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**Massachusetts Department of Higher Education**

**Course Marking Implementation Guidelines**

***Attachment A***

**Developed by the Course Flagging Committee of the OER Advisory Council**

**Ceit DeVitto, Bunker Hill Community College**

**Timothy Dolan, Greenfield Community College**

**Millie Gonzalez, Framingham State University**

**Cindy Mack, Student, Massasoit Community College**

**Donna Maturi, Middlesex Community College**

**Donna Mellen, University of Massachusetts Lowell**

**Bernadette Sibuma, Mass. Bay Community College**

**Marilyn Billings, University of Massachusetts Amherst, Ex-Officio and Advisory Council Co-Chair**

**Robert Awkward, Staff, Mass. Department of Higher Education**

**June 8, 2021**

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**Course Marking Implementation Guidelines**

**Massachusetts Public Higher Education**

**Open Educational Resources (OER)**

The effort to create course marking of open educational resources – both free and low-cost - throughout public higher education is being pursued, in part, because the Massachusetts Board of Higher Education voted unanimously on October 22, 2019 (AAC 20-03), to adopt this recommendation and encourage its implementation. The Board vote noted “OER courses should be designated in the course management systems for all public higher education so that the use of OER may be encouraged by faculty and students, and tracked and reported” (Mass. DHE, 2019).

The term Open Educational Resources (OER) has very specific meaning. The Board of Higher Education adopted this definition of OER on October 22, 2019:

*Open Educational Resources (OER) are teaching, learning and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions[[1]](#footnote-1).*

**Overview**

Course marking is “the process of assigning specific, searchable attributes to courses” (Ainsworth, Allen, Dai, Elder, Finkbeiner, Freeman, Hare, Heige, Helregel, Hoover, Kirschner, Perrin, Ray, Raye, Reed, Schoppert, & Thompson, 2020).

The Higher Education Opportunity Act (HEOA) of 2008 requires publishers to disclose certain information about textbooks and supplemental materials to faculty members as they decide what books to require. Publishers must disclose: (1) the textbook’s price, in all its available formats (i.e., paperback or unbound), (2) the copyright dates of the textbook’s three previous editions, and (3) the substantial content revisions made between the book’s current and previous editions. Publishers that sell textbooks bundled with supplemental material must also make the items available separately. Finally, higher education institutions are required, to the maximum extent practicable, to list the prices and ISBN codes of the required and recommended textbooks for each course on their online course schedules used for preregistration and registration[[2]](#footnote-2). A logical extension of this federal requirement would be to designate OER courses in institutional course management systems that will serve the same purpose, which is to inform students of textbook costs before they enroll.

Therefore, it is imperative to develop a system that will identify which courses are OER to encourage students to enroll in these courses, to identify course type, i.e., those that are OER (i.e., free) versus those that are low-cost (i.e., cost $50 or less) versus traditional textbooks. It will also encourage faculty to select OER materials – if they believe it is the best alternative for students – to meet the demand of students for free and low-cost teaching and learning materials. A meta-study conducted by North Dakota State University suggests that there was no significant difference in educational outcomes between students who used traditional textbooks and OER textbooks (Clinton & Khan, 2019). That means that the use of OER materials has a comparable learning impact as do traditional materials. This challenges an existing canard that OER materials were easier and less challenging. However, they have an appreciable reduction in costs for students (Ashford, 2018; Marshall, Awkward, & Texiera, 2019; St. Amar, 2020). In fact, there are several studies (Colvard, Watson, & Park, 2018; Ashford, 2018; Griffiths, R., Mislevy, J., Wang, S., Shear, L., Ball, A., & Desrochers, D., 2020) that suggest that student learning improved in OER courses.

Finally, our ability to establish and implement key performance indicators to track, measure, and assess the cost, outcomes, usage, and perceptions of OER requires course marking in order to know what OER resources are being utilized in what classes/sections and to discern the cost savings and the impact on student learning, equity, and completion.

**Preamble**

The OER Advisory Council, through the leadership of the OER Course Flagging Committee, developed these Implementation Guidelines. Its purpose is to provide guidance to Massachusetts public institutions of higher education based on the experiences and best practices from the ten Massachusetts public institutions that have already developed course marking systems and from the Washington (State) Community and Technical Colleges System and the Community College System of New Hampshire, which have published similar guidelines. These are recommendations, not requirements. We recognize that each institution is unique and must develop, adopt and adapt this higher education practice based on its unique culture, faculty, students and resources.

Statewide implementation of course marking will be in alignment with national trends. Seven states (i.e., California, Colorado, Louisiana, Oregon, Texas, Virginia, and Washington) have mandated course marking. The Austin (TX) Community College System reported that course tagging saved students over $8.5 million since they started it in spring 2017. To date, there has been over 20,000 students attending OER sections (Daly, Mills, Sebastian, & Sebesta, 2020).

Course marking is an essential component in the widespread adoption of OER, which in turn has the capacity to:

* reduce the costs of course instructional materials (the third highest cost for students after tuition and fees and room and board)
* address issues of inequity
* increase affordability
* improve student learning
* ensure all students have access to learning materials on the first day of class
* improve student success (i.e., persistence and completion)

Designating a course as OER within a course marking system should be included among the other elements employed by public institutions of higher education to address equity, student success, and completion. Implementing and maintaining a course marking system will require an investment of time and resources for each institution, but the data suggests that the return on this investment, in terms of revenues from increased enrollments and improved retention, will be significant. Further, in two key measures of enrollment intensity, which is an indicator of student progress toward graduation, students in courses that used OER enrolled in significantly higher number of credits the next semester than students in courses with commercial textbooks (Fischer, Hilton, Robinson, & Wiley, 2015).

**OER Type Policies**

For all designation types, Instructional Materials are defined as:

* Textbooks, eBooks, websites, software programs, apps, courseware packages, access codes to homework sites

Instructional Materials do not include:

* Tools and supplies cost, such as lab coat, goggles, notebook paper, art materials, thumb drives, or calculators
* Auxiliary fees such as lab fee, technology fee, or eLearning fee
* Inclusive Access or First Day programs

The OER Advisory Council members have concerns with the rising costs of non-instructional materials and a desire to provide transparency and equity for students. The scope of this guide does not address this topic, and council members have recommended that institutions also consider providing transparency of those costs.

***OER/No Cost/Library Resources****: No textbook to purchase, no cost for students*

Type Description

The required instructional materials are provided online at no cost (i.e., free). An optional printed version and some supplementary course instructional materials may be available for purchase. This designation includes Open Educational Resources, No Cost, and Library Resources. Institutions may elect to separate the designation types to provide specificity to students. For this purposes of this guide, we have combined the types of no cost instructional materials.

Type Criteria

To be designated as an OER/No Cost/Library Resources course/section, a course/section should use the following as the primary, required instructional materials for the course:

* OER: OER are resources released either under an open license or in the public domain permitting their free use, repurposing, and sharing (the so-called 5R’s[[3]](#footnote-3)).
* No Cost: Instructional materials are provided to students at no cost. No cost instructional materials are generally funded by grants, institutional funding models, or a compilation of materials that are not OER.
* Library Resources: Unlimited simultaneous user resources from the campus library including ebooks, digital journal articles, streaming films, etc.

Qualified Cases Labeled as OER

* OER resources that are free, but are not adaptable (e.g., have a CC-ND component to the license).
* Use of adopted or adapted open textbooks or instructional materials regardless of the format, e.g., course/sections that use an optional printed version of open textbooks or instructional materials with a small printing and handling cost[[4]](#footnote-4).
* Use of faculty-developed textbook or instructional materials with an open license or public domain designation, if
  + Instructional materials are freely accessible by the students and students can keep them after the course is completed.
  + Faculty plan on releasing the instructional materials with an open license or public domain designation when ready.
* Use of open textbooks or instructional materials as required course materials. Before supplemental copyrighted materials with all rights reserved are used, faculty should consult with OER experts on their campus. Faculty members are encouraged to locate or create an OER replacement.
* Use of a combination of OER and the campus library resources as required course materials, if
  + OER provides the primary foundation of the required instructional materials.
  + Unlimited simultaneous user resources from the campus library are available to the students.

Insufficient Cases Labeled as OER Course/Sections

* Use of OER as a supplementary course/section instructional material while using a commercial textbook as the primary course/section instructional material.
* Use of library reserved text when a textbook purchase is required, unless the reserves provide unlimited-user resources.
* Use of OER with software or online sites that require the purchase of software or licenses permitting the use of materials, e.g., if a student has to purchase an access code to do homework or read primary course/section materials, the section should not be designated as OER. It may be marked as Low-Cost if the course/section fee for each student is $50 or less.
* Publisher content included in tuition or course/section fees such as online course/section materials provided through Inclusive Access Program or First Day program are **not to be marked** with the OER code.
* Third-party bookstore products such as BNC OER+ are not to be marked with the OER code unless the content is publicly available with clear terms of use that allow free public access. It may be marked as Low-Cost if the course/section fee for each student is $50 or less.
* Course/sections that traditionally do not require any course materials are not to be marked as an OER course such as aerobics, yoga, or sports dance class. These types of courses should be treated as Low Cost if the course/section fee for each student is $50 or less.

Note: If required material for a course/section cannot be evaluated using this OER marking criteria prior to registration, it should not be marked as an OER course.

***Low-Cost*** *($50 or less):*

Type Description

The required instructional materials cost $50 or less.

Type Criteria

To be designated as a Low-Cost course/section, the combined cost of the course/section instructional materials should be $50 or less. This marking is to designate those course/sections that use affordable instructional materials that do not conform to the OER/No Cost/Library Resources criteria.

This includes all required instructional materials (definition above).

The $50 (or less) threshold is based on the pre-tax retail price and is applied to all class sections regardless of the number of credits offered.

* The threshold is based on the price at the campus bookstore or charged by the publisher directly; whichever is lower.
* Prorating the book cost based on the number of credits or the number of sections used is not recommended. For example, a $100 textbook spanning two semesters is not to be prorated 50/50, thus it is not to be labeled as Low-Cost.

Consider the cost of new and also used, rented, and older editions of the required instructional materials.

* For used, rented, and older editions to be included in the Low-Cost designation,
  + Students should be able to acquire the instructional materials for $50 or less either from the college bookstore or the publisher directly, and
  + The college bookstore/the publisher should have sufficient stock for all enrollments. The faculty member should be advised to confirm this before assigning.
* Prices offered by other third-party vendors such as Amazon.com should not to be considered due to price fluctuation and uncertainty of stock availability.

A lecture course with an associated lab section should be coded together if lecture courses are integrated with lab sections (i.e., lecture and lab are simultaneously registered into a single course).

* A combined cost for the required instructional materials from lecture and lab should be $50 or less in order to be marked as Low-Cost. This excludes the lab fee and the cost for any supplies or equipment needed for the lab section.
* A lecture with lab may be coded separately only if they require separate registration with independent section numbers.

Examples of Courses Meeting the Low-Cost Threshold

* Use of an inexpensive commercial textbook costing $50 or less.
* Use of a course material bundle (e.g., textbook and homework website) costing $50 or less
* Use of a faculty-developed course package costing $50 or less

Examples of Course that Do Not Meet the Low-Cost Threshold

* Textbook costing $50 and online homework site costing $150.
* Textbook costing $100 but is used for two courses in a sequence.

Note: If instructional material required for a course cannot be evaluated using this OER marking criteria prior to registration, it should not be marked as an OER/No Cost/Library Resources or Low-Cost course.

**OER Recommended Practices for Course Marking Implementation**

Academic Leadership

The first step to establish course marking is to secure the approval and support of the Chief Academic Officer. Implementation of course marking will involve cross-functional resources, financial support, and faculty and student support. Thus, this effort must begin with academic leadership support as a means of addressing equity (a strategy to address educational access and affordability for minoritized students) and for increasing student success (i.e., affordability, improving academic performance, and increasing persistence and completion).

OER Stakeholder Implementation Committee

The next step is to create an implementation committee comprised of key stakeholders across the institution including an associate/assistant provost or a dean, registrar, librarian, faculty member, faculty union leadership member, online learning staff, IT staff, and a student.

The role of gathering stakeholders is critical. First, higher education is a collegial culture where people work together to address challenges. Accordingly, this is an essential component to ensure success of this project. Second, sustainable change only occurs when those affected are involved upfront and are responsible for the outcome. Third, the experience from Massachusetts public institutions who have implemented course marking is that a committee of stakeholders is essential for success.

A four-year institution described the role of stakeholders as follows: “Our efforts were a combination; students requested assistance with rising textbook costs, faculty had a desire to provide equity – access for all, staff understood the importance of this topic, and administration provided funding and support to move this forward.”

This initiative is one that requires “a whole village,” in the words of the oft-repeated African proverb. It affects all and must be designed and implemented by all to work effectively; to meet the needs of students, faculty, and the registrar; and to be sustainable.

OER Course Marking Process

Course marking is currently a manual, time-intensive process at all Massachusetts community colleges and universities. Best practice would be to have a dedicated staff member to manage and oversee an automated process that notifies and receives information from faculty, confirm with the bookstore, continuously monitor course/section/faculty assignments, and upload the information into the registration system.

If an automated system cannot be acquired, the next best practice is to have adequately designated staff to manually perform these roles. Currently, the process is uniformly inconsistent and incredibly time-intensive across the ten institutions that have implemented course marking to-date. Often, the person doing this role does so in addition to their primary responsibilities. If the person were to leave, course marking would stop because it has not been institutionalized.

Another major requirement of the course marking process is the evaluation of whether or not the teaching and learning resources selected by faculty are OER/Free, Low-Cost, or traditional, which must continuously be done to ensure integrity in the course marking system. However, this manual process is also cumbersome given changes in course, sections, faculty assignments, and faculty decision making as to their choice of teaching and learning resources. Thus, this guideline is provided to clearly define why OER is important, what is and what is not OER or Low-Cost resources, and how best to implement course marking so that it works and is sustainable given its value in contributing to student persistence and academic success.

**Closing**

The Course Marking Implementation Guidelines will provide public institutions of higher education a roadmap based on best practices for how to implement course marking. These guidelines combined with the OER Key Performance Indicators will provide a method to assess the impact of course marking at our public institutions.

Implementing course marking will make it easier for students to make informed decisions about whether or not to enroll in courses using free or low-cost instructional materials. Students will have the opportunity to lower their costs and to increase their student success. In addition, the adoption of OER Key Performance Indicators will enable each institution and the DHE to better assess the impact of the time, money and effort placed into advancing the use of OER. As a result, we can more cost-effectively employ our resources in order to achieve the maximum return on our collective efforts and the financial investment in this initiative.

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**Appendices**

**Appendix A**

**Massachusetts Public Higher Education**

**Course Marking Survey**

**OER Course Flagging Committee**

**Overview**

In the *OER Final Report & Recommendations* (2019), produced by the OER Working Group and endorsed by the Board of Higher Education, one of the recommendations was to implement course marking across public higher education.

Course marking is “the process of assigning specific, searchable attributes to courses” (Ainsworth, Allen, Dai, Elder, Finkbeiner, Freeman, Hare, Helge, Helregel, Hoover, Kirschner, Perrin, Ray, Raye, Reed, Schoppert, & Thompson, 2020)

Students have informed us that they are far more likely to take OER courses when they know they are being offered through course marking. That also means that more faculty members were encouraged to develop their courses using OER to meet the desire of students to lower the costs of textbooks. Of course, there are also faculty members who feel they will be penalized if they do not choose to select OER and that it will be a violation of their academic freedom. All of these were among the issues for which we needed to obtain actual versus anecdotal information.

The survey was developed and administered for the purpose of learning the status of course marking among public institutions of higher education in Massachusetts. Among those institutions that had implemented course marking, we sought to identify shared characteristics, obstacles to implementation, and to create a set of recommendations that will be instructive for other public institutions seeking to establish similar systems of designation on their campuses.

**Executive Summary**

One hundred percent of the Commonwealth’s public higher education institutions participated in the survey. An analysis of the survey results is provided below. The results highlight that:

1. **The definition of OER among MA public colleges and universities is still evolving**. Of the institutions currently designating courses as OER, many do not define open education materials as *solely* textbooks, and many do not identify OER courses as “free” of cost to students. Instead, definitions of OER can also include ancillary materials and can cost up to $50 in materials. As a result, campuses vary in the way that OER courses are “flagged” for students. **There is no shared OER marker across MA institutions of public higher education.**
2. **Community Colleges lead the way in MA.** The colleges that have successfully created course flagging schemes in Massachusetts are our community colleges. Their efforts highlight the power of bringing together campus partners to identify an OER definition that is homegrown, working with the campus student information system, and acknowledging the importance of on-going campus collaboration to keep the designation system working.
3. **Unions can be partners in successful OER course marking systems.** Anecdotal concerns about collective bargaining as an obstacle to successful adoption of OER marking systems did not arise as a significant barrier in the survey outcomes. Instead, results highlight the importance of recognizing the way that OER achieves student-centered outcomes on our campuses.
4. **Sustaining OER flagging initiatives is complex work – success requires thinking beyond adoption.** Every respondent that has a designation system, those that have tried and failed, and those that are trying to implement, universally describe the complexity of managing the details related to this type of program.

Based on these results we recommend that:

1. We should develop an implementation blueprint that public institutions of higher education will be able to use to implement course flagging using the knowledge gained from the institutions that have already implemented it.
2. The OER Working Group and the Board of Higher Education adopted the UNESCO definition of open educational resources. That is, our focus is on increasing the adoption, adaptation, and creation of free OER[[5]](#footnote-5) resources. However, in terms of tracking activities, there are at least four streams of open education activities that all help to reduce costs of textbooks and ancillaries for students. Without creating an overly burdensome reporting system, it may be necessary to track these as:

* Free and OER: No cost and the 5Rs apply
* Free and not OER: No cost, but the resource is not adaptable or accessible
* LowCost and OER: Low cost (i.e. , $40) and the 5Rs apply
* LowCost and not OER: Low cost, but the resource is not adaptable or accessible

1. Define low cost as equal to or less than $40 statewide. Reducing the average cost of textbooks from $117[[6]](#footnote-6) to $40 or less provides significant savings to students. In addition, the cost is often for ancillaries that are an important teaching and learning tool. While our focus remains on OER as free, we recognize that low cost (i.e., < $40) is a useful means to the same end[[7]](#footnote-7). To be clear, low cost does not include “inclusive access.” Although inclusive access does reduce student costs compared to traditional textbooks, it is still much higher than the low cost options, which are < $40, and free resources of which there are an abundance of both. In addition, allowing for low cost options provides an incentive to faculty to adopt the existing low cost alternatives that advance the cause of lowering student textbook and ancillary expense, which faculty members may not have the time to create.
2. Establish NoCost and LowCost as common statewide designations.
3. Encourage institutions that have not currently implemented course flagging to create a committee of key stakeholders including local faculty union leadership in order to collaboratively implement this student-centered service.

**Survey Methodology**

The Qualtrics survey was designed by the OER Course Flagging Committee**[[8]](#footnote-8)** to be delivered to and answered by the members of the OER Advisory Council at the 29 higher education public institutions. The 17-question survey was intended to be completed in 5-10 minutes. The actual results show that time to complete ranged from one to 18 minutes or 6.3 minutes on average.

During June and July 2020, survey results were received and compiled from 100% of institutions. The OER Course Flagging Committee generated data tables and summary data for review, analysis, and discussion in order to develop recommendations for action for the OER Advisory Council.

**Summary of Survey Results**

There are ten institutions that have implemented course marking including: Bunker Hill Community College, Holyoke Community College, Massasoit Community College, Mass. Bay Community College, Mt. Wachusett Community College, North Shore Community College, Northern Essex Community College, Roxbury Community College, Springfield Technical Community College, and University of Massachusetts Lowell.

Fifty percent of institutions defined OER as open textbooks **and** ancillaries, 36% defined them as open textbooks or ancillaries, and 14% defined them as open textbooks only.

Although the *OER Final Report & Recommendations* recommended that the DHE focus on free resources, 39% of the institutions defined OER as free/no cost, 36% defined OER as low cost, and 25% did not define OER at all.

Since over a third of the institutions use low cost as their definition of OER, that led to understanding what they meant by low cost. Fifty-four percent did not define low cost, 12% defined low cost as less than $50, and 34% of institutions defined low cost as less than $40.

Given anecdotal information, we were pleased to learn that 62% of the institutions stated that collective bargaining had not been an impediment to their ability to implement course marking. That result may be added to 7% who said they had collective bargaining issues but were able to resolve them locally. Thus, 69% (n = 20) of the institutions did not have or were able to overcome collective bargaining issues as a barrier to successful implementation. As to the 31% (n = 9) who did have collective bargaining issues with which they were or will have to address, the following were some of the commentaries:

* “We must be cognizant of faculty sensitivity to administrative interference in course materials selection.”
* “There are concerns over stipends for delivering material.”
* Although the “union president has not taken this issue to their membership but has consistently blocked any administration efforts.”
* “Administration/management has not initiated a conversation with the union.”

There was also a suggestion offered as to how to address these potential barriers to success:

* The union has formed a working group tasked with considering OER on campus (we feel this is in positive support of such initiatives).”

Another important aspect was to learn who were the key stakeholders involved in decision-making and execution of OER initiatives. The most prevalent were campus [senior] administration, faculty, students, information technology, library, and academic deans who represented 89% of the identified stakeholders. As previously noted, 66% (n = 19) of the institutions did not have any system of course marking and only 34% (n = 10) did.

Since 66% of the institutions did not have any course marking system in place, it was important to understand why that was the case. The following were the most prevalent responses:

* OER is not there yet (30%)
* Process has not yet been proposed (23%)
* No clear definition of OER (10%)
* In process, but not yet solidified (10%)

For those institutions who designate OER courses, there was no commonality among them as to the designation. They included No Cost/Low Cost, NOLO, OER, OERN (Zero materials cost) and OERL (Materials cost < $40), and no cost or low cost class materials.

As to who was responsible for curating the OER designation process, the responses were extremely varied. The most prevalent (65%) responses were:

* Other (29%)[[9]](#footnote-9)
* Academic Dean (18%)
* Registrar’s Office (18%)

Overwhelming, faculty governance was not involved (70%) in establishing and/or maintaining the course flagging process.

We needed to discern what resources have been committed at the institutions who had implemented course marking to successfully implement this initiative. The results were mixed: 50% had added the task to the scope of an existing employee, 40% had not hired any new resources suggesting that they had also added this role to an existing employee, and 10% had hired a full-time employee for this role.

Given the answer to the previous response, the overwhelming feedback we received (89%) regarding how challenging it is to maintain and update the OER designations each semester/term is not surprising. The following are selected comments received:

* The OER designation is at the instructor level. However, faculty do not always teach the same CRN/section each term. Thus, the information must constantly be verified.
* Faculty are [constantly] leaving campus and changing resources.
* It requires constant monitoring to schedule and follow changing faculty and course materials.
* Faculty often get pulled from a course at the last minute and a new faculty member substituted who may or may not use OER.
* It is manual and time consuming (several stated this).
* We are having problems getting our OER committee moving, especially during COVID
* Unless the union issues can be solved at the statewide level via statute, we are not hopeful we will be able to move this initiative forward

**References**

Ainsworth, B., Allen, N., Dai, J., Elder, A., Finkbeiner, N., Freeman, A., Hare, S., Helge, K., Helregel, N., Hoover, J., Kirschner, J., Perrin, J., Ray, J., Raye, J., Reed, M., Schoppert, J., & Thompson, L. (2020). *Marking open and affordable courses: Best practices and case studies*. Licensed under Creative Commons Attribution 4.0 International License, except where otherwise noted.

OER Working Group (2019).*The OER final report & recommendations*. Boston: Mass. Massachusetts Department of Higher Education.

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**Appendix B**

Course Flagging Case Studies Interview Themes

History

The interviewees responded that course flagging has been in effect at their institution for five years or less at the time of this report. The earliest adopters include North Shore, Holyoke, Northern Essex, Roxbury, Springfield Tech, and Mount Wachusett Community Colleges, which report having started course flagging around 2016-2017. Bunker Hill and Massasoit began course flagging efforts in the past two years (approximately 2018). UMass Lowell and MassBay CC started in 2019.

Goals

Many institutions started course flagging to increase transparency and awareness of textbook costs, so that students and faculty could be informed of textbook costs on campus and the alternatives that OER texts provide. In a few instances, institutions themselves started flagging as a way to gauge OER use, with the cost-savings being used as a “affordable cost” marketing campaign.

Funding

Funding plays a significant role in maintaining OER efforts on campus. On the faculty side, institutions have provided grants or stipends to encourage faculty to use OER in their course design and delivery. Without such funds, one institution noted a decline in OER use. On the administrative side, funding to support one person taking on the OER coordination role was emphasized in a few institutions as imperative to sustainability.

Stakeholders

Institutions mentioned administrators most often, with faculty and library staff nearly as often as the key stakeholders involved in advocating for the program. In a few instances, online learning and special committees/task forces were also instrumental in getting efforts off the ground. While grassroots efforts were mentioned, having administrative support (such as provosts) and/or champions were key for some colleges to start and continue. In a few institutions, instructional designers or online learning staff that advocate for OER have been handling the curation efforts semester to semester. One suggestion was to create a position for a faculty to chair a committee in order to sustain the efforts.

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Figure 1. Word cloud of responses to Stakeholder question.

Process

To tag a course is a manual, labor-intensive process in all of the community colleges and university surveyed (HCC, UMass Lowell, Bunker Hill, Massasoit, STCC, Mount Wachusett, North Shore, Northern Essex, and Mass Bay.) Most have professional staff and not administrative staff to tag the courses. An “ideal” process would be to have a dedicated staff member (admin) to manage an automated process that would notify or receive information from faculty, check in with the bookstore, continuously monitor course and section changes, and somehow get the information into a registration system (preferably Banner). The reality is that the process is uniformly inconsistent and incredibly time intensive in all of these institutions. Not all of the colleges tag their courses in Banner (a best practice). Some attach a note in systems other than Banner. Most have the Registrar involved with of few of their staff doing the tagging. Several institutions have staff from other departments do this work on behalf of the Registrar. Because of the willingness and dedication of staff to support OER at their campuses, a dedicated core try to make this process work. Directors and Librarians do this manual labor of tagging courses and monitoring course changes on top of their other duties. All faced mostly tepid support from the Administration (no extra funding, or extra staff to support this effort).

These institutions define OER as either low cost (under $40) or zero cost. For the most part, staff solicit faculty to provide information about their courses (through Google forms, or a formal form). In a few of these two institutions, faculty self-identify as using OER in their courses (through a form, through Interview Exchange, through an email to VP/Dean). There are issues with faculty informing the staff (Instructional designers, IT folks, librarians, coordinators) that they are using OER in their courses. Some faculty just do not provide the information initially or when there is a change. Staff do the labor-intensive process of checking with faculty to confirm with them or of manually looking up the information in online course listings. Because of frequent course and section changes, staff constantly monitor the list of courses to determine if the courses use OER. If the institution uses Banner, they assign the course an attribute - low or no cost. Some institutions formed an OER council that was involved in determining how the process came about. Only in one institution, library manages the manual process and lists OER courses on their webpage.

All identify the manual process as a major hurdle. They wish to automate it at least in some areas of the process. A number of departments are involved to make this process work – staff who own this process (from Instructional Technology, IT or Library), Student Records/Registrar, and Academic Affairs. The bulk of the work fall on the staff responsible for OER. Course and section changes force staff to monitor constantly and take away time from other responsibilities. Some expressed lack of funding resources or modest funding as a hurdle.

Surprisingly, few of the institutions expressed that they did not run into any union issues with the course tagging process; not seen as mandate and other courses (like honors) have course attributes as well.

In summary, professional staff are supporting OER because they are committed to providing free or low cost textbooks to students, but the process is not easy to support. It is incredibly time-consuming, manual and takes away from their other responsibilities.

**Appendix C**

**M E M O R A N D U M**

TO: OER Course Flagging Committee

FR: Bob Awkward

CC: P. Marshall

RE: **OER Course Marking Implementation Guideline Campus Feedback**

DATE: May 25, 2021

This memorandum is to provide you an opportunity to read and comment on the feedback we received from the campuses. Commissioner Santiago sent out his first request on April 7th and a follow-up request on April 26th (the original due date was April 21st) to all presidents of public higher education institutions. We received feedback from Bristol Community College, Fitchburg State University, Salem State University, Springfield Technical Community College, University of Massachusetts Lowell, and Westfield State University, The feedback we received was the result of the second request. The feedback is summarized as follows:

* All five of the institutions fully supported the DHE’s efforts to advance and expand the use of OER and believe the Key Performance Indicators could and should be implemented.
  + “100% support [for] course markings.”
  + “...fully support OER [course markings and key performance indicators] and believe they could be implemented.”
  + “Supports the DHE’s goal to advance the adoption of OER.” “The KPIs are important indicators to measure as a starting point.”
  + “The...Guide is a very useful document” and “The KPIs suggested are appropriate.”
  + “This is a valuable and useful guide. And the KPIs lay a good foundation.”
  + “recommends moving this important agenda forward... in full support of the OER Course Marking Implementation Guide and Key Performance Indicators...”
* Two of the institutions commented on the quality of the Implementation Guide.
  + “We appreciate the work of the Course Flagging Committee and the OER Advisory Council in preparing a well-researched and practical OER Course Marking Implementation Guide.”
  + “The authors are to be commended for their work, on which I have no comment to offer, save ”well done!””
* Two suggested some additional metrics to consider:
  + The number of full-time and part-time faculty using OER
  + Look at OER use by program, i.e., what percentage of program texts are being offered as OER
  + Track the impact of OER courses on retention rates. That is, did full-time, first-year, first-time students who took OER curses the first year return the second year.
* Two commented that implementation at their campus will:
  + “require engagement with and approval by governance bodies.” However, the university would fully support this effort.
  + “take significant time and staffing to institute and maintain this practice.”
* One sought a question of clarification as to how should they calculate costs savings. That is, should it be the difference between the OER/Low-Cost learning material value and the average textbook cost or actual cost? Where is that defined? (Note: we did not define how to calculate any of the KPIs. We were seeking feedback as to whether these were the right measures.)
* One commented that there may be pushback by MCCC (the community college faculty union) and that they hoped the Advisory Council would help to respond to that since many are also MCCC members.
* One commented, “OER will require the input of all stakeholders...” as we noted in the report.

**Action Required of the Committee**

Based on the very positive feedback, there are only a few items that require a response from the Committee. The areas that you need to consider and respond to are, in my view:

*Should we add these suggested metrics to the requirement for all institutions? Are these useful and can institutions get them done?*

* The number of full-time and part-time faculty using OER
* Look at OER use by program, i.e., what percentage of program texts are being offered as OER
* Track the impact of OER courses on retention rates. That is, did full-time, first-year, first-time students who took OER curses the first year return the second year.

*How specifically do we suggest the KPIs are collected so that they will be standardized across the Commonwealth?*

**Closing**

Pat Marshall and I will be presenting the Implementation Guide and the Key Performance Indicators to the Academic Affairs Committee (AAC) on June 15th. The material to be sent to the AAC must be ready to go June 8th. Therefore, it is probably best and more effective if we virtually meet and resolve these issues versus doing it by email. I will send out a Doodle Poll for Tuesday and Wednesday, June 2 and 3 for a one-hour meeting. We should be able to resolve this in that timeframe.

1. Open Educational Resources. Retrieved June 18, 2019, from United Nations Educational, Scientific, and Cultural Organization Web site: <https://en.unesco.org/themes/building-knowledge-societies/oer>. [↑](#footnote-ref-1)
2. [www.cga.ct.gov](http://www.cga.ct.gov) [↑](#footnote-ref-2)
3. Wiley, D. (n.d.). Defining the “open” in open content and open educational resources. Retrieved from http://opencontent.org/definition/. [↑](#footnote-ref-3)
4. These fees should be on a cost-recovery basis, i.e., if a course/section requires an OpenStax textbook in print and the bookstore marks it up 500%, it should no longer be considered OER. [↑](#footnote-ref-4)
5. OER meaning that the resources are subject to the 5Rs definition of retain, reuse, revise, remix, and redistribute. This definition excludes tools and supplies, auxiliary fees, and small copying/printing costs. [↑](#footnote-ref-5)
6. SPARC (2018). [↑](#footnote-ref-6)
7. This does not include so-called inclusive access arrangements provided by publishers, which are typically $100 are greater. [↑](#footnote-ref-7)
8. The members of the OER Course Flagging Committee include Tim Dolan, Greenfield Community College; Millie Gonzalez, Framingham State University; Danielle Leek, Moderator, Bunker Hill Community College; Donna Maturi, Middlesex Community College; Donna Mellen, Scribe, UMass Lowell; Bernadette Sibuma, Mass. Bay Community College; and McKenzie Ward, Student, Framingham State University. [↑](#footnote-ref-8)
9. Other included instructional designer, teaching & learning center, professional staff, human resources and office of online learning. [↑](#footnote-ref-9)