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# CAPSTONE FINAL REPORT

OPEN EDUCATION LEADERSHIP PROGRAM

**SPARC\***

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## OER Readiness and Environmental Scan of Departments with High-Enrollment Courses

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# Abstract

For my SPARC OER Fellowship capstone project I conducted an open educational resources (OER) readiness and environmental scan of three departments with the high enrollment courses (HEC) to gather data about current practices, structures, policies, attitudes and course material usage to determine which departments would most likely switch to OER or low-cost alternatives.

For this scan, I developed a methodology that includes collecting data from departments with HECs by conducting a textbook listening tour, small group interviews and gathering university data to determine which program/courses will most likely convert a course. The methodology developed relies on a deep listening approach for conducting a textbook listening tour. Deep listening “is a way of hearing in which we are fully present with what is happening in the moment without trying to control it or judge it.” This methodology allows for the listener to hear the intention of the speaker, and actively listen in an empathetic supportive manner that builds trust.

Adapting an existing listening tour question base, I divided the listening tour meetings into two separate discussions. The first meeting employed a deep listening approach for the discussion of the current textbook use and department practices. At the follow-up meeting, the discussion introduced options for “getting to affordable” based on what was learned and what was heard about the department’s needs and values. The listening tour data was used to immediately address low hanging fruit that arose during the discussion such as; creating a course affordability tips faculty handout and adding an iclicker collection to library reserves. The data gathered supported the campus affordable course materials initiative which launched during this time. The full environmental scan methodology was developed into a community resource using a publicly accessible Google document linked via SPARC’s OER Fellowship program webpages and deposited in Oakland University’s institutional repository, OUR@Oakland.

# Project Overview

In March 2018, the Oakland University (OU) Faculty Senate passed a motion in support of an affordable textbook initiative. *“To encourage faculty members to use quality, affordable textbook alternatives, such as Open Educational Resources (OER), when available, and to encourage the university to develop an affordable textbook initiative that would provide incentives and institutional support.”* In April 2018, OU Student Congress passed a motion supporting OER and presented it to the Board of Trustees. OU Libraries submitted a campus plan for phase 1 of an Affordable Textbook Initiative to the Provost in November 2018, and in December 2018 he endorsed the plan. In February 2019, OU Libraries announced the launch of the Initiative to Faculty Senate, secured funding from the Provost office and formed the Affordable Course Materials Initiative Team (ACMI) Team.

My capstone project was to conduct a comprehensive Open Educational Resources (OER) readiness and environmental scan of 3-5 departments with high enrollment courses (HEC) to gather data about current practices, structures, policies, attitudes, and course material usage to determine which departments would most likely switch to OER or low-cost alternatives. The project was intended to position the university to begin implementing the Affordable Course Materials Initiative and build a network of allies, supporters and collaborators on the campus. Naively, I assumed there already were available materials for how to conduct an OER environmental scan (ES) that I could adapt for my institution. While current ES literature exists, primarily the articles are published in business literature. There is little discussion of ES in library literature. Castiglione’s 2008 article *“Environmental scanning: an essential tool for twenty-first-century librarianship”* provides some structure for how libraries can use ES in library work. Castiglione suggests starting by “developing a list of critical variables that require continuous evaluation” and creating “a list of information sources that provide the required coverage of all the critical variables” (p. 534).

## **Data Gathering**

Based on Castiglione’s (2008) structure, I obtained enrollments data from the most recent year possible and selected criteria for determining what was a high enrollment course. My threshold was an enrollment of 100 students in all sections combined. Next, required textbook data with the cost for new textbooks was gathered through the bookstore website. Materials for all sections were gathered and compared. In some cases, the required materials varied slightly so a range of cost was reported.

Course	Enrollment	Course materials \$	1 semester	1 yr w/o summer	5 yr w/o summer
BIO 1200	1055	\$157.15	\$165,793.25	\$331,586.50	\$1,657,933
CHM 1040	645	\$387.40	\$249,873.00	\$499,746.00	\$2,498,730
SPN 1140	688	\$273.00	\$187,824.00	\$375,648.00	\$1,878,240
PSY 1000	603	\$125.00	\$75,375.00	\$150,750.00	\$753,750
HS 2000	488	\$224.85	\$109,726.80	\$219,452.60	\$1,097,268
SOC 1000	234	\$117-156.40	\$27,378-26,567	\$54,756-73,194	\$273,78-365,970
ECN	522	\$250-301.10	\$130,500-157,122	\$261,000-314,244	\$1,080,000-1,571,220

*\*Numbers are based on 17-18 data assuming all students purchase new from bookstore.*

For the textbook listening tour interviews, I choose to focus only on general education courses within the College of Arts and Sciences. This determination was made for several reasons: the College of Arts and Sciences contained the majority of the high enrollment courses; the Dean of Arts and Sciences is a supporter of OER and the affordable initiative; I had presented to the College of Arts and Sciences Chairs and Department Heads meeting the previous year; I had many personal connections within the school that would provide leverage for arranging meetings with faculty groups.

## **Building Support**

### *In the Library*

My capstone project was designed to directly support the campus affordability initiative. To build support amongst librarians for the campus initiative and solicit volunteers to assist with my capstone project work, I presented to the library faculty at a Faculty Assembly meeting. Adapting a presentation by Kristin Miller Woodward and Amanda Larson on OER & the ACRL Framework from the OpenED18 conference, I created a handout to demonstrate that assisting faculty with locating affordable materials is aligned with the current work we do as liaisons. Using the ACRL Framework as bridge to connect OER was intended to be a path for librarians to make the connection between their current work and assisting faculty with OER discovery for their courses.

### *On campus*

I met with the Dean of Arts and Sciences to discuss my capstone project, the process, to get advice and support. The Dean offered to be included on the emails to the departments, provided information about targeted courses and departments and made recommendations about with whom to meet. I also reached out to Department Chairs to assist with organizing the meetings with the most relevant groups of faculty. Having the Dean of the School included in the communication to the Chairs and faculty members provided additional weight and importance to the project.

### **Listening tour methodology**

I became aware of textbook listening tours as a methodology from attending a presentation at OpenEd18 conference presented by Annie Johnson and Steven Bell titled: “*We’re Listening: A Textbook Listening Tour to Promote OER Adoption.*” I was able to adapt their questions but still needed a structure for how to conduct the actual meetings.

The theoretical framework used for the listening tour drew from focus group procedures combined with deep listening theory. Questions were edited to be specific to the organization and objective of the listening tour and structured based on *Focus Group Fundamentals Iowa State U Extension Methodology brief* (Grudens-Schuck, Allen, & Larson, 2004) and Krueger, & Casey (2002):

- Focus groups are naturalistic
- Researcher listens not only for the content of discussions but for emotions, ironies, contradictions, and tensions.
- Learn or confirm not just facts, but meaning behind the facts
- Questions invite openness and avoid bias
- Reporting on patterns and themes or perspectives
- Shared control - allow for spontaneous, unexpected elements
- Use open-ended questions
- Use different types of questions
- Use questions that get participants involved
- Good sequence goes from general to specific
- Summarize and reflect back - “is this an adequate summary”

The deep listening methodology requires the facilitator to actively listen but not comment or try to troubleshoot. Deep listening is similar to active listening methods which are part of mindfulness practices. “*Deep Listening involves listening, from a deep, receptive, and caring place in oneself, to deeper and often subtler levels of meaning and intention in the other person. It is listening that is generous, empathic, supportive, accurate, and trusting*” (Rome, 2010).

The listening tour was planned as two separate meetings. The initial meeting was to learn about what faculty are currently doing and the follow-up meeting was to discuss affordable options.

The first meeting started with a short introduction about the library leading a campus course affordability initiative, the data gathering goals of the listening tour and defining deep listening methodology. The objective was to establish the library as a supportive campus partner in achieving faculty or department goals. Meetings were recorded to help facilitate the deep listening approach and allow me to be fully present in the conversation.

After the meeting and reviewing the recording, a notes document was compiled grouping comments into categories. The notes were generalized and no names were included. The categories shifted somewhat depending on the how the conversations progressed. Comment categories include: current textbook, online components, selection, teaching, students, other.

On the notes document these categories were then placed into the follow headings:

- What was learned
  - Basic facts - which textbook is used, price, how it is selected, how often replaced, what they communicate to students
- What was heard
  - The meaning behind the comments about the textbook, affordability, concerns, what they value, insights into department culture.

A second meeting was scheduled to reflect back what was learned and heard and present information about OER based on the groups' knowledge, to discuss transitioning to affordable options and clarify concerns or questions.

Two departments preferred having the second meeting combined with the first, which did not allow an opportunity to find out answers to questions that came up in the first discussion. It was more challenging to immediately reflect back without listening to the recording. For these meetings, I took more written notes during the discussion. I focused on comments pertaining to their values and concerns, so I could immediately reflect these back. After the meeting, I did additional follow-up through email. Using the recording, I documented the extent of what I learned and answered any questions that arose. I also came to the meeting prepared with general knowledge of what OER and affordable resources are currently available for the course/subject we were discussing.

### **Reporting back**

The listening tour meetings generated data about department practices for selecting, reviewing adopting and usage of course materials. This data informed the campus ACMI Team about the complexities of course material selection, adoption and usage for large enrollment multi-section courses at OU. There were similarities across departments regarding usage of online textbook course materials, use of adaptive learning technology and departments directly negotiating with publishers. Faculty from different departments also shared similar concerns and held similar misconceptions.

A letter acting as a final report was sent to participants, thanking them for their participation, detailing the work of the ACMI Team, encouraging further discussion about affordability, informing them of the upcoming grants program and the launch of an affordability pledge campaign. A copy of the compiled notes was attached along with an affordability strategies tip sheet. Report letters were cc'd to the Dean of Arts and Sciences and Department Chairs.

# Evaluation

There were 4 goals stated in my capstone project plan as [evaluation measures](#) to inform success. Some success was achieved in each goal category. However, the converting of a high enrollment course, which was a stated goal, proved to be a much more complicated process. All departments did agree to consider affordable options next time they are choosing a new textbook for the targeted large enrollment course.

The final project has an overall score of 14. A score of 4 on an individual goal represents complete success, a score of 1 represents a lack of success. The highest possible total score is 16.

**Goal 1** Gather data from 3-5 departments with the high enrollment courses (HEC) by conducting a textbook listening tour, small group interviews and data collection to determine which program/courses will most likely convert a course.

**Rubric Score 4**

*Data gathered through the listening tour meetings and interviews from 3-5 departments with the top HEC.*

**Results:** Meetings were conducted with three separate departments.

**Goal 2** Determine how the program and course structure, how they choose their books, whether they rely on publisher materials and online grading and their internal culture for accepting change will affect readiness to convert.

**Rubric Score 3**

*Methodology yielded sufficient data about the departments and faculty use of course materials to begin to provide adequate support to programs and faculty.*

**Results:** Data gathered supplied rich information not previously known about HEC structure.

**Goal 3** Build allies, supporters, collaborators for working on campus initiative.

**Rubric Score 3**

*1-2 faculty agree to a plan to convert a course and advocate for change in the department.*

**Results:** One faculty member inquired about an open textbook for a different course after the listening tour meeting. I was able to easily locate one and she plans to adopt it for her summer course. Another faculty member in a different department agreed to coordinate with the library about making his required reading texts available through the library as multiple use license ebooks. Nearly all faculty that participated were supportive of the initiative and considering affordable options in the future.

**Goal 4** Capstone work positions university to begin implementing the Affordable Course Materials Initiative plan.

**Rubric Score 4**

*Project work had a high-level of impact on the direction of the campus Affordable Course Materials Initiative.*

**Results:** The data gathered enlightened and informed the ACMI Team's work and the project brought recognition from the administration to the Affordable Initiative. The Provost Office has agreed to assist with recruiting faculty to join the ACMI Team.

## Lessons Learned

### **Data Gathering**

Gathering data about courses and textbook cost seems straight-forwarded but inevitably is not. There is bound to be discrepancies between the available data, actual cost, use and perceptions of faculty. Further, when presented with hard numbers, faculty focus on the numbers and not the larger picture. The data I gathered was slightly misaligned in that the enrollment data was from 2017-18 and the textbook data was from Fall 2018. Also, I only utilized prices for the cost of new textbooks as displayed through the bookstore. I noted this on the charts that were made available with the following statement: *\*Numbers are based on 17-18 data assuming all students purchase new from bookstore.* I attempted to communicate that the charts provided were suggestive rather than representative of actual prices and expenses. Some faculty really zeroed in on the price of the textbook listed, feeling defensive and needing to either justify or correct the data. In most cases the claim was that the price is cheaper if student purchased directly through the publisher. Other faculty understood the purpose of the chart and were more resigned to explain that the cost can vary depending on how students purchase the textbook, displayed confidence that they provide sufficient options and/or the cost isn't that high.

### **Building Support**

#### *In the library*

The presentation to the library faculty was designed to build support amongst librarians for the library leading the campus initiative and to connect OER with their liaison work. Reworking Kristin Miller Woodward and Amanda Larson's OER and the Framework content greatly reduced the mental labor even though I ended up utilizing only a small portion of their work. The presentation did result in several librarians offering to attend listening tour meetings with their departments but because of schedules, they did not end up attending. In the end, this was probably for the better. The methodology of deep listening emphasizes listening without judgment. The liaison is someone with whom the faculty have an established relationship. My intention for inviting them was to purposely not exclude them, to tap into their background knowledge and to have them assist with access. However, if the liaisons were present, participants may have held back on their comments pertaining to what they knew related to available library resources and support. It also may have been more challenging for the liaison



librarian not to correct misconceptions or problem shoot issues when faculty brought them up in the discussion. I was able to conduct the meeting as a neutral person, who approached the discussions with no background or history of their relationship to the library or bookstore. Also, having two librarians present at smaller meetings may have overwhelmed the dynamics. Presenting to the library faculty about the project and using the ACRL Framework as a bridge to connect current liaison work to OER discovery was a key step in getting liaison librarians onboard.

### *On campus*

Having the support of the Dean of Arts and Sciences was hugely important. The meeting with him prior to launching the tour supported the project's legitimacy and provided valuable insight. The support of other administrators on campus built through individual relationships and during the constituency meetings conducted in the fall were also instrumental in establishing me as a leader of this initiative and promoting the work of my capstone project. Further, the importance of my faculty rank and my personal contacts on campus from having a decade of work history at OU was invaluable. I have built a broad network of colleagues and friends and established my reputation as a competent librarian and fellow faculty member. It was these relationships that got me in the door. In places where I didn't have these connections, I was not successful in securing a meeting. While, I don't think it was the only factor that inhibited success, it most certainly contributed.

### **Listening Tour faculty meetings**

Building a framework by reading literature on case study methodology and incorporating the deep listening theory grounded the work of the textbook listening tour sessions. Even though the questions and format were altered, starting from the list of questions used by the Temple University librarians reduced the mental work and anxiety about starting from scratch. Originally, I tried to schedule meetings with larger groups of faculty, such as all the faculty teaching a specific course. This only was possible for one department and after the meeting I realized this probably wasn't the most productive approach. The smaller meetings with 2-3 faculty yielded a much richer discussion and I was still able to witness the dynamics and cross-talk, which often were the most fruitful. These conversations are when I learned about misperceptions and faculty values. The larger group discussion displayed more of the departmental dynamics but often one person tended to speak more than others and the younger or untenured faculty deferred to tenured faculty. Recording the meetings to review later when drafting the notes was vital to capturing the discussion.

I was surprised to discover that universally faculty really don't trust or like the bookstore! This was information that has helped the affordability team and resulted in direct actions to correct some of the myths faculty hold. Faculty on campus are negotiating directly with the publisher believing they are getting the best deal for students by circumventing the bookstore. Why they would want to directly deal with vendors and why they feel qualified to do this remains unclear to me. Also, the question remains as to whether they can enter into agreements with publishers without including the university legal department.

Talking to faculty in small groups or individually is tremendously more informative and productive than sending out emails and surveys. Across campus, departments and faculty are doing what they can to serve their students in the best ways they see possible but there is no coordination of efforts. The silos of academia really were very clear. Faculty value the neutrality of the library and the expertise of librarians but haven't yet considered the library as being part of their support structure on campus to assist with textbook and course materials selection.

Ultimately, the listening tour discussions were a means for planting OER seeds. I believe these seeds will grow, quicker in some departments than others but are dependent on the level of tending that occurs. The question remains as to who will be the gardener and how the OER soil will continue to be tilled.

\*See [Appendix A](#) for specific notes from each department/faculty meeting.

\*See Community Resource-[Methodology for conducting an OER environmental scan of departments with high enrollment courses](#)

## References

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