

Texas Statewide OER Summit | Table Notes

Link to shared document in Google Drive:

https://docs.google.com/document/d/1t8BGiSJUnCGjaVwDp8go68Mfil-UHN-W-Tzmvz_JR4w/edit?usp=sharing

Strategic Planning Session Overview

Link to slides: <https://docs.google.com/presentation/d/1YdNOghP8jC2PWNxljOTpa-m1j1MYzEXybuvoLJ60DCY/edit?usp=sharing>

1. Discussion I | SWOT Analysis (1 hour) pgs 2-10
 - SWOT: strengths, weaknesses, opportunities, threats
 - 30 minutes each, Institutional and Statewide SWOT
 - Statewide Opportunities & Threats = 8 Themes
2. Discussion II | Breakout Discussion: Top 8 Themes and Patterns (1.25 hours) pgs 11-20
 - Top 8 Themes:
 1. Legislative environment
 2. Funding and sustainability
 3. Size and diversity of state
 4. Standardization vs. academic freedom
 5. Balancing commercial and community-based solutions
 6. Strong history of library collaboration
 7. Strong backbone organizations
 8. Texas individualism and exceptionalism
 - Top four themes tallied
3. Discussion III | Breakout Discussion: Creating Goal Statements (2 hours) pgs 20-24
 - Top 4 Themes:
 1. Funding and sustainability
 2. Standardization vs. academic freedom
 3. Strong history of library collaboration
 4. Legislative environment
 - Narrowed to Top 3 Themes:
 1. Funding and sustainability
 2. Standardization vs. academic freedom
 3. Strong history of library collaboration
4. Discussion IV | Synthesis: Strategies for Next Steps (1 hour) pgs 24-25
 - *Present State* > Bridge the Gap: What could be done in the next 6 months to get closer/achieve the desired future state? > *Desired Future State*

Session 1 | SWOT Analysis

Table #1 SWOT Analysis

Institutional –STRENGTHS

- Administrative support – chancellor, VP, Provost
- Branding – ALAMO OPEN
- Liaison Power – relationships with faculty
- Each department faculty buy-in for the pro- OA -open movement
- Student Awareness strong beginnings
- Organizational structure Alamo aligned with Student Success initiative
- Organizational structure in Libraries

Institutional WEAKNESSES

- One place ownership...need to span larger than one department/agency
- Student Success, Distance Learning, IDT, Librarian, Provost, student Govnt. Financial aid, registrar, bookstore
- You're not the boss of me

Institutional OPPORTUNITIES

- Student voices - Student Government
- Cross Collaborations – across departments
- Community Table - Student Success, Academic Chairs, Deans, Distance Learning, IDT, Librarian, Provost, student Govnt. Financial aid, registrar, bookstore, OIT (SIS and LMS),
- It's the economy stupid -The realities of going to school in today's time. The challenges. Sarah Goldbrick-Raab

Institutional THREATS

- Is there enough content in my area?
- Is the Quality there?
- Standards and (mis)Mgmt
- Don't drop the baby – Nurture throughout the lifecycle
- Definition
- Publishers – inclusive access

State STRENGTHS

- Agencies
- Backing from THECB
- TexShare
- TLA
- Legislation
- We have SB810 – internal pressure I want my course to make – add OER

OER Summit: Table Notes

- Growing awareness across the entirety of the state
- Geo location 2 year and 4 year – overlap in same cities

State WEAKNESSES

- See strengths
- Seen as a competition
- Lack of a unified leadership
- Interest but not the awareness – we have their attention /people are listening
- Culture of rugged individualism. We can take care of our dept. or our school –
- Pride leads to silos
- Show me the money! –compensation structure for faculty T&P, release time, royalties
- Turfy - step on toes...Academic Freedom, etc. Unclear the role of the community members at the table?

State OPPORTUNITIES

- Opportunity to collaborate across institutions- Geo location 2 year and 4 year
- Leverage strengths of roles. Could define what is the role of the community members at the table.
- Reverse engineering. UPenn. At state level we guarantee 2 years from now we make it open.
- Collaborate the buy-in Discounts
- Development. To build upon other oer
- Window at the THECB
- Federated search. IT Help!– take everything that people have created in TX and help us get at it.
- Standardize Metadata, HTML, HTML5

State THREATS

- Technologies
- Tech issues – areas underserved by broadband infrastructure, devices and equipment Admin (mis)guidance Mandates. Do it my way or the HWY! - the wrong admin could be a detriment to the movement
- Money – Loss of royalties or if OER textbook won't count to go up for FULL.
- Publisher contracts – possible to have open and pub print and sell at the same time
- I want my class to make –
- Thinking is all or nothing.

SUSTAINABILITY - Who host content –
Inclusive access – the illusion

Table #2 SWOT Analysis

Institutional - Strengths:

- Administration leadership

- SGA-Student input
- Academic freedom

Weaknesses:

- Perception of quality of OER materials
- Faculty lack of time
- Lack of infrastructure
- Lack of structure/coordination

Opportunities:

- OER stipend
- Faculty development
- Debt ratio for the institution

Threats:

- Publishers /packaging
- Faculty
- Legislative mandates
- Change in leadership

Statewide level

Strengths

- Population growth
- State thinking/considering the issue of student debt
- State discussing how to alleviate student financial burden

Weaknesses

- High number of institutions in TX-difficult to find a platform that works for all
- Size of the State of TX
- Large system

Opportunities

- Provide access to isolated regions
- Open Stax in our state
- Form partnerships

Threats

- Politics
- Legislative environment
- Many school systems working independently/not coordinating
- Publishers lobbying

Top 8 themes:

- Legislative environment: Very relevant for all State funded institutions
- Funding & sustainability: Very relevant; sources of funds (i.e. private donor, state)
- Size and diversity: Size somewhat relevant; diversity (relevant)
- Standardization vs. academic freedom: Both very relevant; possibly offer a larger pool of OER where faculty could select from
- Commercial and community based solutions: somewhat relevant
- Library collaboration: Very relevant ; If there is trust between faculty and library that could be an advantage to OER initiatives
- Strong backbone organization: very relevant; through the system of schools

- Individualism and exceptionalism: somewhat relevant

Top 4 themes

1. Legislative environment
2. Funding and sustainability
3. Standardization vs academic freedom
4. Strong backbone organization

Table #3 ([see sticky notes](#))

Table #4 ([see sticky notes](#))

Table #5 SWOT Analysis

(4-Year Public / Health & Medical)

Institutional - Strengths

- Cost
- Community Building (SGA, student orgs.)
- Administrative Support
- Student Retention, Support, Success, Impact
- Continuous Access & Accessibility (ADA)
- Faculty Collaboration & Partnership
- Flexibility
- Potential for Open Pedagogy
- Marketability to Students
- Adaptability
- Ties to Advising
- Positive Perception

Institutional – Weaknesses

- Quality Control
- Culture Change
- Institutional Capital (lack of)
- Fear of Losing Academic Freedom
- Lack of Incentive Structure
- Faculty Pushback (what are the benefits for faculty)
- Lack of Awareness of OER
- Threat to Publisher Relationships
- Stigma (free = bad)
- Support of Academic Department

Institutional - Opportunities

- Stronger faculty/librarian partnerships
- Option for greater faculty scholarship
- Incorporating student voice into institutional planning & decision-making
- Increase in student enrollment
- Increase in student success (completion & retention)

OER Summit: Table Notes

- Cultural shift and expectation for open access
- Collaboration with other institutions & organizations
- Positive Perception / Marketability
- Responsive to an existing issue (textbook cost)
- Relationship building within the institution (advising/SGS/bookstore/faculty/librarians)

Institutional - Threats

- Cost = quality perception
- OER Textbooks do not help with tenure
- Appropriation by For-Profit Industry
- Faculty Morale
- Private Industry - Students buying books on the web
- Copyright Infringement
- Inclusive Access
- Lack of Support from Administration
- Confusion concerning OER Partnerships - Value?
- Institutional Costs

Statewide - Strengths

- Legislative Support (SB810 / 30x60)
- State Funding
- Economic Development
- Student Success & Retention Initiatives
- Texas Digital Library & TSLAC Collaboration
- Digital Infrastructure
- Cumulative efforts of institutions
- Adding OER into existing repositories
- Navigating Legal Issues
- Higher-Education Affordability

Statewide - Weaknesses

- One size does not necessarily fit all (Texas is big and diverse)
- THECB not always responsive
- Bureaucracy
- Resistance to State Mandates
- Loss of Revenue (Publishers)
- Climate of Higher-Education and Legislation (Cuts to Funding)
- Budget Cuts (Course Creation / Need for OER textbooks / Who teaches sections [adjuncts])
- Independence

Statewide - Opportunities

- Learn from other states (learn from best practice)
- Interest & Support from State Library Entities

OER Summit: Table Notes

- State-to-State Collaboration
- Equal Access to Educational Materials For All
- Mapping & Sharing of Resources for Core Curriculum
- State & Federal Grant Opportunities
- Ability to build a Statewide Repository
- Resource for New Educators

Statewide - Threats

- Funding
- Sustainability
- Ideology (Faculty Independence / Institutional Uniqueness)
- Lack of Faculty Cooperation & Collaboration
- Unfunded Mandate
- Accountability Measures
- Difficulty of Curriculum Alignment

Table #6 ([see sticky notes](#))

Table #7 SWOT Analysis

(2-Year Academics)

Institutional - Strengths

- Faculty initiatives
- Recognition of student needs;
- Administrative/institution/policy support
- Partnering with the library,
- External grant funding

Institutional - Weaknesses

- Lack of knowledge
- Lack of institutional coordinated approach
- Lack of faculty incentives
- Lack of capacity - not enough FT faculty/librarians
- Technology challenges
- Student awareness

Institutional - Opportunities

- Partnerships both internal and external
- Personalized learning - adapted to particular class
- Support and address equity
- Support retention/persistence and success/graduation
- Affordable learning
- Proprietary technology platforms

Institutional - Threats

- Competition of textbook publishers

OER Summit: Table Notes

- Sustainability (time/capacity for maintenance)
- Perceived threat to academic freedom
- Funding
- Lack of institutional support
- Perceived lack of academic rigor

Statewide - Strengths

- Statewide knowledge/passion
- History of cooperation
- Legislative interest and support
- Everything is bigger in Texas (strength in numbers)
- State support groups and interagency cooperation
- Institutional models that can be scaled up

Statewide - Weaknesses

- Disjointed efforts
- Size of the state
- Limited in looking outside of TX
- Limited use of technology to bridge distance
- Autonomy! Competitiveness
- Statewide ownership?
- Focus on academic and career workforce
- Lack of interest outside of our field

Statewide - Opportunities

- Scaling up existing models
- Partnerships
- Size of state - LARGE opportunity
- International partnerships
- Model existing state programs

Statewide - Threats

- Big publisher lobbies
- Legislative Action/Inaction
- Funding restrictions/structure
- Quality control
- Transferability of content/courses
- Ownership
- Location and/or size

Table #8 SWOT Analysis

Strengths

- TAB grant requires OER
- Association with open stacks

OER Summit: Table Notes

- New library publishing group
- Connection to open access movement
- Presence of campus committee
- Interest from faculty and students
- Survey on textbook affordability
- Growing awareness and support for first generation students
- Comfort with online learning
- Seen as social justice imperative

WEAKNESS

- FUNDING
- Sustainability
- Getting and maintaining engagement
- Lack of full support of textbook packages
- Campus awareness knowledge of Oer
- Time to required To implement and workload
- Perception that its not needed at wealthier institutions
- Lack of incentives for faculty
- Not recognized in promotion and tenure

Institutional OPPORTUNITIES

- TAB grant
- Initiatives that require A and M
- University strategic plan connections
- Student success retention completion
- Course retention rates increase
- Federal grant generated interest on campus
- More opportunity for collaboration between schools
- New houston OER Consortium
- OER as good PR, recruitment tool
- Attract donors

THREATS

- Barnes and Nobles LoudCloud platform
- Publishers have more resources
- Competing concerns
- How to sustain at institution level
- Sustainable funding

Table #9 ([see sticky notes](#))

Table #10 ([see sticky notes](#))

Table #11 SWOT Analysis

Institutional Strengths

OER Summit: Table Notes

- Ready to change and be bold (PVAM admin)
- Student & student government engagement
- Institution involved in student success
- Inclusive (stakeholder) taskforce (Angelo State)
- There's interest in OER
- Communication outlets to faculty

Institutional Weaknesses

- Lack of funding
- Lack of incentives
- True understanding of OER
- Perceived threat to traditional model (academic freedom, bookstore, traditional publisher)
- Too many competing programs/silos
- Lack of ancillary materials
- Lack of tenure & promotion for OER efforts

Institutional Opportunities

- Campus to show students they care about costs
- Show faculty they care about them as creators
- Retention
- Critical thinking for faculty and students working on OER materials together (actually change a textbook)
- Adaptation
- Open pedagogy
- Multiple points of view
- Able to update materials quickly

Institutional Threats

- Lack of funding & time (sustainability)
- Inclusive access
- Push back from bookstore
- Materials with ancillary materials ready
- Push back from faculty
- OER publishing not considered for P&T
- Push back from administration

Statewide Strengths

- Consortiums and state-wide resources (TDL, TSLAC, TLA)
- Statewide mandate SB810
- Admin attention
- Talking point
- All institutions are stakeholders
- Texas common core/ transfer credits
- Strength/value in numbers (Tx is big)
- Interest across the state

Statewide Weaknesses

- Common platform to communicate statewide

- Large size of state cumbersome
- Diversity of institution types (strength & weakness)
- Lack of awareness/limited access
- Rapid growth but slow infrastructure
- Change (admin, population)
- Policymaker lack of true understanding

Statewide Opportunities

- Create statewide awareness (especially faculty)
- Leveraging faculty talents & showcase it
- Funding (federal, state, donors, private)

Statewide Threats

- Lack of funding
- Intersystem competition (also strength)
- Lack of clear guidelines
- Potential for unmanageable volume/diversity of materials
- Conflicting priorities/interests
- Potential mandates

Table #12 ([see sticky notes](#))

Table #13 ([see sticky notes](#))

Session #2 | Top 8 Themes and Patterns

Discuss and narrow down 8 topics to 4 topics; deliverable: collect the top 4 topics generated by each team to tally a whole-group top 4.

Please capture the top 4 topics responses on a single flip chart paper; scribes please capture other responses in this Google document.

Table #1 Top 8 Themes

1. Legislative environment
 - Proactive not reactive
 - Libraries paying for OER from their collection funding
2. Funding and sustainability
 - More funding to make marketing, development (creation/adaptation) and training sustainable
3. Size and diversity of the state
 - As big as Texas is there is collaboration - a strength and a challenge
 - Technology infrastructure
4. Standardization vs. academic freedom
 - 4 college academic institutions have more Human Resources at the Master and Doctorate level to create resources for undergraduate courses
 - Enhances academic freedom - as a guiding principle not as a mandate/as a choice
5. Balancing commercial and community-based solutions

OER Summit: Table Notes

- Inclusive access - no additional fees and access to textbook since day one
- Curating materials into the library catalog
- OCLC Cloud solution for storage
- 6. Strong history of library collaboration
 - A detailed state scan
- 7. Strong backbone organizations
 - Coordinating Board
 - Texas A&M and UT Systems - geolocations
 - No statewide IT infrastructure
- 8. Texas individualism and exceptionalism
 - Growing K-12 population - "demographics is not destiny but is our best opportunity" Texas is a bellwether to be enormous Rebecca Karoff - UT System Austin
- 9. Size and diversity of the state
 - If we can be the best we can mobilize on pride

Top four - 2, 6, 7, 8

Table #2 ([see sticky notes](#))

Table #3 ([see sticky notes](#))

Table #4 Top 8 Themes

Catherine Rudowsky - Texas A&M Corpus Christi

Teri Stover- Texas A&M Texarkana

Kevin Williams- Texas A&M Texarkana

Musa Olaka- Prairie View A&M

Rogelio Hinojosa- Texas A&M International

Douglas Ferrier- Texas A&M International

David Baca- Texas A&M Galveston

Dean Hendrix- University of Texas at San Antonio

1. Legislative environment
 - a) SB 810 – Good first step, but only beginning. To make it meaningful at the institutional level this funding needs to increase
 - b) Maybe consider a model of local control over state control in future bills
 - c) Coordinated effort across districts to get a whole-hearted push / lobby strategy
2. Funding and sustainability
 - a) If we want a big statewide initiative, it has to be backed with state funding
 - b) Build OER into operating expenses – operationalize
 - c) Creation of OER is expensive
 - d) Don't mandate adoptions (academic freedom) so they have to be incentivized. Financially or T&P.
3. Size and diversity of state
 - a) OER is an equalizer across schools of various sizes and socio-economic regions
 - b) Possibly recommend the state library adds a position to focus on OER

4. Standardization vs. academic freedom
 - a) OER mandate from the top will be a killer of the initiative
 - b) Incentives over requirements
 - c) All agree that a requiring it is slippery slope and to be avoided
 - d) Educate Provost and others to communicate it in a way that doesn't threaten academic freedom
 - e) Frame it as an enhancement as of academic freedom
 - f) Balancing commercial and community-based solutions
 - g) Commercial support for OER ancillary materials is essential – Bait and switch b/c they cost (low cost vs. free) – Reality is that we need them
 - h) Large barriers (software platform, connection with the LMS, etc.) of entry to crowd sourcing these materials
5. Strong history of library collaboration
 - a) What is the library role in this, at the institutional level
 - b) Formalize the collaboration?
 - c) TexShare board role – Highjack the board!
 - d) We have also noted that collaboration across systems is not as robust as it could be
 - e) Strong backbone organizations
 - f) Our state wide organizations aren't as rooted as others (OHIOLink)
 - g) Best state-wide home for this? Thinking TexShare (State Library)
 - h) State-wide OER advisory group for lobbying efforts – board through TexShare that can then break off potentially
6. Texas individualism and exceptionalism
 - a) Texas history / Texas government – Building OER around region specific

Table #5 Top 8 Themes

Legislative environment-

Relevance-

- direct correlation to the environment of the our institutions.
- Are interested in the opportunity
- Limits to the faculty free to develop OER (impacted by tenure track teaching more to adjuncts.
- Mandates v academic freedom

Funding and sustainability-

- Affordability
- Access to the material
- Faculty turnover
- Adopting by departments rather than individual
- The infrastructure of the publishing community
- Maintain accrediting statues
- Learning outcomes by department not learning materials

Size and diversity of state

- Collaboration between colleges and universities common sections for courses
- Protecting the infrastructure of the materials

- Incentivizing to core group of faculty and professionals instead of @institution level

Standardization v. academic freedom

- Promotion and Tenure
- Commercial v. OER publicizing
- Depth of OER resources
- Level of students courses
- Cost benefit- large for core courses
- Length of access to the OER after graduation
- Targeting your audience at the starting level

Balancing commercial and community-based solutions

- Creating the larger base for use
- More leverage
- Do we pull out of the content or just the commercial companies
- Commercial companies start to muddy up the idea of OER
- Nonprofit could enhance the sustainability
- Watering down the education by doing this at a statewide level
- Hybrid solution

Strong history of library collaboration

- Continue the conversation all the way through the process
- Knowing what your library is already paying for
- Leveraging our power with commercial companies
- Knowing the rules of Copyright
- Training the faculty in the copyright laws
- Drawing on the faculty from the library schools to help build the curriculum
- Making sure that the K-12 setting know about items such as textshare

Strong backbone organizations

- All the associations and conferences, state, national
- Nobody's jobs is just OER no formal job for it
- The financial need for small institutions

Texas individualism and exceptionalism

- Strong collaborative to have a better program
- As texas goes so does the nation
- Get buy in by multiple institutions participation
- Liberal Arts v. trade vocational college

Table #6 Top 8 Themes

Question 1: To what extent is this relevant to your institution?

1. Legislative Environment

- TLA does a good job of keeping libraries at the forefront of state
- How should this be addressed at the state level
- Get people in office who are educators
- SB 810 anchored by THECB is an effort to keep educators involved in legislative action/committees

- Amount of money in legislation right now is marginal, how was budget selected/developed
 - Previous legislative efforts, impacted by political climate, identify legislators that will work with you, advocate for OER.
 - Student Advocacy could potentially play a role; Student initiative can have a strong influence.
2. Funding and sustainability
- Can't do it if you don't have funding unless you want a lot of people volunteering
 - Funding provides an incentive to faculty
 - Funding for institution to devote resources (staffing , other resources)
 - Does anyone have a fund for OER at their campus –NO
 - Has anyone have an institution that has not had budget cuts in last five years?
 - Budget flat, but not shrinking
 - We worry about sustainability, have done pilots but thinking down the road, “if people take advantage of this, how do we keep it going?”
 - Real sustainability pertains to how faculty select and maintain curriculum
 - Needs to be recognition that there can be a different curriculum model
 - Mandating at state level, Mandate vs. Grass Roots efforts
 - What is the incentive for changing curriculum if they are not getting rewarded for it
 - P&T will have to change at university level.
3. Size and diversity of State
- Brainstorm with TDL people about DSpace brought up idea of webinars, spoke up – hate webinars – someone from far away brought up that it was the only way they could participate in a lot of stuff. Webinars allow places like El Paso, and Lubbock to participate
 - Tie in to distance learning and infrastructure.
 - S&D of state could be used an argument for legislative funding
 - OER supports a diversity of viewpoints. OER allows for mixing and matching to align with what you want as opposed to state textbook selections
4. Standardization vs Academic Freedom
- Maybe mandate of standardization should be on tools not content.
 - Does not have to be just one open text for a course. I don't know that choice goes away. It's just we need more option, ,a different model
 - Negative – what we see in K12 – standardized testing
 - There has to be some balance to how these things are chosen, can't be a mandate on what we are going to use. Needs to be flexibility
 - Think OER is all about flexibility
 - Ways to achieve lower costs of textbooks, lower cost is not the same thing as loss of academic freedom. Have to get publisher buy in to do that, some publishers come out

with new edition every year and then don't make the old edition available forcing purchase of a more expensive text.

5. Balancing Commercial & Community based solutions

- When talking about inclusive access making sure that OER is not lost.
- Publishers can make money off inclusive access, because it ensures all students purchase course materials
- Feel like partly that is what they were talking about yesterday, is some cases working with publishers but also creating homegrown options. Looking at a range of options that are an improvement over current options
- Inclusive access is seen as a compromise in that it gets faculty involved in the discussion of lowering cost while keeping the text they want.
- Goes beyond just the publishers to the bookstore on campus, they have to make money and the main way they make money is on books. Have to have one location where students can get information.
- Does the bookstore make money of the books or the merchandise?
- Courses using OER identified on campus registered, but some schools are using the bookstore to identify. Bookstore not connected to course system, takes to bookstore homepage not the actual text for that course so then you have to search for, and separates OER content from traditional content forcing students to search it.
- What we have noticed is we have to walk the line carefully and not talk just about OER needs to be a broader conversations about options

6. Strong history of library collaboration

- UT System buys a lot of stuff together
- We fall into mindset that key issues are legislation and funding, that is not what we do, why don't we concentrate on what we do really well. Curating resources, working with faculty.
- Can we achieve change at institution level?
- Work with faculty from the ground up and use the library to curate/index resources

7. Strong Backbone Organizations & Texas Individualism and exceptionalism

- Don't like collaboration because we don't get all the credit
- Legislative environment sets its up so that we are competitors, if we increase someone else has to decrease
- Texas does not like to be on top, what to be first, but don't fund like we want to be on top.
- For profit attitude, not for people attitude

Top 4 Topics

1. Strong history of library collaboration
2. Standardization vs Academic Freedom

OER Summit: Table Notes

3. Texas Individualism and Exceptionalism
4. Funding and Sustainability

Table #7 Top 8 Themes

Theme discussion

To what extent is this relevant for my institution

How should topic be addressed by state

1. Legislative environment
 - a. Yes, examples
 - b. Consortia can advocate. What statewide advocates are there for our different types of institutions.
2. Funding and sustainability
 - a. Huge - we all need the funding. 2 year institutions are showing interest and need money; 4 year may have more differences
 - b. Who owns the course? It has to be open....has to be made available- if state repository comes to fruition
3. Size and diversity of the state
 - a. Yes, issue at the local level, especially smaller more rural institutions
 - b. Role for leveraging equity and transferability.
4. Standardization vs. academic freedom
 - a. OER is customizable - so more freedom. Fear that a mandate to use OER will curb freedom. But how you develop/use the OER can definitely be local
 - b. Learning outcomes for core are already pretty standardized for transferability.
5. Balancing commercial and community-based solutions
 - a. Small institutions have a greater need for more costly technology (homework platform for example)
 - b. State role to help with equity
6. Strong history of library collaboration
 - a. Existing local consortia
 - b. State level may be better equipped to craft common message/solution
7. Strong backbone organizations
 - a. Tradition is there of different organizations
 - b. TLA, ICUT
8. Texas individualism and exceptionalism
 - a. Have not used some of our resources, like open stax to the fullest
 - b. Make sure to allow for individualism

Table #8 Top 8 Themes

LEGISLATIVE ENVIRONMENT

FUNDING AND SUSTAINABILITY

STANDARDIZATION VS ACADEMIC FREEDOM

STRONG BACKBONE ORGANIZATIONS

Table #9 ([see sticky notes](#))

Table #10 Top 8 themes

1. Legislative environment:

- Can be helpful
- Budgets/state appropriations
- Very relevant
- Advocacy from TLA
- Statewide scaling
- Informing the legislature and vice versa
- Identify and develop champions in the legislature
- Showing value of programs to legislature
- Utilizing PACs

2. Funding and sustainability

- Sustained interest-will it still be sexy next year?
- Commitment to ongoing funding
- Shifting priorities
- Leveraging the existing momentum
- Sustaining the existing collaborations

3. Size and diversity of state

- Not as relevant for small/stand-alone institutions
- One size doesn't fit all
- Promote our ability to become national leaders
- Leverage size and diversity for grants

4. Standardization vs. academic freedom

- Faculty buy-in is essential
- Relevant for all institutions
- Statewide: make sure legislative mandates do not infringe on academic freedom
- Consistency in SLOs and how it impacts existing OERs
- Opportunity to educate faculty on how OER can support and enhance their academic freedom

5. Balancing commercial and community-based solutions

- Statewide: making very clear what resources currently exist
- Statewide: create a menu of low-cost and no-cost OERs for faculty and institutions to pick and choose from

6. Strong history of library collaboration

- Don't have to reinvent the wheel: exiting groups

OER Summit: Table Notes

- Libraries are discipline agnostic
 - Libraries in Texas have a strong reputation for being collaborators
 - More opportunities for libraries to collaborate with non-library associations (ie. teachers, administrators etc)
 - Statewide: funding and support for existing efforts or dedicate staff
7. Strong backbone organizations (identified as TSLAC, TLA, THECB etc)
- Exceedingly important as this is the level our administrators report to
 - Communication from backbone orgs and support is critical
8. Texas individualism and exceptionalism
- Stop competing and start working together
 - Need to create an inclusive and sharing environment (small colleges, HBCUs)
 - Need to address Texas' propensity to want to do things its own way: resistant to adopting other state models
 - Focus on content

Table #11 Top 8 Themes

Top 8 themes – statewide opportunities & threats

1. Legislative environment
2. Funding & sustainability
3. Size & diversity of state
4. Standardization vs academic freedom
5. Balancing commercial and community-based solutions
6. Strong history of library collaboration
7. Strong backbone organizations
8. Texas individualism & exceptionalism

To what extent is topic relevant to your institution?

How or should this topic be addressed by the state?

1. Legislative Environment
 - Tagging OER courses (institution)
 - Sticks & carrots (state)
 - Incentives vs mandates
 - Educate policymakers on whole affordability issue
2. Funding & sustainability
 - Need support too (time, FTE, etc.)
 - Should support entire institutional environment, not just individuals (who may have received grants individually)
 - Sustainable use in teaching (academic freedom)
 - More coordinated effort (multiple institution)
3. Size & diversity of the state
 - Less resources at smaller organizations

- Opportunities for institutions to prepare students (community college à 4 year)
- 4. Standardization vs academic freedom
 - Mandates will not be well received ever
 - Push from students to select courses with OER over ones that don't
 - Need clear communication & transparency (higher ed ↔ legislation)
 - Getting faculty & admin to understand there's options
- 5. Balancing commercial & community-based solutions
 - Bookstore partnerships mutually beneficial (data collection, options, priority)
 - OER partnerships for the whole state
 - Negotiating resources with everyone at state level
 - Transparent, fair, & coordinated commercial practices
 - Better awareness about what TX institutions produce
- 6. Strong history of library collaboration
 - Existing consortia & networks
 - Need to highlight institutions besides the usual ones
 - Need more internal library support (subject liaisons, etc)
- 7. Strong backbone organizations
 - SPARC, TLA, TSLAC
 - Support organizations with infrastructure at local level
- 8. Texas individualism and exceptionalism
 - Diversity of students learning styles and levels
 - Student success
 - Using other states as examples for statewide initiatives
 - Rural/urban issues & priorities

Table 11 voted on top 4 topics: #2, 3, 4, 6

Table #12 ([see sticky notes](#))

Table #13 ([see sticky notes](#))

Session #3 | Goal Statements

Table #1 Goal Statements

Funding & Sustainability

1. THECB collaborative effort with yet to be defined coalition to lobby for secure funding to follow through with the elements outlining in the feasibility study and to align with the 60x30.

Strong history of library collaboration

2. TSLAC will help facilitate a change in culture by bringing the other state agencies together and capitalize on the strong history of library collaboration by asking the state library to expand collaboration to the state agencies by 2020.

Standardization vs academic freedom

3. Yet to be defined coalition will change the culture by creating a statewide coalition across institutional lines, with a variety of stakeholders to honor faculty content expertise and create core course solutions that aid students in 60x30 with open licensed materials while clearly defining the open education landscape.

Table #2 ([see sticky notes](#))

Table #3 ([see sticky notes](#))

Table #4 Goal Statements

Funding & Sustainability

- By 2021, increase funding of SB810 to \$5 million annually and tie it to 60x30

Standardization vs. Academic Freedom

- By 2021, develop a directory of adopted OER textbooks in the state of TX to encourage adoption
- We think that in general this is a value statement rather than a goal, making it difficult to write a specific goal

Strong History of Library Collaboration

- By 2021, create an OER advisory committee representative of higher education under the Texas State Library facilitated and coordinated by 5 full-time staff

Single Focused Theme

Funding & Sustainability

Table #5 Goal Statements

Some faculty would believe that if they see the word library they would have another reason to put up walls, but faculty believe that if they have the idea and that they are leading this they are more likely to take an charge and a more effective role.

Funding and Sustainability

- Identify key components of statewide fundraising and sustainability.
- Full time statewide OER Coordinator
- Statement: By 2021 obtain funding to create a statewide OER infrastructure that addresses the needs of all stakeholders.

Standardization v, academic freedom

- Statement: By 2021 conduct a data driven PR campaign to educate stakeholders (faculty, staff and students) on the benefits of the OER and affordability options that are available to them.

Strong history of library collaboration

- By 2021 provide Texas higher education institutions access to a publishing platform, that includes shared support, for newly created and adapted OER.

Table #7 Goal Statements

Which of the 4 topics?

1. Legislative environment
2. Funding & sustainability
3. Standards vs. academic freedom - essential to get faculty on board, and for transferability
4. Strong history of collaboration - can be the foundation for all other themes/efforts

Goal statement for each:

Funding & sustainability: identifying what we need funding for (needs assessment) and where can it come from. Identify opportunities and sources. Look at other states. Needs assessment can be done at individual institutions, but results get collected and curated at one place.

Goal: Equitable funding statewide to support the adoption, creation, and growth of a strong OER program in TX.

Standards vs. academic freedom: Educate and convince faculty that OER doesn't have to infringe on academic. Create common framework/white paper to publicize common definitions

Goal: Develop an OER Council with representation from all stakeholders to create a framework to guide OER use in Texas.

Strong history of collaboration:

Goal: Leverage the power of existing library organizations to increase OER programs across the state of Texas.

Table #8 Goal Statements

FUNDING AND SUSTAINABILITY

STANDARDIZATION AND ACADEMIC FREEDOM

LEGISLATIVE ENVIRONMENT

Table # 10: Goal statements

(What is most urgent/important topic to address, what is the low-hanging fruit, what measurable thing do you want to have in 3 years?)

1. Funding and sustainability
 - By 2021, develop list of sources for funding and purpose for each
 - ... draft bill for X biennium
 - By 2021, (a statewide effort) will secure initial statewide funding and commitment for ongoing initiatives (potentially from national foundations or governmental funds) for scaling the adoption of OER (in core/gen-ed courses)
2. Standardization vs. academic freedom
 - Get a task force to identify current activities surrounding OER and draft statements. Task force should have multiple stakeholders (registrar, student, financial aid, etc. from variety of institutions).
 - Identify what things could benefit from being standardized.
 - Example: Standardize what "low cost" and "no cost" means.

OER Summit: Table Notes

- X% of higher-education faculty surveyed report positive perception of OER
 - X% of higher-education institutions have adopted OER for 10% of courses offered
 - Convene a statewide task force to standardize training with goal of having 25% of faculty OER-trained by 2021.
3. Strong history of library collaboration
- By 2020, institutions across the state will adopt a shared memorandum of understanding to cooperate on OER (including shared definitions).
 - Leverage library partnerships to participate in non-library academic associations in order to advocate for and educate about OER.

Table #11 Goal Statements

Top 4 themes after voting from all tables

1. Legislative environment
2. Funding & sustainability
3. Standardization vs academic freedom
4. Strong history of library collaboration

Vote on top 3 of the 4

1. Funding & sustainability
2. Standardization vs academic freedom
3. Strong history of library collaboration

Create goal statements for top 3 tops as if for a 3-year strategic plan

- Funding & Sustainability
- \$\$\$ legislative à institutions
- Incentives for faculty to create/adopt
- Course release
- \$ for training faculty on OER topics (in-depth)
- Create culture change
- ROI
- Research on student success & impact

Goal statement: THECB will provide \$1 million per year for 5 years to support institutions in developing & implementing OER across the state.

Standardization vs academic freedom

- Aligning language for all options improve teaching practice
- Incentivize materials by ensuring they are useful for faculty
- Creative resources people want to use
- Sharing best practices = statewide effort
- More interchangeability between quality materials
- Buffet including OER

Goal statement: Provide training to faculty on best practice to increase awareness and adoption in Texas by 20% per year.

Strong history of library collaboration

- Use existing networks for training – especially for those not directly involved
- Partnerships to leverage accreditation
- More collaboration for OER within disciplines

Goal statement: Provide trainings through partnerships with library and disciplinary professional organizations.

Discussion followed:

Comments about education student government associations and see if they'll write a resolution National Center for Case Study Teaching in Science <http://sciencecases.lib.buffalo.edu/cs/>

Table #12 Goal Statements

1. Develop a strategy for (1) sustainability (funding, maintenance, meeting emerging needs) and (2) funding priorities that can best be met at a statewide level.
2. Coordinate efforts to leverage OER best practices statewide, enhancing and promoting academic freedom.
3. Encourage statewide OER development and deployment by uniting all stakeholders to build on existing networks (institutions, agencies, associations and consortia).

Session #4 | Synthesis: Strategies and Next Steps

Table #4 Synthesis

Present State:

- Sketch: Piggy bank with \$1.00 in it
- Weak from the state, but a start. \$200,000 is drop in the bucket for costs and state our size.
- Varies greatly among institutions

Desired State:

- Full bank with funding shared out to institutions

Table #7 Synthesis

Survey of research on the impact of OERs adoption on students:

<https://openedgroup.org/review>

Example of a Student Government resolution on OER from Texas A&M University:

Table #10 Synthesis

Choose one of the themes: where are we at, where are we going, how do we get there.

Funding & Sustainability

- Student Government Resolution

- In 2017, University of Texas at Arlington's Student Congress passed Resolution 17-30, "Free or not free, That is the Question," which seeks to promote the use of OER. The text is available here: <https://www.uta.edu/studentgovernance/sc/database/resolution.php?resnum=17-30>
- Texas State University's is more robust. Bruce will provide Texas A&M's example.

Table #11 Synthesis

Bridging the gap activity

- Pick 1 of 3 topics to draw out
- Table 11 picked standardization AND academic freedom (no longer want them to be in opposition)
- Our doodle consisted of the present state (chasm) and desired future state (shaking hands) between standardization and academic freedom. In the middle were ways to bridge the gap in 6 months which were:
 - Training
 - Communication
 - Awareness
 - Collaboration
 - Options & choice