressing tax and housing and mass transportation policies, etc.

Yet, back to the multiplier effect, addressing the cost of educational materials is one area where we can have immediate impact as leaders.

I speak to president after president about this effort and all can recite how much money the adoption of OER has saved each semester for students!

And, many community colleges, perhaps some of you here, are adding OERs to their College promise programs to further remove financial barriers to entering and completing college. As I mentioned earlier, _Forbes_ writer Hal Plotkin calls out the importance of the partnership between the College Promise Campaign and this OER work with ATD.
Increasing affordability is multiplier one.

ATD, OER and the Fundamentals

It is because of the potential of OER that ATD took on this OER effort. We saw the immediate connection between OER and affordability and the potential to decrease time to completion and even increase course success and overall completion. We also saw the power of OER to influence teaching and learning to give faculty newfound license over course design, among many things.

I went back to my notes from August 2015, when ATD was first considering competing to be the intermediary for this effort. We knew that ATD, because of the innovative nature of our colleges and their work in scaling student success solutions, that we could catalyze and build a lasting conversation and action agenda for OER connected to student success. We knew our efforts in incubating new ideas, disseminating new knowledge back to the field and designing supports for scaled solutions tied to organizational change would contribute to achieving the OER vision aspired for by Hewlett. ATD also knew that success in this work would require the deep engagement of faculty, and from experience in previous innovation efforts, we know faculty is the key to adoption.

We also see the integration of an OER strategy into the larger college student success strategy as a way to accelerate and leverage existing student success work. And, we know that success in taking on this type of change work requires strength in organizational fundamentals, the fundamentals many of our ATD colleges are familiar with, fundamentals that I like to say anchor the “ATD Way.”

If you look at the seven capacities, and you think about your OER work, especially at the stage it is in now, I am sure you can offer examples of how your OER efforts touch on these fundamentals. I will run through a few.

Leadership
colleges seeing the full benefits of OER have leaders, including their Boards, Presidents, administrative leaders, faculty leaders and student leaders, all leading forward the OER charge. We heard last year from San Jacinto College of the influence of the board in taking on OER.

Data and Technology
The OER work touches deeply on having strong instructional technology systems in place and on connections to the student system and student data to provide the analytics we need to study the effectiveness of our OER work. Santa Ana College involved its own research team in the collection of OER data. The team made the data
accessible to all faculty. During the first year of the grant, the team was able to see that their OER degree courses had higher student retention and success rates.

**Strategy and Planning**
We are seeing a few of our ATD colleges put this OER work at the heart of their student success agendas making a commitment to scale beyond one degree pathway. At Odessa College, all students who earn an associate’s degree will be able to complete the 42 hour degree core without paying any textbook costs.

**Policies and Processes**
OER is strategically built into policy of the West Hills Community College District’s strategic plan. The Board Policy and Administrative procedure 4042, encourage faculty to adopt OER and support faculty adoption of OER to improve student success and teaching effectiveness. The policy moved through shared governance and the West Hills Lemoore Academic Senate.

**Engagement and Communications**
Branding your OER degree pathways and engaging stakeholders is important. Bay College has focused on three populations: Students, faculty, and the broader college community. For students, they created a “Goosechase” scavenger hunt and held a “Free the Textbooks Rally.” At the rally, faculty champions were given Rockstar tee shirts and trophies. A professional videographer documented the event and interviewed faculty for materials to repurpose to build awareness of the OER program.

**Teaching and Learning and Equity**
I will explore in a deeper way in a moment.

*Strategically tying this work to your student success strategy and attending to building the fundamentals to scale and sustain it within your college is multiplier two.*

**OER and Equity**
About two years ago, ATD adopted a new equity statement, a statement that guides our work at ATD and that we use as a thought starter to guide the equity work on our campuses.

Importantly, our new statement turns the dial from a first decade of important specific work to address the equity gaps of low income students, students of color, and “at-promise” students to a second decade of addressing systemic, structural barriers—barriers in our colleges and in the ecosystem within which we sit—barriers that hold back further reduction of equity gaps. This is a consequential shift that will define the next generation of our student success work.

OER is a strategy, that when scaled, can address systemic and structural barriers.
I have shared this quote from Ta Neishi Coates’ in his book *Between the World and Me* before. It captures the opportunity OER presents for students to open up our classrooms to those who can fly is we free them from its current construct.

“The streets were not my only problem. If the streets shackled my right leg, the schools shackled my left.” He continues: “I was a curious boy, but the schools were not concerned with curiosity.” And later he points out, “I was made for the library, not the classroom. The classroom was a jail of other people’s interests. The library was open, unending, free.”

OER offers us another opportunity to address equity, an opportunity captured by a faculty member from Everett College, in Washington State, in a DREAM plenary panel. She said: “creating identify safe environments in our classrooms, environments where it is not necessary to defend one’s identity to anyone, is an essential building block of equity.”

In this OER effort, we have compelling examples of how OER can be a bridge toward equitable outcomes.

Bunker Hill Community College, in Boston, a 2014 Leah Meyer Austin Award winner, student success work is grounded in the knowledge that culturally relevant pedagogy and place based teaching and learning are keys to student achievement. Through an National Endowment of the Humanities grant-funded project, a critical mass of Bunker Hill faculty have begun to use place-based pedagogy that use the diverse, local communities of Boston as avenues for students to learn about themselves in their own communities, drawing on their owned lived experiences. Bunker Hill is leveraging the OER degree initiative to engage increasing numbers of faculty in the development of culturally relevant and place-based OERs.

Faculty at Borough of Manhattan Community College, New York, complained about the images of the incarcerated in traditional criminal justice textbooks. OER gave them an opportunity to adapt the images in their course materials to remove the implied association between criminality and skin color.

Pierce College’s strategic plan explicitly mentions using OER as a tool to support the college’s equity goals by encouraging faculty to use OERs to create learning that solicits the student voice.

**OER is an equity multiplier, multiplier three.**

**OER and Teaching and Learning**

ATD sees the next wave of student success work requiring colleges to build a culture of teaching excellence just as they have built cultures of evidence in the first wave of reform. Because of our work with you over these past two years, we also see the creation and use of OER as an essential piece of developing this culture of teaching excellence.
Adoption of OER can connect faculty in deeper ways to their disciplines. It brings librarians, co-curators of course content, back into the heart of important learning outcomes conversations.

Using open resources has the power to literally transform teaching and learning in ways that improve both student and faculty engagement. Using open resources in instruction can create the customized and personalized learning that has the promise to open up our classrooms to those students who so need to be freed from its current construct.

The teaching and learning promise of OER is captured by David Price in his book, *Open*. He writes:

"We’re becoming increasingly dissatisfied and consequentially disengaged from the way we learn in the formal space. ‘Open’ is shifting the focus of attention from how we should teach to the best ways to learn."

Many of you are rethinking the design of your developmental education approaches. The introduction of OER offers new ways to think about ensuring preparedness for college-level courses.

OER enables faculty to use a mix of learning resources that allow students to learn in ways—and at a time and place—that are best suited for their personal learning style.

*Teaching and Learning is the fourth multiplier.*

**OER and Influence Beyond**

While the impact on the students, faculty, and staff at our individual grantee colleges is important, another important aspect of this initiative’s impact is due to its size and scope. The OER Degree Initiative, along with other large-scale projects such as the work of BCcampus institutions in British Columbia and California’s ZTC Initiative, has helped significantly raise the awareness of OER, contributing to the launch of other new and notable OER projects:

- Based on the successful OER work of our CUNY & SUNY grantees, the Governor of NY provided each system with $4M to support the creation of OER courses. That project is nearing the end of its first year.
- Santa Ana College and West Hills College were awarded ZTC implementation grants, building on their institutions’ OER degree work
- The first Canadian OER degree, called a Z Cred, was launched last year at Kwantlen Polytechnic University in British Columbia. You hear about each of these projects during the Non-Grantee Plenary Session, Wednesday at 2:35 p.m.
- Last year in Ohio, the state awarded a consortium of universities and colleges an innovation grant to convert the top, high enrollment courses to
OER. Cohorts of faculty are working together to create these courses.

○ The University System of Maryland’s William E. Kirwan Center for Academic Innovation was awarded funds from the legislature to host a very successful OER Summit in December.

○ The recently passed federal budget includes a $5 million fund to spread OER and there are new requirements that if you receive grant funds to create new materials, all of them will be available with an open license. Sharon Leu, senior policy advisor says: “We are literally putting our money where our mouths are.”

According to SPARC’s recently published *OER State Policy Playbook*, there is some form of OER policy in place in 20 states. The playbook offers suggestions on good policy and a companion *OER State Legislative Guide* offers examples of state legislation. 

**Good policy:**

- Includes funding to jump start adoption
- Targets specific programs to move to OER
- Includes accountability metrics primarily for students. Many issue savings challenges
- Requires OER to be marked in course schedules
- Requires that OER be equally accessible to students with disabilities
- Respects academic freedom

The movement will be best served by legislation that is not too broad and not too prescriptive. We can help shape these parameters by sharing what we are learning here.

*The ability to mobilize influence of OER is multiplier five.*

**Challenges and Opportunities**

Even with the success of this effort—a sneak peek at data which will be shared with you next: in Fall 2017, this collaborative delivered 222 OER courses in 1,110 sections touching 26,534 students with 73 percent course completion rates, we have much more to do to enhance OERs multiplier effect.

*OER is still not mainstream.*

We learned that from national faculty surveys showing low faculty awareness of OER. We are not at a tipping point with faculty. We must find ways to help more faculty see themselves as part of a broader OER movement.

*OER adoption is a process that requires sustained professional development efforts.*

We learned from our SRI study that more than half of faculty in this OER effort is new to OER. Most faculty professional development efforts are boutique efforts designed to support the unique interests of individual faculty or groups of faculty or programming
moves from topic to topic. Colleges need structures to spread adoption and to create a cycle of going deeper into professional development in a way that connects to a broader teaching excellence agenda. A formal structure like a Teaching Center can take on large-scale strategic change that requires broad faculty engagement.

_OER is still not considered a strategic or core activity of the student success agenda of our colleges._

We learned from our SRI study that you have embraced three structures to advance this work---administrative led, grassroots led, and service unit led. No matter the structure, for OER to scale, it must be a core organizational strategic priority and it needs structures, funding and systems to support sustainability and continuous improvement.

_OER needs to be integrated into intake systems._

Colleges designing OER degrees must be focusing on communicating the availability of OER as they redesign their student intake systems, changing course notations in their enrollment management systems, integrating messaging in recruitment literature, and orientations, and working with their advisors to help students enter pathways with full degree OER opportunities.

_OER cannot be done in isolation._

As we build transfer pathways we should think about OER degrees that are shaped with transfer partners. Tidewater and ODU offer an example of this opportunity and challenge.

_OER sustainability is in its infancy._

Your plans, in development now, include essential components such as pricing, costing, and funding. We don’t yet know what we don’t know.

**In Closing**

Indeed, there is much at stake with this effort. And, we have much more to learn,

This work will continue to be uncomfortable.

David Price says this about the promise of open: “The opening of learning is transforming every aspect of our lives. It offers the promise of a more equal distribution of wealth, opportunity and power. It can close the gap between the rich and poor and it accelerates the speed at which we solve intractable problems.”

That speed is the OER multiplier effect, an effect, I believe, that is fueled not by us being comfortable, but by us being comfortable with being uncomfortable.