



Campus Alberta OER Program Evaluation

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on behalf of the Campus Alberta OER Steering Committee

March 31, 2017



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Supplementary Report:

OER ENVIRONMENTAL SCAN 2015-2017



RECOMMENDATIONS

Campus Alberta OER Steering Committee
March 31, 2017

The following recommendations have been developed throughout the duration of the Campus Alberta OER Initiative. November 2016 to March 2017, the recommendations were further refined and validated through project data collection, stakeholder engagement surveys, environmental scan(s) and consultation with the MOU participants (British Columbia Ministry of Advanced Education and Saskatchewan Ministry of Advanced Education).

The Campus Alberta OER Steering Committee has identified three recommendations to sustain efforts achieved during the initiative.

1. Key Messages from Ministry

- State endorsement of open educational resources and practices.
- Enable institutional strategies to align with open education objectives.

Messaging from Ministry will support institutions who are actively adopting open educational resources to mobilize institutional investment to support sustainability of these efforts. **Endorsement of open educational resources and practices** by the British Columbia and Ontario governments has been a key driver of success in open education initiatives. Alberta provincial stakeholder interviews indicate institutional support of dedicating course design time to adopt OER is varied.

Executive sponsorship will go a long way in sustaining the implemented adoption pilots to maximize forecasted cost recovery and drive commitment to open education practices within institutional structures.

“Access to learning resources that support programs of studies will contribute to Albertans’ successful participation in learning”

Goal 2: Albertan [learners] have the necessary skills and supports to participate in and benefit from learning. Campus Alberta Framework

2. Provincial Access and Engagement

- Sustain contribution to and use of Alberta OER Repository.
- Support institutional efforts to adopt open educational resources.

Development of the **Alberta OER Community of Practice** through stakeholder engagement and institutional working groups will build capacity among early adopters and institutions with strategic alignment to open education. Open education is recognized as a grassroots movement anchored on centralized coordination in British Columbia, Ontario, and Manitoba. The connection to teaching and learning and library resources is necessary for sustainable change as seen by efforts in Saskatchewan and centralized models in other provinces. As modeled by BCcampus, measurement of open education initiatives involves active community engagement efforts.

Sustainability of the **Alberta OER Repository** will allow the province to maintain momentum of the open education movement and maximize forecasted cost recovery of OER adoptions. Alberta-created open textbooks which currently reside in the Alberta OER Repository are gaining national attention for re-use and potential collaborative projects.

British Columbia, Ontario, and Manitoba maintain a provincial repository for OER and recognize this infrastructure as a necessary means to generate access, awareness, and monitor use of open textbooks and ancillary resources. Monitoring repository use is a key way to measure adoption, allowing the identification of institutionally-funded OER adoption efforts and their savings.

“Nurturing cross-sectoral collaboration among learning providers, strengthening mechanisms for prior learning and informal learning recognition, and improving access to/enhancing province-wide library and information networks will contribute to the development of a province-wide learning community.”

Goal 1: Albertans are members of a province-wide learning community. Campus Alberta Framework

- 3. Strategic Partnerships**
- Reinforce cultural shift toward open educational resources.
 - Partner with provincial and national efforts; maximize learner impact and cost savings.

As represented in cost savings realized in Fall 2016 and forecasted cost recovery of the initiative, strategic award funding has potential for high yield of cost savings to students and institutions. Early adopters funded by ABOER receive varied incentives to maintain use of open textbooks. Expanding existing and new open textbook adoptions to a provincial level and creating resources of provincial and national application are valuable next steps in reinforcing the cultural shift occurring within institutions and showcases Alberta’s dedication to accessibility of education.

Currently, British Columbia and Alberta are considered Canadian leaders in open education. Investing in specific OER implementations with consideration of provincial reach and national collaboration will maintain Alberta’s position as a Canadian leader in open education. Activity within other provinces and the growth of the Canada OER network over the last year lends well to partnerships and shared momentum across the nation.

As referenced in the Funding Scenarios section, the scenario of specific investment in OER adoption is explored including leveraging a newly created and adopted ESL book at a provincial level and collaborating with Ontario on trades-specific projects.

Scenarios

further details for consideration in APPENDIX I: Funding Scenarios

3 Year Plan	\$1.8M	1 Year	\$230,000	1 Year	\$80,000	No Funding
Community development Centralized coordination Centralized OER support		Community development Centralized coordination Centralized OER support		Community development Centralized coordination		Community development may occur organically
Grant awards coordination		No grant awards		No grant awards		
<ul style="list-style-type: none"> - Indigenous OER Development - OER Fellows Program - OER Adoption Strategy - Annual OER Summit - Peer Reviews 						
<p style="text-align: center;">\$200,000 invested in Adoption Pilots</p> <p style="text-align: center;">Cost recovery of \$1.76M in 2 years</p>						

Table 3, Appendix

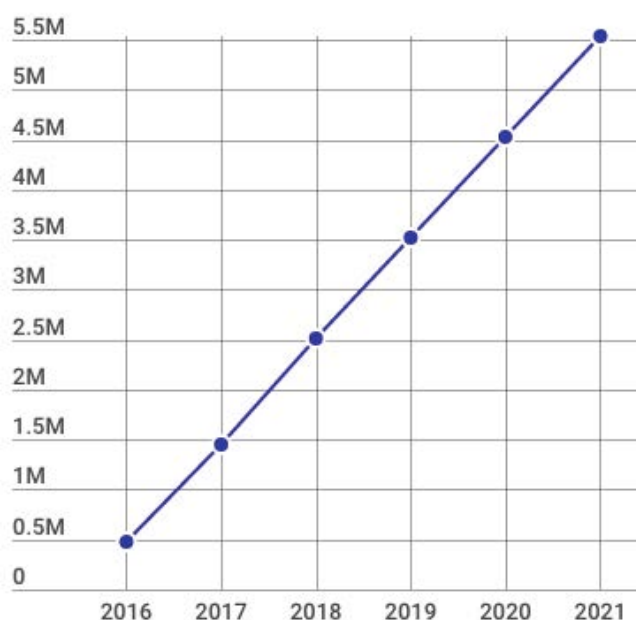
COST SAVINGS

In 5 years open textbook adoptions are forecasted to realize \$5.5M in cost savings.

Table 1, Appendix

Open education initiatives support the foundational objectives of Government of Alberta's 2017-20 Fiscal Plan to ensure that education and training remains affordable and predictable.

Cumulative Savings: Adoption Pilot Awards



Adoption pilot projects conducted in Fall 2016 resulted in cost savings to students of \$482,258.99 for that term due to the replacement of commercial textbooks and/or class resources with free, openly licensed learning content.

Based on annual enrolment expectations cumulative savings are projected to be \$5,534,398.89 over 5 years.

\$200,000 invested in Adoption Pilots will recover all ABOER grant awards, (\$1.76M) through student savings in 2 years

Table 3, Appendix

Realized Savings	Projected Cumulative Savings (based on 2015/16 enrolments)				
Fall 2016	2017	2018	2019	2020	2021
\$482,258.99	\$1,492,686.97	\$2,503,114.95	\$3,513,542.93	\$4,523,970.91	\$5,534,398.89

**OER Development:
Potential to recover invested funds
within 1 year of OER adoption**

Table 2, Appendix

Beginner Spanish OER was implemented in both Athabasca University and the University of Calgary resulting in cost savings in Fall 2016 of \$133,700. These savings will return almost 5 times the investment in 5 years. Table 3, Appendix

Reinforcement of cultural shifts toward open education can ensure sustainability of realized and forecasted cost recovery

Initial ABOER awards (\$1.7M) results in cost savings of \$1M per year

Table 1, Appendix

ROI OF ESL OPEN TEXTBOOK CREATION & ADOPTION

Cost Savings at Bow Valley College and NorQuest

In August 2015, Bow Valley College and NorQuest College were awarded \$200,000 to create an open textbook to support English as a Second Language courses in Alberta. On March 22, 2016, Bow Valley College and NorQuest were funded \$10,000 each to pilot the adoption of this resource. Both institutions supplemented this funding (\$37,500 and \$29,000 respectively). The initial award cost of \$220,000 to create and adopt the ESL open textbook, will save \$302,500 in student and institutional costs over 5 years.

ABOER Award	Institution Funding	Total	Cost Savings Fall 2016	Projected Savings 5 years	**Cost Savings Opportunity Province-wide	
					Annual	5 years
\$220,000	\$66,500	\$286,500	\$15,000	*\$302,500	\$4,584,500	\$22,922,500
COST			COST RECOVERY		OPPORTUNITY	

*estimated at \$187,000 to students and \$115,000 to the institution; BVC and NQ

** estimated 45,845 students annually across the province

Fall 2016 ESL Open Textbook Adoption Pilots:

Institution	Courses piloted in Fall 2016	Textbook Original Cost	Textbook New Cost	Enrolment Fall 2016	Cost Savings Fall 2016
Bow Valley College	Regional LINC Combined Skills Level 4 - 6 LINC Listening and Speaking Level 6 LINC Reading and Writing Level 6 LINC Listening and Speaking Level 6 Regional LINC Combined Skills Intermediate ELL	\$100	\$0.00	115	\$2,000
NorQuest College	LINC 1528, LINC 1518, LINC 2005	\$100	\$0.00	130	\$13,000

NorQuest and Bow Valley College replaces commercial textbook, projects yearly cost savings of \$60,500

The ESL open textbook can be used by CLB 5/6 and LINC 5/6 learners studying ESL across Alberta, including hundreds of learners taking ESL CLB 5/6 classes at post-secondary institutions across the province. These resources can also be used by over 45,845 learners served annually by over 150 community learning hubs in the Alberta Community Adult Learning System (CALS). This is forecasted as \$4,584,500 cost savings annually, \$22,922,500 over 5 years.

ESL Open Textbook can save over \$22M over 5 years if implemented throughout Alberta

STUDENT FEEDBACK

91% of learner respondents reported that they will use the resource again in future.

73% of learner respondents have recommended the resource to at least one other English language learner.

INSTRUCTOR FEEDBACK

"It was so helpful to have level and content appropriate resources that matched my outcomes and tasks for my class. It saved me time. It saved me stress, knowing that these were activities designed for learners just like mine.

OER BEYOND TEXTBOOKS

There are three key objectives that motivate people to participate in the promotion of OERs: to reduce student costs, to increase quality of teaching materials, and to make educational material more accessible and discoverable. Within the AB OER community, those interested in increasing awareness of OER and encouraging their adoption often fall into one of the following six stakeholder groups: students, government, educational institution leadership, faculty, teaching and learning units, and libraries. However, it is clear that each of these groups has a different relationship with the three key motivators listed above.

Cost

Students, government, and educational institution leadership are interested in the student savings achieved as a result of replacing a paid textbook and/or other fee-based learning resource with a free resource. These savings can be significant, particularly in the case of high enrolment courses.

\$482,258.99 in textbook fees saved in Fall 2016

Quality

The quality of a resource and its impact on teaching is of primary concern to both faculty and teaching and learning units. Research conducted on learning resource use indicates that many students avoid purchasing high price textbooks. An expensive textbook therefore has the unintended consequence of leaving students without an important learning resource and contributes to poor grades and decreased quality of learning. Thus, resource access is a key consideration for faculty selecting learning resources as it has a direct impact on student outcomes and learning quality. Input from the Alberta OER Community of Practice indicates that OER initiatives increase collaboration among faculty, libraries, and teaching and learning units and lead to better use of resources that aid in the promotion and development of effective pedagogy.

Access and Discoverability

OERs are aligned with the mandate shared by many publicly funded educational institutions, mandates that emphasize excellence in teaching and research in service of students and society. Making high quality educational material discoverable and accessible to the broader public is a vital component of the work of libraries and teaching and learning units.



Figure 1. The converging and diverging interests of stakeholders. Adapted from McNally, Michael B. "Design vs. Pedagogical Considerations for OERs." Paper presented at IL-Palooza, Edmonton, AB, 23 April 2015.

Although each of these groups indicated that their interest in open educational resources was generated by one or all of the factors described (see fig. 1), it is perhaps the relationship between these three motivators and the various stakeholder groups that has shifted Canada's open education movement from a focus on open textbooks to a focus on open education, as in the BC Campus mandate, and open pedagogy, as in the University of Saskatchewan mission.

From open educational resources to open education

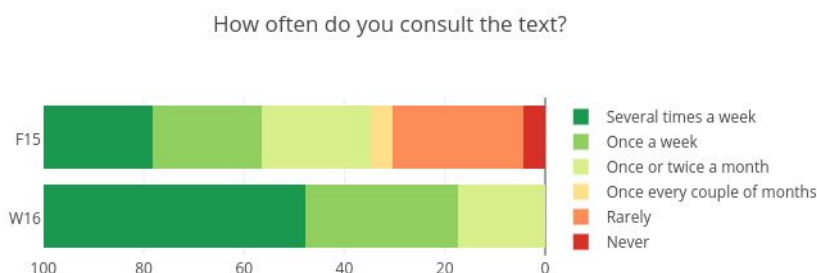
An emphasis on a less specific adoption of openness allows for broader stakeholder engagement and a more accurate representation of the potential and products of the OER movement.

QUALITY OF TEACHING AND LEARNING: Two Case Studies

Open Logic at University of Calgary

“The study sessions improved immeasurably, as the accessibility of the text enabled lively and probative group discussion. The students hardly knew to whom they were indebted: this free textbook (which one student called a “lifesaver”) bore the name of no author.”

Excerpt of student letter of support for Richard Zach, re: University of Calgary Teaching Award for Educational Leadership
Dana Hägg, Juris Doctor Candidate (2018), University of Calgary, BSc, Pure Mathematics with minor in Philosophy



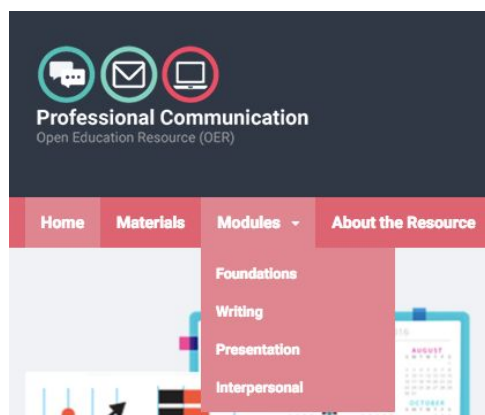
When given the opportunity to write an OER textbook for his course Logic II at University of Calgary, Richard Zach surveyed his students. Student response indicated substantial increase in the use of the zero-cost open textbook in Winter 2016 (W16) as compared to the \$40.00 commercial textbook used in previous term, Fall 2015 (F15).

Source: Student Satisfaction Survey Results, <http://openlogicproject.org/2016/08/05/student-satisfaction-survey-results/>

Open Professional Communications Text at Olds College

Workplace / professional communication was the subject-matter selected for OER development due to the potential province-wide use. The OER was developed using talent from across Canada, led by the Educational Technology and Curriculum team at Olds College. The resource replaced the commercial textbook: Northey, M., and McKibbin, J. (2011). Impact: A Guide to Business Communication. Pearson in COM 1020 - Workplace Communication in 2015/16 term resulting in cost savings to students of \$22,500 in Fall 2016, projecting continued cost recovery of \$225,000 over 5 years in student savings.

The Professional Communication OER will be of use in the following courses in the future: COM 1030 - Workplace Professionalism, COM 1050 - Business Communications, COM 2020 - Advanced Communications, COM 2250 - Strategic Communications.



“The students are very excited that the resources we are going to use for the class are free and are available online.”

“One thing I like about the OER is it provides a lot of sample materials and activities. I’ve been able to go into the OER and adapt it to my lesson or my classroom.”

Keith Friedlander, Communications Instructor, Olds College

Quoted from Olds College promotional video for open educational resources; “OER Video 2.0”

FUNDING SCENARIOS

The following scenarios aim to establish accessible expertise across Alberta and scaffold sustainability of the OER movement at an institutional level. During the Campus Alberta OER Initiative, in-kind efforts have grown. The provincial awareness of the role of institutional support units for OER has increased as evidenced by the quality of expressions of interests in Phase 2 and provincial community surveys.

FUNDING SCENARIO 1 - \$1.8M over 3 years

Active awards programs. Maintain momentum from Alberta OER Initiative. Generate active and organized institutionally-based efforts and provincial Community of Practice.

This scenario entertains a 30% increase in central coordination budget as compared to the 12% administrative allocation previously applied to the Campus Alberta OER Initiative grant. This increase is to address the time required to dedicate strategic consultation throughout the program and build a Community of Practice through relationship building.

- Grant awards coordination	1.0 OER Coordinator	\$100,000	Opportunity:	Considerations:
- Community development	1.0 Grant Coordinator	\$65,000		
- Centralized coordination	0.5 OER Generalist	\$65,000	- Community development	- Scaffolding of future
- Centralized OER support	Repository	\$20,000	- Centralized coordination	institutional responsibility
			- Multi-year system-wide impact	of OER will require keen
				communications planning

\$250,000 annually, **\$750,000 over 3 years**

Annual Alberta OER Summit

Annual Budget of \$60,000 + institutional in-kind contributions.

Annual OER Summits are reported by BC and Ontario as a method for community development, capacity building, and result in provincial collaboration projects.

\$180,000

OER Fellows Program Launch

Develop regional open education capacity through collaboration.

Stakeholder engagement to develop institutional and regional capacity, faculty engagement, skills workshops, subject-matter-specific collaboration initiatives, and an open education mentorship program. A 3-year sustainability plan will aim for the OER Fellows Program as a one-time award.

\$150,000

Peer Reviews

Continue to contribute to the peer review of quality Canadian OER.

\$250.00 per review

Peer Review Funds are an active staple in other provincial OER initiatives. By supporting the academic standing of quality OER, peer reviews also provide faculty members an opportunity to explore open education with low commitment. Manitoba has relied on their peer review program as a starting point for one-to-one consultations and OER 'road shows' with faculty. BC continues to fund peer reviews of their provincial OER collection, an activity Alberta has yet to promote. (Previous fund was for review of global OER.

\$20,000

***Foundational Learning.** Further adoption of the ESL open textbook would reduce financial assistance required from Foundational Learning Supports. (Fiscal Plan 2017-20)*

OER Adoption Strategy

Province-wide adoption of OER in 3 major courses over 3 years.

Adoption pilots equip the institution with a broader view of open education by requiring OER adaptation and/or creation, course design, and implementation. This intrinsically equips the institution with stronger internal capacity to conduct more OER adoptions in the future, and reinforces the scope of responsibility of curriculum and resource development within institutions.

Cost savings from adoption pilot efforts have proven higher than that of funding specific to OER development. For this reason, funding for the adoption of OER in 3 major courses in Alberta is considered the highest return on investment.

\$500,000

1. Polytechnic and trades-specific OER adoption to support the expansion of apprenticeship training opportunities.
2. Adoption of existing Alberta-created English as a Second Language open textbook for level 5 and 6 courses. Currently in use at Bow Valley College and NorQuest College with potential for implementation across the province. (Fiscal Plan, 2017-20)

***Apprenticeship Delivery.** Adoption of OER in trades supports expansion of training opportunities and increases affordability and access to apprenticeship programs. (Fiscal Plan 2017-20)*

Indigenous OER Development

OER development of Indigenous content specific to high enrolment courses which will replace existing paid resources, and/or drive stronger Indigenous perspectives in Alberta post secondary learning.

Although curriculum and resource development is not within the mandate of Advanced Education, the development funding is included for consideration to align Alberta initiatives with national efforts.

As reference, \$80,000 was the average cost of resource creation in Phase 1, which is consistent with the average of eCampus Ontario's Open Content Development Fund (which has funded \$2M RFPs thus far). eCampus Ontario and University of Regina Press are currently funding development of Indigenous OER content.

\$200,000

3 Year Grant / RFP

\$1,050,000.00

Operations and Grant Administration

\$750,000.00

3 Year Funding (Operational + Awards):

\$1,800,000.00

Funding scenario 2 and 2.5 outline the opportunity to dedicate effort to sustaining ROI of previous funding initiatives through development of the Community of Practice and collaborative research project to document a provincial business case for open education.

FUNDING SCENARIO 2 - \$230,000 per year

No awards programs. Maintain Ministry exposure to open education activities. Organic development of past OER efforts.

- No grant awards	.75 OER Coordinator	\$75,000	Opportunity:	Consideration:
- Community development	0.5 OER Generalist	\$65,000		
- Centralized coordination	PD Operations	\$10,000	- Supports champions	- Does not invest in new OER development
- Centralized OER support	+ institutional efforts	in-kind	- Dedicated effort for community development	- Does not actively facilitate collaboration
	Annual Summit	\$60,000	- Centralized view of provincial movement	
	+ institutional efforts	30% in kind		
	Repository	\$20,000		

\$230,000 annually

FUNDING SCENARIO 2.5 - \$80,000 per year

No awards programs. Maintain ministry exposure to open education activities. Organic development of past OER efforts.

- No grant awards	0.5 OER Coordinator	\$50,000	Opportunity:	- Supports champions
- Community development	PD Operations	\$10,000		- Coordinated community development effort
- Centralized coordination	Repository	\$20,000		- Centralized view of provincial movement
				- Develop CoP and leverage in-kind support

\$80,000 annually Considerations: - Does not invest in new OER development

Funding scenario 3 addresses the risks of no further government funding for open education initiatives in Alberta.

FUNDING SCENARIO 3

No funding for continued efforts; continued momentum of OER lies with the institutions.

- No grant awards	Opportunity:	Risk:
- No centralized coordination	- Active institutions may invest funds for institutional-based initiatives	- Government support of open education will be perceived as low
	- Open education may fit in the mandate of a future replacement of eCampusAlberta	- Alberta's efforts will no longer parallel other provinces
		- ROI from ABOER funded projects may decline or go unmeasured
		- Use of funded OER implementations is at risk of declining
		- Lack of sustainability of the Alberta OER Repository
		- Reliance of in-kind contributions for CoP development
		- Efforts are less likely to result in system-wide impact
		- Alberta OER momentum will stagnate

SUSTAINABILITY OF ALBERTA OER

Centralized coordination currently provided by contract employee within UAlberta, Faculty of Education.

To date, a program manager has been dedicated to the initiative with hours ranging from half to full time. This role has focused on facilitating steering committee processes, development of the Community of Practice and administration of grant distribution. Continued funding for an OER Coordinator role would be valuable with a mandate to maximize cost savings of previously funded projects and advise on future provincial or institutionally-funded projects.

- Capitalize on existing momentum to maximize ROI
- Develop provincial OER Community of Practice
- Forge provincial partnerships on OER initiatives
- Execute an institution-based capacity building strategy
- Ensure Alberta's efforts in the national open education movement
- Research and assess OER metrics; cost savings, instructional quality, institutional engagement, provincial and national impact, etc.
- Coordinate / deliver OER education calendar
- Oversee operational contracts (e.g. repository)

Continued funding to for provincial coordination efforts is included in Funding Scenarios outlined in Section 2 (\$80-230k/year)

Opportunity

1. Maintain coordination of unique entity of Alberta OER.

2. Continue funding to support a single institution to take leadership of provincial coordination.

3. Invest in specific funding initiatives led by institutions with grant administration occurring at the Ministry level.

Considerations

1. This is the national standard. The current Alberta OER model executes OER provincial engagement in a fashion which supports potential growth of service lines to begin filling gaps resulting from the dissolution of eCampus Alberta.

2. Athabasca University and University of Calgary have been the most active grant projects.

AUPress has shown strong interest in supporting a sustainable future for OER efforts in Alberta. University of Calgary is investing institutional funding to develop an OER Fellows program. Their leadership in these efforts would be valuable.

3. Centralized coordination of OER efforts at the Ministry level is not the national standard. The Canada OER Network currently consists of government funded eCampusAlberta-equivalents and institutional representation.

Support for Alberta OER Repository will end July 2017.

Continued funding for the Alberta OER Repository is included in Funding Scenarios outlined in Section 2 (\$20,000 per year).

Alberta OER Repository infrastructure and support for use is managed by University of Alberta, Faculty of Education.

Opportunity

Continue funding to encourage use and awareness of OER. Support adding more resources and cyclical updates from content creators including copy-editing and author consultation.

With further operational funding, the repository's sustainability can be further planned including source in-kind hosting. Provincial Library consultation will also ensure provincial opportunities and impacts are well-considered.

Expand the Alberta OER Repository to represent all OER. Currently, the collection is limited to feature resources funded by ABOER.

Considerations

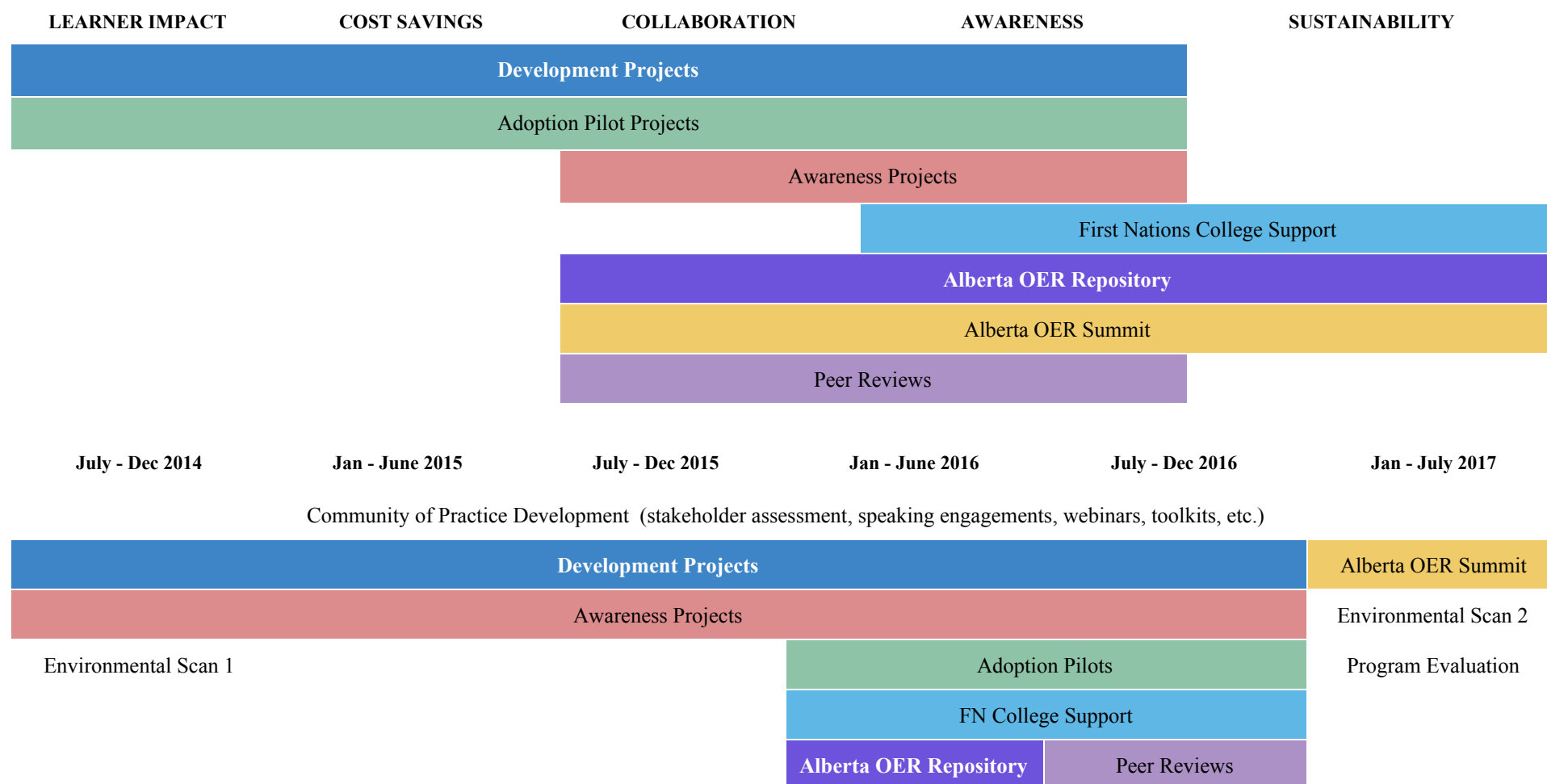
Without further investment, the repository will become an archive of the initiative.

Active provincial OER repositories are a key indication to institutions of the provincial dedication to OER. Nationally, every province with a central effort for OER has a provincial repository.

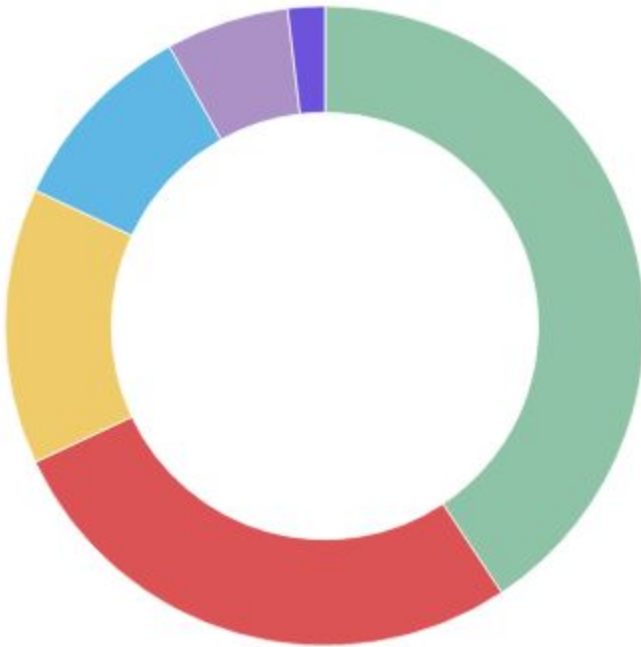
PROGRAM OVERVIEW

The Campus Alberta Open Educational Resources (OER) Initiative is designed to assist with reducing the costs of post-secondary education for students and provide students and faculty members with the flexibility they need; offering updated, relevant content for learning. Freely available online OER opens up unlimited access to quality international educational content.

This section of the report will evaluate the outcomes of the Campus ABOER Initiative and efforts of ABOER funded projects. The colors in the charts below match the first chart on page 2, “Funding Distribution by Project Type”. Content in the timeline below without color-coding reflects work by the Alberta OER Team within the 12% administration budget.

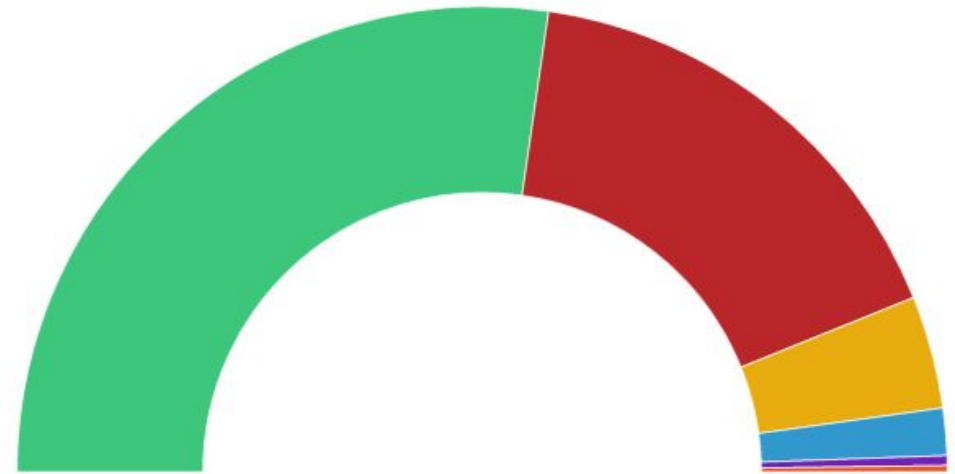


FUNDING DISTRIBUTION



Distribution of Funding by Project Type

Development Projects	\$1,277,537.62	72.6%
Adoption Pilot Projects	\$196,296.95	11.2%
Awareness Initiatives	\$131,832.85	6.6%
Alberta OER Summit	\$67,347.58	3.8%
Alberta OER Repository	\$47,985.00	2.7%
First Nations College Support	\$30,000.00	1.7%
Peer Reviews	\$9,000.00	0.5%



Distribution of Funding by Institutional Type

Comprehensive Academic and Research Institutions	\$888,938.19	54.0%
Comprehensive Community Institutions	\$536,020.80	32.6%
First Nations Colleges	\$144,400.00	8.8%
Baccalaureate and Applied Studies Institutions	\$55,208.43	3.4%
Polytechnical Institutions	\$13,000.00	0.8%
Independent Academic Institutions	\$7,100.00	0.4%

Total Funding Distribution: \$1.76M

OUTCOMES BASED EVALUATION

Development, use and, assessment of open educational resources

Foster awareness and use of open educational resources as a strategy for reducing student costs related to textbook purchases

- ABOER projects (6.6%, \$131,832.85) had primary objectives of raising awareness of open educational resources
- Awareness efforts included open online webinars, conference presentations, education consultations and toolkit collaborations
- Alberta OER Summit will follow 3 other institutionally-led ABOER-funded events drawing provincial attendance 2016-2017
- \$30,000 (1.7%) allocated to First Nations College Support resulted in increased institutional capacity to develop and use OER

Fund pilot projects related to selecting, adapting, using and evaluating open educational resources in post-secondary classrooms

- ABOER projects (83.3%, \$1,473,834.57) had primary objectives of reducing student costs by integrating OER in courses
- Projects funded include OER Development Projects (17), OER Adoption Pilots (21), Awareness Initiatives (6), Peer Reviews (18), and First Nations College Support.

Explore the use of open licensing frameworks such as Creative Commons, in the development of open educational resources

- All projects funded by ABOER required the use of open licensing; CC-BY or CC-BY-SA
- All content published and/or shared by ABOER has been CC-BY licensed
- ABOER Starter Kit, accompanying webinar, and ABOER resources page include how-to support on open licensing

Support capacity development for the sustainable development of quality learning materials

- Capacity building became a stronger focus in Phase II project awards and the efforts of the Alberta OER team
- Community of Practice led to a working committee to contribute to program evaluation and planning of Alberta OER Summit
- Adoption Pilot projects (11.2%, \$196,296.95), included an allocation of 25% capacity development funding per project
- First Nations College Support (1.7%, \$30,000) efforts supported capacity building

Foster strategic partnerships within Alberta and with other jurisdictions for the innovative development, use and assessment of open educational resources

- Counsel from BCcampus throughout initiative lifespan has allowed for growth in strategic maturity in the Alberta OER team
- Canada OER monthly calls led to collaboration and information sharing among provinces and national project opportunities
- Funding (1.7%, \$30,000) was allocated for First Nations College Support model with Alberta First Nations Colleges
- Awards deliberation processes actively sought collaborative opportunities in funding applications to support growth of the Alberta OER community; connecting past project leads with applicants, etc.
- OER Development and Adoption Pilot projects resulted in collaborative projects among institutions

Support communities of practice on open educational resources	<ul style="list-style-type: none"> • Alberta OER Community of Practice actively draws faculty engagement across Alberta • Planning the Alberta OER Summit is supported by a planning committee including 18 representatives from across Campus Alberta and First Nations Colleges • Program Evaluation conducted with a working committee sourced from the Alberta OER Community of Practice
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Activities which enhance the long-term impact of the Minister's investment and the sustainability of the open educational resources movement.

Managing a peer review granting program	<ul style="list-style-type: none"> • Peer Reviews are published on the AlbertaOER.com website and shared with the OER creator • Peer Review Fund (0.5%, \$9,000) contributed to the assessment and published peer review of global OER • Peer Review program required Alberta OER team evaluation of peer review submissions prior to publication
Managing an adoption pilot granting program	<ul style="list-style-type: none"> • Adoption Pilot projects (11.2%, \$196,296.95), included an allocation of 25% capacity development funding per project
Establishing a repository for Alberta open educational resources, potentially in partnership with another jurisdiction	<ul style="list-style-type: none"> • Repository contract with BCcampus is in place from May 2016 - 2018 • Open resources developed through ABOER funding are published to the Alberta OER Repository collection • Copy-editing and coordination of upload by the Alberta OER team ensured accurate licensing and open access formatting • Repository contract also includes pilot for public submission of OER
Developing and releasing toolkits to support post-secondary institutions to build their capacity to implement and benefit from open educational resources	<ul style="list-style-type: none"> • ABOER Champions Toolkit and OER Starter Kit are published to the AlbertaOER.com website • Peer review and contribution of OER Toolkits are encouraged and actively sought • Toolkits continue to be presented by the Alberta OER team at various professional development events
Maintaining a website for public and stakeholder communication	<ul style="list-style-type: none"> • AlbertaOER.com includes Alberta OER Repository, Peer Reviews, Toolkits, webinars, and how-to resources • A revision to the website is drafted to heighten the online presence of the Alberta OER Community of Practice • Articles on each ABOER project have been published to the AlbertaOER.com website throughout the lifecycle of the initiative
Initiating an Alberta open educational resources community of practice	<ul style="list-style-type: none"> • Alberta OER Community of Practice, launched Sept 2016, actively draws faculty engagement from across Alberta with an objective of openly sharing knowledge and facilitating cross-institutional collaboration • Community of Practice members are actively engaged in the planning of the Alberta OER Summit (May 11, 2017) • Members also supported planning and research for Alberta OER Program Evaluation (Mar 31, 2017)

Left column items above are direct excerpts from the Campus Alberta OER Initiative Proposal; Schedule A, Alberta Advanced Education Grant Agreement dated March 31, 2016.

PROCESS BASED EVALUATION

During the program evaluation, the steering committee was interviewed one-on-one to collect feedback on the governance, management, and communications of the initiative. Below is a summary of themes raised in these interviews:

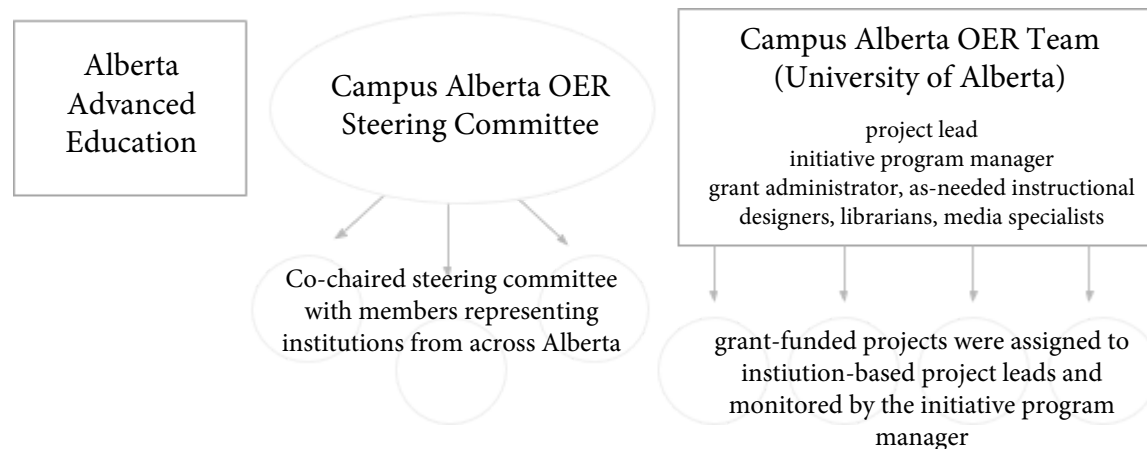
The application process allowed institutions of varied readiness to take action. The steering committee's decision to provide open call applications was considered a strength in assessing readiness and allowed stakeholder base transparency.

Olds College was convenient and hospitable. Gratitude for reduced travel was raised by each steering committee member.

Frequency of meetings was considered low. Steering committee members stated that discussions would have been richer with increased meetings. Comments were also raised that steering committee efforts between meetings were inconsistent with heavy reliance on the administrative team.

Roles of Ministry, Co-Chairs, and Alberta OER team were not well articulated. Although the structure was perceived to work, the definition of roles surrounding the steering committee was reported as 'not well understood' by steering committee members.

Program administration (Alberta OER team) was important to program success. Each steering committee member was consistent in their feedback that efforts of the Alberta OER team at University of Alberta to coordinate grant awards and community development was necessary to the accomplishments of the initiative.



More about the Alberta OER Team: Constant roles throughout the initiative were the project lead and program manager. The project lead, an Assistant Dean within University of Alberta, was key to ensuring the team had access to Campus Alberta stakeholder base and provided expert knowledge on OER to the Alberta OER team as they became a resource to the province. Guidance from an academic leader of this nature was vital to the program's efforts.

A dedicated program manager ("OER Coordinator") coordinated all aspects of the initiative from initiation to conclusion. This role facilitated steering committee grant deliberations, monitored all funded project activity in adherence to approved scope, time, and budget, and provincial stakeholder relationships. The program

manager role grew into a consultative role to Campus Alberta institutions and First Nations Colleges on OER, developed open education toolkits (in collaboration with MRU Librarian), and presents on OER championship at provincial conferences. This role represents Alberta in the Canada OER network and will lead development of the Alberta OER Community of Practice. This role also provided support to First Nations Colleges by mentoring on the execution of OER projects.

Instructional designers provided educational consultation and copy-editing of OER while being available as a provincial support to ABOER project leads and First Nations Colleges (through the First Nations Colleges Support fund). Librarian support was in-kind from within the University of Alberta.

NATIONAL & PROVINCIAL LANDSCAPE

The following themes were derived from interviews with other provincial open education programs:

Centralized Support

BC, Manitoba and Ontario have established provincial efforts to support OER and open education practices.

This central effort is recognized as a necessity for consistent measure of cost recovery and quality.

Access to Teaching / Learning Supports and Peer Engagement

Whether open education efforts continue in a central or decentralized model, ensuring local access to teaching and learning resources is a priority for successful development and adoption of OER.

OER vs Open Education Practices

Provincial OER efforts report a shift from stakeholder discussions of open textbooks and content in early stages to topics of open education and pedagogy. This aligns with the structure of centralized efforts where access to education is core to the mandate of other service lines. This shift is representative in Alberta OER stakeholders as well.

Government Endorsement

BC and Ontario stated strong ties of success to public and reinforced government endorsement. This includes both funding and public recognition.

The dissolution of eCampus Alberta has been perceived as a lack of government support of mandates such as accessibility and openness of education provincially and nationally.

ALBERTA PERSPECTIVE

The themes above directly align with challenges faced at a provincial level due to the disruption of eCampus Alberta.

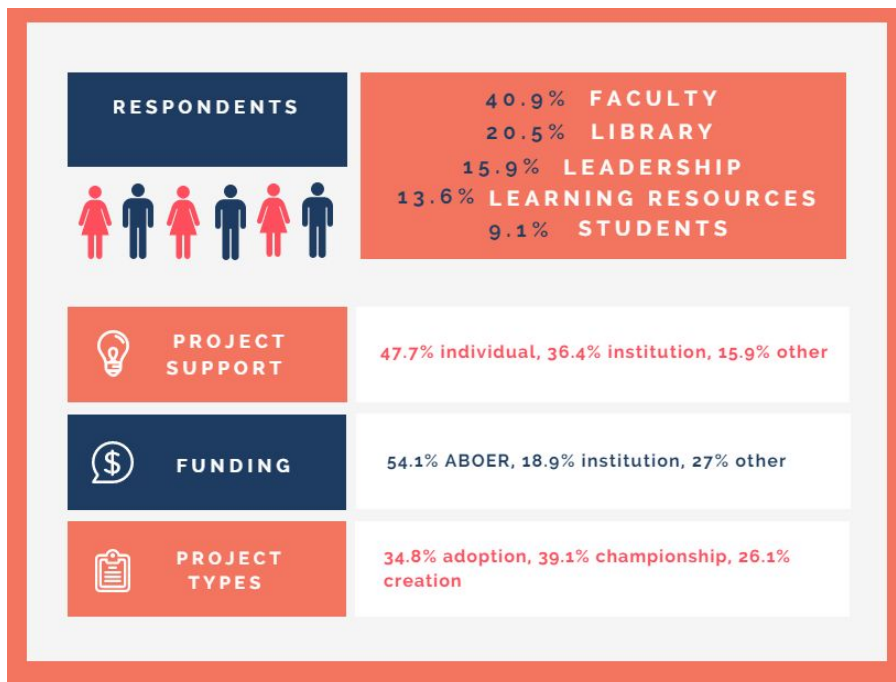
If the province decides to move forward without a mandate for centralized OER support, the sustainability of the Alberta OER Initiative accomplishments are at risk. Specifically, a lack of continued oversight of provincial OER efforts will be of negative impact to the forecasted return on investment of adoption pilots and established OER in the Alberta OER Repository. This also results in a lack of sustainability of the Alberta OER Repository and the newly forming Community of Practice. Maintaining provincial regulation will result in more focused efforts in the development and adoption of OER, Community of Practice, and ensure continued operations of the Alberta OER Repository. In addition, award funding in a system-wide manner is now a possibility with maturity of provincial engagement resulting from previous OER funding.

Due to the dissolution of eCampus Alberta, it is unlikely that the post secondary system will have capacity to absorb the responsibility to sustain Alberta OER efforts with a holistic and provincial lens without additional funding and centralized OER support.

ALBERTA LANDSCAPE

In March 2017, a provincial survey was distributed to Campus Alberta institutions and Alberta First Nations Colleges to collect input on institution-funded OER activity. Responses have been summarized below:

“What drives you or your faculty to adopt OER?” When asked about the objectives of OER initiatives on their campus and what drives faculty to adopt OER, more than half of the responses were student focused. The majority of these student centered responses reflected the desire to provide affordable options for students. Improving students’ education, student engagement, and improving distance learning were also mentioned. 11% of respondents indicated pressure from authorities in their institutions as a driving factor in adoption of OER. Other respondents discussed raising awareness for OER or the advantage of OER for creating flexibility with course materials.



“What’s next for your institution?” Respondents indicated that they will continue to raise awareness and create OER as they are able to. Many expressed that they are waiting to hear about more government funding, support, or to receive guidance on a clear coordinated approach to OER development. Several mentioned that they hoped to develop or find a group of people with the same vision to work with on OER awareness and development.

“What incentives do you believe would further the OER movement in Alberta?” The majority of responses centered around government involvement and providing faculty and institutions financial incentive. Faculty express that incentives could include funded time and recognition for OER projects. Many people responding to this question stated that there was still the need to develop awareness around OER and that support from the province or a central authority on OER is needed.

“Those who use OERs do it because they care about their students and want to make sure their learning experience is the best it can be. That includes saving them money and increasing accessibility”

OPPORTUNITIES

Engage students in OER initiatives

Engage administration to promote OER and integrate OER into tenure and evaluation

Engage faculty to contribute to OER and to peer review OER

LIMITATIONS / BARRIERS

Institutional support to adopt or create OER is variable

Provincial centralized authority is temporary (Alberta OER concludes July 2017)

Inconsistency across institutions on faculty recognition for creating/ adopting OER

NATIONAL LANDSCAPE

A review of open education initiatives across Canada was conducted with active participants of the Canada OER network including Saskatchewan, British Columbia, Manitoba, and Ontario. Activity and operating models are outlined below.

The Canada OER network holds monthly nationwide teleconferences with each province. Currently, Alberta's provincial efforts are represented by the Campus Alberta OER program manager. These calls have led to collaborations and mentorships across provinces. This network has expanded in the past year. In January 2016, representation included British Columbia, Manitoba, and Alberta. As of March 2017, representation includes British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Prince Edward Island, Creative Commons Canada, and SPARC (Scholarly Publishing and Academic Resources Coalition).

Alberta is currently viewed as a Canadian leader in open education, following British Columbia. All provinces explored below lead OER initiatives funded with government funding.

BRITISH COLUMBIA

BCcampus via Simon Fraser Government Funding	<p>Leading open education in Canada.</p> <p>BCcampus has 22 core operational staff including 3 staff dedicated to open education which is one of three service lines.</p> <p>The centralized efforts BC has modeled have been recognized across Canada for their ability to build institutional capacity, empower open education champions, and support skill development.</p>	<p>Projects include:</p> <ul style="list-style-type: none"> - Institutional workshops on adoption (train the trainer) - Institutional incentive program including funding for release time for both OER development and minor open textbook adaptations - Fund reviews of open textbooks in BCcampus collection - 5th annual Open Textbook Summit May 24-25, 2017 - Three Communities of Practice related to open education - Faculty Fellows program
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SASKATCHEWAN

Institutional-based University of Saskatchewan Government Funding	Saskatchewan's OER efforts are decentralized with funding distributed to University of Saskatchewan (UofS), University of Regina (UofR), and Saskatchewan Polytechnic.	<ul style="list-style-type: none"> - OER Fund: production, adaptation and/or use of OER - UofS reached 4,000 students over 3 years with steady growth UofS 2,700 students currently using open textbooks - UofR Press Open Textbook Publishing Program launched March 2016 to develop OER for 1st and 2nd year courses (5 in progress)
*activity at Saskatchewan Polytechnic not reported	The opportunity of University of Saskatchewan to rely on the Teaching and Learning Centre has been beneficial to establish a peer engagement model and mature the scope to "open textbooks" to "open pedagogy". University of Regina Press hired one program manager working with UofR stakeholders.	

MANITOBA

Campus Manitoba via
Brandon University
Government Funding

Campus Manitoba has 8 staff and open education is one of its service lines. Two staff members are responsible for open education efforts; a project coordinator and an OER generalist.

Campus Manitoba existing structure allowed them to facilitate faculty-based engagement across the province to conduct an “open education roadshow”. Their promotion strategy has relied on peer review honorariums.

- Peer Reviews, \$250 honorarium to review OER from repository
- ‘Report an Adoption’ on openmb.ca (voluntary, no incentives)
- OER roadshow, grassroots engagement with institutions
- Renewal of MOU with BCcampus (June)
- Next steps are: continue with Peer Reviews, continue guiding faculty on their adoption projects; OER creation/adaptation projects dependent on future funding

ONTARIO

eCampus Ontario
Centralized, not-for-profit,
Government Funding

eCampus Ontario has 11 core operational staff with open education as one of its service lines. Staff share the efforts dedicated to open education. Four faculty members will join the eCampus Ontario team in April as the front face of the open education initiative.

- Content development fund, 25 projects to date
- Majority of funded projects include institutional partnerships
- Provincial summit (March 2017)
- Investing in provincial open publishing infrastructure and importing the BCcampus Open Textbook Library
- Expecting further government support for open resource reviews, adoptions, adaptations and the creation of new materials

ALBERTA

Alberta OER
Centralized via UAlberta
Government Funding

Throughout the duration of the Campus Alberta OER Initiative, the staffing structure has included a dedicated part-time program manager, and as-needed support from librarians, instructional designers, educational developers, programmers, and media specialists.

- 17 OERs developed (textbooks, media, assessments)
- 21 Adoption Pilot projects resulted in 41 OER course pilots
- 6,000 students confirmed using open textbooks / open resources
- Peer Review program open to any OER (18 of 27 awarded)
- Community of Practice in development (April to July 2017)
- Provincial Summit with satellite locations (May 11, 2017)

UBC tenure and promotion process now includes OER practices in the Educational Leadership stream of the tenure and promotion process.

"Contributions to the practice and theory of teaching and learning literature, including publications in peer-reviewed and professional journals, conference publications, book chapters, textbooks and open education repositories / resources."

Table 1: Adoption Pilot Projects, Fall 2016

Original Text Costs		Fall 2016	Cost Savings			Institution	Course Impact			
Pre	Post	Enrolment	Realized (1 term)	Forecast (1 yr)	Forecast (5 yrs)					
\$89.00	\$0.00	240	\$10,680.00	\$21,360.00	\$117,480.00	Mount Royal University (MRU)	MGMT 2262			
\$70.00	\$0.00	140	\$4,900.00	\$9,800.00	\$53,900.00	Concordia University (CUE)	PESS 293			
\$100.00	\$0.00	260	\$13,000.00	\$26,000.00	\$143,000.00	NorQuest College (NQ)	CBL 5			
\$200.00	\$0.00	700	\$70,000.00	\$140,000.00	\$770,000.00	Mount Royal University (MRU)	CHEM 350	CHEM 360		
\$0.55	\$0.00	216	\$59.40	\$118.80	\$653.40	Athabasca University (AU)	BIOL 235			
\$72.00	\$0.00	694	\$24,984.00	\$49,968.00	\$274,824.00	Athabasca University (AU)	PHYS 200			
\$100.00	\$0.00	230	\$11,500.00	\$23,000.00	\$126,500.00	Bow Valley College (BVC)	LINC 6			
\$200.00	\$0.00	400	\$40,000.00	\$80,000.00	\$440,000.00	Athabasca University (AU)	CHEM 301			
\$183.64	\$0.00	250	\$0.00	\$45,910.00	\$229,550.00	Athabasca University (AU)	CHEM 350	CHEM 360		
\$90.00	\$0.00	450	\$20,250.00	\$40,500.00	\$222,750.00	Olds College	COM 1020			
\$117.64	\$0.00	200	\$11,764.00	\$23,528.00	\$129,404.00	Athabasca University (AU)	MATH 265			
\$265.00	\$0.00	120	\$15,900.00	\$31,800.00	\$174,900.00	Athabasca University	MHST 623			
\$140.47	\$0.00	200	\$14,047.00	\$28,094.00	\$154,517.00	University of Calgary	STAT 205			
\$120.00	\$0.00	58	\$3,480.00	\$6,960.00	\$38,280.00	University of Calgary	SPAN 201			
\$200.00	\$0.00	44	\$4,400.00	\$8,800.00	\$48,400.00	Maskwacis Cultural College	EDPY1500			
\$91.96	\$0.00	58	\$2,666.84	\$5,333.68	\$29,335.24	University nuhelot'įne thaiyots'į istameyimâkanak Blue Quills	COMM 200 COMP 125	ENG 200	PSYC 101	SOCI 100
\$207.95	\$0.00	90	\$9,357.75	\$18,715.50	\$102,935.25	Southern Alberta Institute of Technology (SAIT)	MATH 206 CHEM 181	CHEM 182	PHYS 181	PHYS 182
\$110.00	\$0.00	130	\$7,150.00	\$14,300.00	\$78,650.00	Medicine Hat College (MHC)	MICO 191			
\$0.00	\$0.00	40	\$0.00	\$0.00	\$0.00	Medicine Hat College (MHC)	CMMB 250			
\$500.00	\$0.00	280	\$70,000.00	\$140,000.00	\$770,000.00	University of Calgary (UofC)	GLGY401 GLGY441 GLGY503	GLGY505 GLGY601 GLGY603	GLGY605 GLGY609 GLGY611	GLGY639 GLGY663
\$40.00	\$0.00	7,406	\$148,120.00	\$296,240.00	\$1,629,320.00	Athabasca University (AU)	ENGL 255			

Original Text Cost Enrolment Realized Fall 2016 Projected 1 year Projected 5 years *Note: numerous adoption pilots reported institutional cost savings in addition to or instead of student savings*
\$2,898.21 **11,956** **\$482,258.99** **\$1,010,427.98** **\$5,534,398.89** *Cost savings in Table 1 represents a sum of both institution and student saving opportunities.*

Table 2: Sampling of OER Development Projects, 2015

		Annual 2016	Cost Savings Forecast		Cost of OER Development	Institution / OER Title	Courses	
Pre	Post	Enrolment	1 year	5 years			Forecasted	Other
\$230.00	\$0.00	180	\$41,400.00	\$207,000.00	\$54,000.00	University of Alberta, Mount Royal University Open Genetics Textbook + Digital Exercises	BIOL2101	Molecular BIO 2202, Principles Ecology and Evolution 2213, Molecular Genetics 3103, Intermediate Cell Bio 3102, Evolutionary Bio 3106
\$70.00	\$0.00	479	\$33,530.00	\$167,650.00	\$15,000.00	Creative Clinical Teaching in Health Professions: Open Access Textbook	MHST 623 MHST 624	MHST 625 Personalizing Learning Through Collaborating and Mentoring in Health Care Environments
\$125.00	\$0.00	680	\$85,000.00	\$425,000.00	\$50,000.00	OER Textbook on Occupational Health and Safety	IDRL308 HRMT232	
\$166.00	\$0.00	177	\$29,369.00	\$146,844.00	\$60,000.00	Course Redesign: Health and Community Development	HADM315 HADM326	HADM 3XX: Health Communication
\$185.00	\$0.00	434	\$80,290.00	\$401,450.00	\$121,000.00	Beginner Spanish OER	SPAN 200 SPAN 201	1st semester Spanish courses Partial use in 2nd and 3rd years
\$775.93		1,950	\$269,588.73	\$1,347,943.63	\$300,000.00			

*To provide a clear sampling of cost recovery related to OER development (above), 10 OER development projects were removed (listed below)

Institution	OER Title	OER Development funded by ABOER	
University of Alberta	OER Interactive Physics Simulations	\$80,501.00	
Olds College	Workplace Communications Open Curriculum	\$200,000.00	
Athabasca University	Intermediate Financial Accounting I and II OER Tutorial	\$20,000.00	
Medicine Hat College	Microbiology Textbook / CMMB 250 Microbiology	\$21,473.85	
University of Calgary	Open Logic Textbook	\$43,000.00	
Bow Valley College	Improving Reading Skills for Success in Postsecondary Education	\$64,800.00	
University of Calgary, Mount Royal University	OER for Introductory Mathematics Courses	\$39,623.19	
Bow Valley College, NorQuest College	In the Workplace: An Intermediate Integrated Skills Textbook	\$200,000.00	ESL textbook
Athabasca University	Rocket Scientists' Guide to Money and the Economy	\$64,000.00	
Athabasca University	Building In-service Teacher OER Capacity for Graduate Credit	\$74,000.00	
Mount Royal University	Open Source Textbook in Applied Logistics Management	\$27,349.43	Partially funded; still in development
Athabasca University	Open Physical Geography Course	\$164,264.00	Partially funded; still in development

Table 3: Cost Recovery of Adoption Pilot Program

\$200,000 invested in Adoption Pilots will recover \$1.76M in 2 years	
ABOER grant funding	\$1,760,000.00
Savings forecasted over 5	\$5,534,398.89
Savings forecasted per year	\$1,010,427.98
\$1.76M divided by savings per year	1.7418361673