Leveraging Open Educational Resources to Advance Diversity, Equity, and Inclusion

A Guide for Campus Change Agents

By C. Edward Watson, Lisa Petrides, Anastasia Karaglani, Selena Burns, and Judith Sebesta

Foreword by Lynn Pasquerella
Leveraging Open Educational Resources to Advance Diversity, Equity, and Inclusion: A Guide for Campus Change Agents is licensed under a Creative Commons Attribution 4.0 International License.

Please cite this guide as follows: Watson, C. E., Petrides, L., Karaglani, A., Burns, S., & Sebesta, J. (2023). Leveraging open educational resources to advance diversity, equity, and inclusion: A guide for campus change agents. American Association of Colleges and Universities (AAC&U) and Institute for the Study of Knowledge Management in Education (ISKME).
Contents

Foreword by Lynn Pasquerella ............................................................... vii
Acknowledgments ......................................................................................... ix
Introduction .................................................................................................. 1
A Guide for Campus Change Agents .......................................................... 7
  Domain #1: Institutions’ DEI-OER Goals .................................................. 7
  Domain #2: Digital Equity ........................................................................ 9
  Domain #3: Seven Strategies That Institutions Use to Connect Their OER Work to DEI ... 10
    Strategy #1: Engaging Multiple Institutional Partners .......................... 11
    Strategy #2: Developing Communication Strategies That Explicitly Connect DEI and OER .................................................. 14
    Strategy #3: Offering Professional Learning for Faculty and Leaders That Aligns with DEI and OER .................................................. 16
    Strategy #4: Using Data to Understand the Impact of DEI-OER Implementation .... 19
    Strategy #5: Building External Collaborations ....................................... 21
    Strategy #6: Embedding DEI into OER Course Redesign or Development Grant Programs ........................................................................ 23
    Strategy #7: Connecting DEI-OER with Institutional Mission Statements, Strategic Plans, and Internal Governance ...................................... 25
Conclusion .................................................................................................. 28
Appendix: Recommended Resources Supporting OER and DEI Work ............ 29
References .................................................................................................. 33
About the Authors .......................................................................................... 37
About AAC&U and ISKME ............................................................................ 39
Foreword

The worst global pandemic in more than a century created unprecedented disruption to every sector of society, including higher education. While colleges and universities around the world demonstrated remarkable resilience in the pivot to remote and online learning, campus closures had a profound effect on nearly all aspects of college operations—from admissions, residential life, financial aid, and work-study programs to staffing, modes of curriculum delivery, teaching, research, and assessment. At the same time, the pandemic unveiled and magnified the expansiveness of the digital divide and the food and shelter insecurities experienced by students across institutional types, alongside the burgeoning mental health needs of students whose anxiety was fueled by financial uncertainty, isolation, escalating racism, xenophobia targeting Asian Americans, and fear that they or their loved ones would contract the deadly virus. The disparately negative toll of the coronavirus on Black, Latinx, and Indigenous communities contributed to increased physical, psychological, and financial burdens for many students of color, who suffered the highest rates of dropout, particularly at community colleges and four-year public institutions (National Student Clearinghouse Research Center, 2022).

After tracking the global impact of COVID-19 in the ensuing two years, the United Nations Educational, Scientific and Cultural Organization (UNESCO) reported that

the pandemic has exposed multiple levels of inequalities that in higher education include differential treatment of students based on their background, closed access to knowledge and research results, unevenness in global patterns of research collaboration, and lack of access to the basic requirements of digitalized higher education such as devices, internet access, and electricity. (Abdrasheva et al., 2022, p. 54)

In addition to the pandemic's effect on more than 220 million college and university students worldwide, UNESCO now estimates that 24 million learners, from pre-primary to university-level students, are at risk of not returning to school. The prospect of a lost generation of students in the college and university pipeline adds to the urgency of addressing these stark inequities, which UNESCO insists “must be kept at the forefront as higher education begins to think ahead to create a more equitable post-pandemic world” (Abdrasheva et al., 2022, p. 54).

This guidebook is intended as a resource for colleges and universities to reimagine and revolutionize higher education in ways that address the equity imperative before us, serving as change agents by leveraging the power of open educational resources (OER) to advance diversity, equity, and inclusion (DEI) at each of our institutions. It makes clear that the integration of OER and DEI goals on campuses necessitates colleges and universities moving beyond a focus on expanded learning access and affordability to an emphasis on equitable student outcomes, the retention of underserved students, and an enhanced sense
of belonging among those whose perspectives have been excluded or marginalized within the curriculum. Indeed, by recognizing that students are more engaged in learning when they see themselves reflected in the course materials, the highlighted case studies invite the expansion of the curriculum through the incorporation of diverse voices, local epistemologies, and the inclusion of histories that have been erased from the dominant narrative. In the process, they demonstrate how OER can provide individualized curricula and learning experiences aimed at the democratization of knowledge production.

Among the authors’ primary objectives are to enhance faculty awareness of the many curricular innovations taking place at colleges and universities that include OER as a catalyst for DEI and to encourage administrators to invest in the faculty professional development needed to lead similar initiatives. These goals flow from AAC&U’s mission of advancing the democratic purposes of higher education by promoting equity, innovation, and excellence in liberal education. They are grounded in the belief that a twenty-first-century liberal education is characterized by educational experiences that empower students to be active participants and partners in their own education and in the education of others—encounters enriched by a diversity of backgrounds, identities, and viewpoints among students, faculty, and community members. Making equity a pervading focus of educational reform and designing and delivering educational experiences that support the success of all students in work, citizenship, and life are essential to realizing the vision of a strong, relevant, and inclusive liberal education. Rather than a return to normal, AAC&U is eager to collaborate with leaders at all levels as we embark on a shared endeavor of shaping a more equitable higher education landscape in a post-pandemic world.

Lynn Pasquerella  
*President, American Association of Colleges and Universities*
Acknowledgments

This guide is a product of research with specific institutions engaged in OER work with AAC&U. As such, it provides concrete, actionable DEI and OER integration strategies that are currently in use in institutions of higher education. Findings are limited by the scope of work in which participants engaged at the point when data were collected, and by the interpretive lenses of the researchers and guide authors. The authors wish to thank the participating teams in AAC&U’s 2021–2022 Institute on Open Educational Resources for their commitment to their students and their institutions, and for their willingness to share specifics of their work with us.

We are grateful to Jessica Chittum and Cynthia Jimes for their assistance and input as we designed and implemented key elements of our project, including research methodology. We are also grateful to Amy Davis for her expert editorial assistance and to Michele Stinson for her design expertise.

Finally, we acknowledge with deep gratitude the William and Flora Hewlett Foundation for providing financial support that enabled us to develop this guide. We also thank the leadership and staff members of the foundation for their continued advocacy for open educational resources and the outcomes they produce.
Introduction

This guide is designed to support the integration of open educational resources (OER) and diversity, equity, and inclusion (DEI) goals within higher education institutions. Built upon research funded by the William and Flora Hewlett Foundation that examined the strategies and experiences of the sixty-six colleges, universities, and state systems that participated in AAC&U’s year-long inaugural Institute on Open Educational Resources (2021–22), this guide provides evidence-based guidance and best practices that result in initiative sustainability and broad adoption of OER by strategically connecting this work to DEI goals, strategies, policies, initiatives, and offices that also exist within a given educational context. Indeed, OER and DEI initiatives often seek similar outcomes, and intentionally connecting such work ultimately serves to facilitate achievement of common goals. The current and emerging higher education landscape underscores the need for attainment of these goals.

Contemporary college students in the United States are more diverse than ever before. “Between 1996 and 2016, the non-White share of undergraduates grew from 29.6 percent to 45.2 percent, while the non-White share of graduate students grew from 20.8 percent to 32.0 percent” (Taylor et al., 2020, p. xviii). College students are more likely to be Black, Hispanic, or Native American than in previous decades. Additionally, 46 percent of today’s college students are first-generation, and more than two-thirds work to support themselves while in school (Lumina Foundation, n.d.). However, even as the US higher education student population becomes increasingly more racially, ethnically, and socioeconomically diverse, inequities persist in higher education enrollment, student debt, and outcomes, such as persistence/retention in degree programs generally and in STEM majors specifically (Cahalan et al., 2022; Fry & Funk, 2021). Particularly impacted by these inequities are American Indian/Alaska Native students, Black/African-American students, Hispanic/Latino students, first-generation students, and low-income students across all fields; and women in specific wage/high-demand STEM fields such as computer science and engineering (Cahalan et al., 2022; Fry & Funk, 2021). The multigenerational effects of slavery, colonialism, and structural racism have contributed to a heightened intersectional impact of race/ethnicity, education, economic, and gender inequities for Black and Indigenous students. For example, 85 percent of African American students graduate with student loan debt compared with between 45 percent and 69 percent of Asian, White, and Latino students (Lumina Foundation, n.d.), and African American women are disproportionately underrepresented in science and engineering professions (Charleston et al., 2014). While these problems have no single solution, it is clear why AAC&U and ISKME have identified advancing DEI as an urgent campus priority and why “campuses are accelerating efforts to promote evidence-based reforms.
to make their institutions more equitable and inclusive for all students” (AAC&U, n.d.a.). Centering DEI goals in institutional plans, programs, processes, and initiatives is critical to working toward a more socially just higher education system that results in more equitable outcomes for all students. OER initiatives are particularly well situated for synergistic advancement of DEI goals.

The OER domain contains and utilizes terminology that has specific meaning and nuance within its context, and this language evokes DEI as a core value associated with OER engagement. For instance, *open education* is typically defined as “the myriad of learning resources, teaching practices, and education policies that use the flexibility of OER to provide learners with high-quality educational experiences” (Hewlett Foundation, n.d., para. 4). OER are then teaching, learning, and research materials that are either a) in the public domain or b) licensed in a manner that provides everyone with free and perpetual permission to engage in the 5R activities—retaining, remixing, revising, reusing, and redistributing the resources. (Hewlett Foundation, n.d., para. 4)

Further, equity is broadly seen as an implicit value of OER (DOERS3, 2021b). High-quality, free, and accessible learning materials that can be adapted to be culturally relevant and responsive align with the fundamental value that education should be accessible to and inclusive of all learners. Moreover, as a pedagogical tool that supports collective authoring, publishing, and distribution of information, OER has the potential to support the democratization of knowledge production. This is particularly true when OER is used in concert with open

<table>
<thead>
<tr>
<th>Social Justice Principle</th>
<th>Open Education Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Redistributive Justice</strong></td>
<td>Free educational resources, textbooks, or courses to learners who, by circumstance of sociocultural position, cannot afford them, particularly learners who could be excluded from education or be more likely to fail due to lack of access to learning materials.</td>
</tr>
<tr>
<td><strong>Recognitive Justice</strong></td>
<td>Sociocultural diversity in the open curriculum. Inclusion of images, case studies, and knowledge of women, First Nations people, and whoever is marginalized in any particular national, regional, or learning context. Recognition of diverse views and experiences as legitimate within open assignments and feedback.</td>
</tr>
<tr>
<td><strong>Representational Justice</strong></td>
<td>Self-determination of marginalized people and groups to speak for themselves and not have their stories told by others. Co-construction of OER texts and resources about learners of color by learners of color, about women’s experiences by women, about LGBTQI+ experiences by LGBTQI+ identifying people. Facilitation to ensure that quiet and minority views have equal airtime in open online discussions.</td>
</tr>
</tbody>
</table>
pedagogy practices that empower students as knowledge creators. In the United States, where higher education has historically reinforced existing inequalities in who authors educational materials, who is represented in them, and who has access to them, the use of OER in college and university classrooms has the potential to be a positive, transformative force in some of the structural systems that continue to produce alienating environments, unequal outcomes, and differential degree acquisition for learners from historically marginalized populations. Lambert’s (2018) “Three Principles of Social Justice Applied to Open Education” articulates the ways that OER can support DEI goals and foundational principles (see Table 1).

While the broad potential of OER to contribute to equity in higher education has been acknowledged at many colleges and universities, much of the messaging and effort around OER continues to be dominated by a focus on student cost savings. Affordability is important to redistributive justice; Jenkins et al. (2020) found that while textbook costs serve as a barrier for the majority of students, they provide significantly more impact on racial/ethnic minority students, low-income students, and first-generation students. In addition, Colvard et al. (2018), Marsh et al. (2022), and Stanberry (2022) have examined ways in which no-cost OER course materials can contribute to more equitable student success outcomes.

While no-cost OER courses are inherently aligned with affordability as it relates to equity, institutional OER messaging does not always frame student cost savings as an equity issue, and even when it does, OER is not necessarily seen as an integral part of broader DEI efforts. Arguably, affordability is the easiest DEI principle for OER initiatives to be aligned with; however, the role of OER in recognitive and representational justice can be complicated by the fact that OER are not always diverse, inclusive, or accessible. This guide therefore seeks to broadly highlight who is doing the work in colleges and universities where the practice of OER is overtly rooted in and supportive of broader institutional DEI goals and social justice principles. In doing so, the authors intend for this guide to support OER change agents seeking actionable methods of strengthening the alignment between OER and DEI campus efforts. To provide further clarity regarding how we conceived of diversity, equity, and inclusion as we developed this guide, we provide the following definitions:

**Diversity:** “Individual differences (e.g., personality, prior knowledge, and life experiences) and group/social differences (e.g., race/ethnicity, class, gender, sexual orientation, country of origin, and ability as well as cultural, political, religious, or other affiliations)” (AAC&U, n.d.b).

**Inclusion:** “The active, intentional, and ongoing engagement with diversity—in the curriculum, in the cocurriculum, and in communities (intellectual, social, cultural, geographical) with which individuals might connect—in ways that increase awareness, content knowledge, cognitive sophistication, and empathic understanding of the complex ways individuals interact within systems and institutions” (AAC&U, n.d.b).

**Equity:** “The creation of opportunities for historically underserved populations to have equal access to and participate in educational programs that are capable of closing the
achievement gaps in student success and completion” (AAC&U, n.d.b). McNair et al. (2020) provide additional specification:

- “Equity is a means of corrective justice (McPherson, 2015) for the educational debt (Ladson-Billings, 2006) owed to the descendants of enslaved people and other minoritized populations willfully excluded from higher education.

- Equity is an antiracist project to confront overt and covert racism embedded in institutional structures, policies, and practices (Pollock, 2009).

- Equity lets practitioners see whiteness as a norm that operates, unperceived, through structures, policies, and practices that racialize the culture and outcomes of higher education institutions” (pp. 19–20).

- Equity-Mindedness: “The term ‘equity-mindedness’ refers to the perspective or mode of thinking exhibited by practitioners who call attention to patterns of inequity in student outcomes. These practitioners are willing to take personal and institutional responsibility for the success of their students, and critically reassess their own practices. It also requires that practitioners are race-conscious and aware of the social and historical context of exclusionary practices in American Higher Education” (USC Center for Urban Education, n.d., para. 1).

Notes on Guide Development

This guide is based on data gathered from participants in AAC&U’s yearlong inaugural Institute on Open Educational Resources that launched in July 2021 and concluded in July 2022. Data collection included a baseline survey, artifact analysis of participating institutions’ OER goal-setting documents and action plans, and focus group interviews.

AAC&U and ISKME developed a baseline survey to ascertain the broad goals of participating institutions that were associated with DEI and the structures they currently had in place to support those goals. The survey was administered to participants near the beginning of the 2021–22 academic year. Forty-seven institutions responded to this baseline survey; of these, twenty-seven (57 percent) indicated that they had OER DEI goals beyond affordability. Additionally, using the sixty-six participating institutions’ one-page goal-setting documents, ISKME and AAC&U researchers inductively developed a code book to capture examples of DEI OER institutional goals and strategies, as well as structures in place that would support their work. An analysis of this coding revealed that affordability was the key driver of the majority of the participating institutions’ OER work.

With that said, a focus on OER to support other DEI goals also surfaced, with a combined 26 percent of institutions indicating that they were adopting OER to support either antiracism, social justice, accessibility, more equitable student learning outcomes, or culturally responsive teaching. In addition, an adapted version of the coding instrument was used to code a strategic sample of more detailed action plans for forty-one (62 percent) of the participating
institutions to surface additional information on strategies and structures that support OER and DEI integration. Finally, the research team examined survey data, one-page goal-setting documents, and action plans the campus teams developed during their first weeks in the institute to identify institutions with robust DEI and OER alignment. We then invited fourteen of those institutions to participate in semi-structured focus groups on the topic of DEI and OER near the end of the institute in 2022. This enabled teams to reflect on the success of the strategies they designed and then employed. Focus group transcripts were qualitatively, inductively coded using grounded theory to capture salient and recurring themes related to institutional advancement of DEI through OER. Finally, looking across the survey, one-pagers, and focus group data, the research team identified common goals and strategies for the advancement of DEI through OER. These data sources and the analyses described above resulted in this guide for change agents.

How to Use This Guide

This guide is intended to support the advancement of DEI through OER in higher education institutions. Administrators, faculty, and staff engaged in OER or DEI leadership and advocacy can use the guide to support the integration of OER and DEI policies and practices. Recognizing that institutions are at different stages in developing and implementing OER and DEI, the guide assumes multiple points of entry. Potential uses include:

- guidance for the development of new DEI-OER plans;
- direction for the formative assessment and revision of current DEI-OER plans;
- inspiration for a shared vision of the important strategies that higher education institutions need to implement to support this effort;
- discussion provocations for OER teams to consider when determining what is working well in equity-focused OER implementation and what needs improvement; and
- support for messaging for coalition building around the use of OER for DEI advancement.

The guide is divided into four sections:

- The first section articulates common goals of institutions that are working to advance DEI through OER.
- The second briefly addresses the digital equity issues that institutions must consider for any OER use that aims for equitable access to course materials.
- The third section outlines seven strategies that institutions use to advance DEI through OER, together with examples of these strategies in action.
- The final section provides an annotated list of other guides, tools, and frameworks available to support DEI-OER work.
A Guide for Campus Change Agents

DEI-OER goals, digital equity, and DEI-OER strategies are interrelated components that support the advancement of DEI through OER (see Figure 1). Institutions engaging in DEI-OER work typically start with goal development as a way to define and prioritize their work. As these goals all involve use of OER, digital equity is a necessary foundation to achieve any DEI-OER goal. Strategies are specific actions that can support the advancement of DEI through OER, in concert with or subsequent to ensuring digital equity. A detailed discussion of the three domains appears below.

Figure 1. DEI-OER Goals, Digital Equity, and Strategies

**DEI-OER GOALS**
- Using OER to support course material affordability
- Using OER to support culturally relevant and socially just curriculum and pedagogy
- Using OER to support accessibility and learners with disabilities
- Using OER to support more equitable student outcomes or success, including greater persistence and retention among traditionally underserved students
- Using OER to promote open pedagogy

**DIGITAL EQUITY**
- Device access
- Broadband internet access
- Digital access training
- Access to hard copies

**STRATEGIES**
- Engaging multiple institutional partners
- Developing communication strategies that explicitly connect DEI and OER
- Offering professional learning for faculty and leaders that aligns with DEI and OER
- Using data to understand the impact of OER/DEI implementation
- Building external collaborations
- Embedding DEI into OER course redesign and development grant programs
- Connecting OER/DEI with institutional mission statements, strategic plans, and internal governance structures

**Domain #1: Institutions’ DEI-OER Goals**

In planning and communicating ways in which OER can be used to advance DEI and support diverse students at an institutional level, it is essential to formulate specific goals. An analysis of the goals and action plans of sixty-six institutions engaged in developing their OER programs through their work in the AAC&U Institute on Open Educational Resources surfaced five common DEI-OER aligned goals:
1. Use OER to increase textbook affordability, decrease student debt, and support first-day access to course materials by eliminating material costs. With college textbook prices rising, institutions’ OER primary goals are to minimize or eliminate the cost of course materials, help reduce student debt, and ensure that all students have access to the course materials on the first day of class.

“Delaware State University is an HBCU and minority-serving institution. While some programs have adopted OERs, our goal is to expand OERs as an institution and remove the financial costs of textbooks. Many of our students struggle to afford the textbooks and often delay purchasing the required course materials. We see this as an equity and a social justice issue.”

—Delaware State University (from campus action plan)

2. Use OER to support culturally relevant, antiracist, and socially just curriculum and pedagogy. Institutions aim to support student belongingness, engagement, and a more just society by creating openly licensed curriculum materials that represent a diversity of voices and perspectives; reflect students' backgrounds, cultures, interests, and communities; reflect the history and culture of underrepresented minorities; and support critical dialogue around race, racism, and oppression.

“Our interdisciplinary programs seek to decolonize curriculum, challenge the Eurocentric canon, honor Indigenous intellectual authority, and critically engage the cultures and environments of Southeast Alaska. Open educational resources provide flexibility for local customization and creation of culturally relevant curricula to support these decolonized modes of instruction.”

—University of Alaska, Southeast (from one-page goal-setting document)

3. Use OER to support accessibility and learners who are differently abled. Institutions promote OER as a means of accessibility for students with learning needs because OER are often in formats that lend themselves to adaptation and customization for accessibility.

“One of our goals is to learn how to find, vet, and select OER, as well as conduct ongoing assessments of their usefulness and accessibility. When faculty encounter situations where OER are not available for their specific courses, we would like to be able to help them develop their own OER that are accessible to a diverse student population, including students who use assistive technology to access their textbooks.”

—York College of Pennsylvania (from one-page goal-setting document)

4. Use OER to support more equitable outcomes or success among students from groups that are underserved by higher education. Institutions use OER to improve student learning outcomes; increase student success, including progress in persistence and retention; and reduce student equity gaps.
“We have found that there is need for more research, resources, and education on OER in order for our initiative to thrive and to ultimately increase student success for all, regardless of economic barriers.”

—Hillsborough Community College, Florida (from campus action plan)

5. Use OER to promote open pedagogy. Institutions seek to engage and empower students and provide them with a voice in course materials, public discourse, and information production through collaborative creation of OER. Students are supported in creating or revising openly licensed materials such as textbooks and readings, assessments or assignments, annotations, blogs, or websites on topics related to course content, and incorporating student research in the creation of OER.

“Our ultimate goal is to partner faculty and students in content development to create new or enhance existing OER.”

—Northern Kentucky University (from one-page goal-setting document)

Domain #2: Digital Equity

While digital inequity existed well before March 2020, the pandemic highlighted the scope of this problem, which complicates and limits many students’ abilities to fully participate in all aspects of their education. Larger narratives regarding digital equity are exceptionally helpful as change agents seek to address OER and digital equity. For instance, the US Department of Education (2022) completed research that suggests there are three broad questions to address in terms of digital equity for our students:

- How can we ensure that students have equitable access to the internet and internet-ready devices?
- How do we ensure the availability of the internet at a price point that makes it affordable for all students so that they will indeed adopt it?
- What resources and support do we need to have in place to ensure and sustain the adoption of the technologies and practices supported by internet access?

For the last question, digital literacy training, multilingual technical support, and support outside of business hours are among the strategies that campuses can employ in service to digital equity. In addition to availability, affordability, and adoption, “assessment” might be added as a fourth pillar of digital equity. Collecting data in an ongoing fashion to determine the success of digital equity strategies is key, and disaggregating this data to better understand how various subpopulations are faring often leads to targeted strategies that can assist those students who have the greatest need.

Within the OER context and resulting from our research, it is important to remember that OER
are predominantly digital. A recurring theme among institutions engaging in DEI-OER work was that in order for OER to serve as a way to provide equitable access to course materials, a digital equity strategy must be in place that supports first-day access to free, online course materials for all students. Equitable access to a consistent internet connection is among the domains that OER advocates must consider as part of this larger digital equity concern. OER leaders may find that collaborating with campus IT structures, centers for teaching and learning (CTLs), financial aid, and other appropriate offices is required to ensure that all students have connectivity and devices appropriate for accessing materials. This may also necessitate collaboration with online course design departments and related support units to ensure that students have avenues to download and access OER in offline settings and contexts. For students who are new to the institution, digital equity requires communication and training in how to acquire digital course materials via course shells, online bookstores, or other digital distribution entities, as well as training on how to navigate and use the digital materials.

Further, services must be in place to assist students who need hard copies of course materials, including prisoners, military operatives who may be on assignments where they have limited device or internet access, and those with specific learning needs that preclude digital course material access (including short-term health-related conditions, such as concussions). Collaboration with bookstores and campus printing services, library reserve systems, and student disability services offices can support hard-copy access.

**Domain #3: Seven Strategies That Institutions Use to Connect Their OER Work to DEI**

Our research revealed seven strategies used by institutions to align their OER initiatives with their DEI policies and goals:

1. Engaging Multiple Institutional Partners
2. Developing Communication Strategies That Explicitly Connect DEI and OER
3. Offering Professional Learning for Faculty and Leaders That Aligns With DEI and OER
4. Using Data to Understand the Impact of DEI-OER Implementation
5. Building External Collaborations
6. Embedding DEI Into OER Course Redesign or Development Grant Programs
7. Connecting DEI-OER With Institutional Mission Statements, Strategic Plans, and Internal Governance Structures

Each of the following strategy sections includes an overview of the strategy, key roles in the institution that are essential in the implementation of the strategy, and a list of recommended steps for the successful implementation of the strategy.
Strategy #1: Engaging Multiple Institutional Partners

“We initially started to come together to create our strategic plan to really incorporate and bring together all those silos of OER at Valencia. And it turned into something bigger where we were able to create a larger team that was college-wide and a cross section of all levels of Valencia, so we had deans, we had faculty, we had our lead for online teaching and learning, a lot of different instructional designers as well as librarians become involved in our committee.”

—Devika Ramsingh, Librarian, Valencia College, Florida

Engaging allies and collaborators with shared DEI goals is important for institutions to successfully connect their OER work to campus-level DEI initiatives. A range of roles representing different initiatives, groups, and departments across campus should work together in a coherent and intentional way. Depending on a given campus’s organizational structure, the collaborators may include instructional designers, disability services representatives, students, student government representatives, institutional research officers, DEI leaders/committees, social justice officers, faculty, CTL staff, and librarians (see Table 2). Developing a coalition of partners working at different levels at the institution generates greater OER awareness, buy-in, and commitment. Our research found that engaging in regular communication and collaboration around OER across different institutional silos results in building:

- A common vision of how OER aligns with DEI;

Table 2. DEI-OER Partners Across an Institution

<table>
<thead>
<tr>
<th>Key Partners</th>
<th>Sample of DEI-OER Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>• Curate, revise, and create culturally responsive and antiracist OER materials.</td>
</tr>
<tr>
<td></td>
<td>• Use open pedagogy with OER.</td>
</tr>
<tr>
<td></td>
<td>• Use data and research to identify course-level impact of OER on underserved students.</td>
</tr>
<tr>
<td>Program Directors/</td>
<td>• Encourage and reward faculty adoption and creation of accessible, culturally responsive, and</td>
</tr>
<tr>
<td>Academic Deans</td>
<td>antiracist OER materials via course reviews, program reviews, and tenure and promotion guidelines.</td>
</tr>
<tr>
<td></td>
<td>• Implement program-wide OER to support zero-textbook-cost degrees or low-cost degrees.</td>
</tr>
<tr>
<td></td>
<td>• Arrange program-specific DEI-OER professional learning.</td>
</tr>
<tr>
<td></td>
<td>• Spotlight and share out accessible, culturally responsive, and antiracist OER within programs.</td>
</tr>
<tr>
<td></td>
<td>• Use data and research to identify program-level impact of OER on underserved students.</td>
</tr>
<tr>
<td>Key Partners</td>
<td>Sample of DEI-OER Activities (continued)</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Administrators</strong></td>
<td>• Align OER with strategic plan and institutional mission DEI goals and values.</td>
</tr>
<tr>
<td></td>
<td>• Seek funding for the adoption and development of accessible, culturally responsive, and antiracist OER.</td>
</tr>
<tr>
<td></td>
<td>• Form partnerships with other institutions doing DEI-OER work.</td>
</tr>
<tr>
<td></td>
<td>• Use data and research to identify institution-level impact of OER on underserved students.</td>
</tr>
<tr>
<td></td>
<td>• Implement an OER course marking system (i.e., a searchable system about OER courses) through the course schedule/listing.</td>
</tr>
<tr>
<td><strong>Instructional Design/Disability Services</strong></td>
<td>• Create guidelines for OER course materials and review them for accessibility and responsiveness to learner differences.</td>
</tr>
<tr>
<td></td>
<td>• Train faculty on accessibility and universal design for learning.</td>
</tr>
<tr>
<td><strong>DEI Director</strong></td>
<td>• Lead or help develop faculty professional learning about DEI and curriculum.</td>
</tr>
<tr>
<td></td>
<td>• Advocate with administrators for OER to support equitable student success.</td>
</tr>
<tr>
<td></td>
<td>• Facilitate partnerships between OER creators/adapters/adopters and other campus stakeholders who have DEI interests.</td>
</tr>
<tr>
<td><strong>Students/Student Government</strong></td>
<td>• Review OER course materials for relevance and anti-bias.</td>
</tr>
<tr>
<td></td>
<td>• Author OER course materials that reflect a diverse student population.</td>
</tr>
<tr>
<td></td>
<td>• Advocate with peers for no-cost and relevant course materials.</td>
</tr>
<tr>
<td></td>
<td>• Collect and share diverse student stories of OER impact and need.</td>
</tr>
<tr>
<td></td>
<td>• Join campus OER task force or project team.</td>
</tr>
<tr>
<td><strong>Institutional Research/Registrar</strong></td>
<td>• Track the impact of OER on course material access; pass/fail/withdraw rates for gateway courses and high demand/high-wage field majors; and college persistence/retention for underserved students.</td>
</tr>
<tr>
<td></td>
<td>• Track enrollment in OER courses versus other courses by subgroups of underserved students.</td>
</tr>
<tr>
<td><strong>Center for Teaching and Learning</strong></td>
<td>• Provide DEI-aligned professional development regarding OER and open pedagogy teaching and learning practices.</td>
</tr>
<tr>
<td><strong>Librarians</strong></td>
<td>• Curate accessible, culturally responsive, antiracist OER and teach faculty how to do so.</td>
</tr>
<tr>
<td><strong>Bookstore</strong></td>
<td>• Track OER courses to support research on OER impact.</td>
</tr>
<tr>
<td></td>
<td>• Make affordable printed copies of OER available to support learning differences.</td>
</tr>
</tbody>
</table>
• An understanding of how OER supports other equity-based institutional initiatives and goals;
• An understanding of how each role can contribute to DEI-OER implementation; and
• An understanding of the policies, resources, incentives, and conditions that are necessary for the advancement of DEI-OER.

Engaging multiple stakeholders and achieving these goals are not easy tasks. OER advocates and administrators must deliberately scaffold opportunities for collaboration and networking. Recommended strategies for engendering collaboration among partners across different roles include:

• Inviting representatives of DEI-related offices or initiatives to be part of an OER committee. Examples include representatives from the accessibility office, equity office, financial aid office, counseling services, or experts in DEI.
• Making a concerted effort to connect OER representatives with DEI officers.
• Actively involving OER representatives in existing, aligned curriculum committees and academic processes such as course and program reviews.
• Integrating OER with current DEI curricular reforms.
• Engaging and supporting students in reviewing OER from a diversity

At Lebanon Valley College (LVC), in addition to representatives from the administration and faculty, the OER team includes the director of educational technology and a member of the student affairs team who oversees food and clothing insecurity issues. The team has also worked closely with the director of accessibility to support faculty in understanding what is needed to make OER accessible at the earliest possible stage of OER adoption. Additionally, the OER team receives support from and collaborates with alumni, the Center for Global Education, the Committee for Inclusive and Intercultural Learning, the registrar, and two representatives from student government. OER leaders at LVC engaged with over forty collaborators in the space of a year, including the president of the university and the vice president of DEI. Collaborators helped the OER team with planning and with identifying potential challenges in OER outreach, implementation, and sustainability work. The LVC OER team has found the inclusion of student voices in its institutional OER planning and development to be especially valuable in helping identify and meet diverse student needs.
perspective. Providing plenty of opportunities for students to give feedback on selected OER and whether and how students see themselves in the curriculum. Seeking ways to meaningfully involve students and incorporate their input into the development of the curriculum. Inviting student representatives to join the OER team.

- Connecting OER with existing movements on campus that have a similar ethos (e.g., undergraduate advocacy initiatives, social justice initiatives).
- Contacting departmental/faculty leadership to raise their awareness about the impact of textbook costs on students as well as OER benefits that go beyond affordability. Using student empirical data and stories to advance conversations about OER. Taking advantage of established departmental meetings is an effective approach toward that goal.

**Strategy #2: Developing Communication Strategies That Explicitly Connect DEI and OER**

“We need to be telling multiple stories from an institutional and student perspective. We need to focus on the vertical and horizontal effects of OER—the benefits for students, faculty, and institution, both from an accounting and equity perspective, but also for autonomy/academic freedom.”

—Appalachian College Association (from campus action plan)

Explicitly connecting OER and DEI initiatives in communication strategies is essential to building an awareness of the commonalities between the two and suggests an institutional, rather than a department or office, commitment to the work. Simultaneously sharing the goals, benefits, outcomes, and successes of OER and DEI initiatives helps to raise awareness about the common goals shared by the two. Creating OER messages that appeal to equity goals beyond affordability (such as learning outcomes, student success metrics, social justice, accessibility, culturally relevant curricula, and open pedagogy) is another way to align OER and DEI. Messages are more effective when they are tied to the intended audiences’ interests (see Table 3) and incorporate empirical data as well as student stories that explain the common value and benefits of OER and DEI. Recommended approaches for developing communicating strategies that explicitly connect DEI and OER include:

- Creating campaigns to increase faculty and administrator awareness of textbook costs. This may include using student voices/stories about cost savings to show need and impact on the cost of textbooks.
- Recruiting faculty, curriculum specialists, academic deans and program heads, administrators, students, DEI directors, CTL directors, and others invested in DEI to become OER champions and spread the message about
OER as it relates to DEI goals.

- Developing targeted messages for different audiences, including students, faculty, and leaders, that speak to how OER can advance their DEI goals.
- Using different communication channels and media to broaden the reach of DEI-OER messaging, including infographics, short videos, blogs, and social media.

### Table 3. DEI-OER Messaging

<table>
<thead>
<tr>
<th>Audience</th>
<th>Sample DEI-OER Aligned Goals/Outcomes for Targeted Messaging</th>
</tr>
</thead>
</table>
| **Faculty**             | • Freedom to adapt curriculum to meet student needs, be culturally relevant, and align with social justice principles  
                          • Course materials that support disability accommodations  
                          • Equitable student outcomes or success, including persistence and retention, for underserved students in their classes or major due to material affordability/accessibility/relevance  
                          • First-day materials access (affordability/accessibility)  
                          • Student engagement through open pedagogy |
| **Program Directors/   | • Student belonging and success outcomes via materials that can be adapted on an ongoing basis to be culturally relevant to diverse cohorts of students  
                          • Social justice and antiracism principles reflected in the curriculum of their program/department  
                          • Course material accessibility in their program/department due to a program-wide commitment to material affordability/accessibility/relevance  
                          • Equitable student outcomes or success, including persistence and retention, for underserved students in program classes and majors due to a program-wide commitment to material affordability/accessibility/relevance |
| Academic Deans**       |                                                                                                                                                |
| **Administrators**     | • Equitable student outcomes or success, including persistence and retention, of underserved students in the college or university due to an institutional-level commitment to material affordability/accessibility/relevance  
                          • Student belonging in their institution via materials that can be adapted on an ongoing basis to be culturally relevant to diverse cohorts of students  
                          • Institutional commitment to social justice principles through course materials that support open pedagogy |
| **DEI Leaders or      | • Widespread adoption or creation of course materials that support culturally relevant curriculum and pedagogy  
                          • Widespread adoption and creation of social justice-aligned and antiracist course materials  
                          • Widespread adoption or creation of accessible course materials  
                          • Equitable student outcomes or success, including persistence and inclusion, for underserved students through materials that are affordable and support belonging |
| Offices**              |                                                                                                                                                |
| **Students**           | • Affordable course materials  
                          • First-day access to course materials  
                          • Accessible course materials  
                          • Curriculum and pedagogy relevant to student identities and communities  
                          • Curriculum that embodies social justice and antiracism principles  
                          • Student engagement through open pedagogy |
SPOTLIGHT
York College, PA

At York College, communicating how OER relates to DEI has been central to OER leaders’ faculty engagement work. The college recently developed an inclusivity statement that articulates the college’s commitment to equity. It states that York College:

- Welcomes and recognizes diversity in all of its forms and expressions.
- Encourages civil conversations across our campus to promote understanding.
- Stands up against prejudice and injustice in our college community.
- Advocates for the well-being and dignity of our community members.
- Enables marginalized identities to be their authentic selves.

OER leaders at York are working to promote OER as a way to support equitable access to course materials, in support of campus inclusivity. An OER team member shared: “[We’re] trying to help faculty members recognize that when they’re picking textbooks, they might have the best of intentions by trying to pick the highest quality, most comprehensive textbook out there...but when their students cannot afford to access it, it doesn’t matter that it’s a great textbook.” Also critical to faculty messaging is alleviating concerns that OER hurt academic freedom and emphasizing instead that OER allow faculty to collaborate with colleagues to create materials that are culturally and locally relevant to their students. OER leaders at York consistently emphasize in their messages to faculty how OER and their affordances provide concrete ways through which they can support York’s inclusivity and equity ideals.

Strategy #3: Offering Professional Learning for Faculty and Leaders That Aligns with DEI and OER

“Most universities have a center for teaching and learning... If you can incorporate pedagogy you are trying to promote, in this case OER or DEI, into required training or optional training, that’s going to be impactful.”

—National College, California

Post-secondary institutions are supporting the connection between OER and DEI through professional development that engages participants in topics such as accessibility assessment of instructional materials; localization and diversification of course content; involvement of students in content development and evaluation (i.e., open pedagogy); curriculum assessment for bias, inclusivity, and relevance to
students; and implementation of culturally responsive pedagogy. These are topics at the core of both OER and DEI since both initiatives aim to create more equitable and inclusive learning experiences, deepen student learning, and close equity gaps for students from groups that are underserved by higher education. Campus units, such as centers for teaching and learning, that already have recognized training schedules and programs are key partners in this work.

Examples of tools used in professional development training in this domain include:

- The Peralta Online Equity Rubric (Peralta Community College District, 2020)
- DOERS3 Equity Through OER Rubric (DOERS3, 2021a)
- ISKME Identifying Bias Tool (ISKME, 2021b)
- ISKME STEM Accessibility Framework and Guide (ISKME, 2021a)
- OpenStax Guidelines for Improving Representation and Diversity in OER Materials (OpenStax, 2019)
- Culturally Responsive Curriculum Scorecard (NYU Metro Center, 2019)

Recommended approaches for aligning OER and DEI through professional training include:

- Leveraging professional development opportunities that already exist on campus, such as new faculty orientation, CTL workshop schedules, and library offerings.
- Incorporating OER training into existing DEI training.
- Incorporating DEI training into existing OER training.
- Training faculty across all disciplines in building knowledge and practical skills on how to create and assess a culturally relevant curriculum.
- Training faculty and leaders on OER discovery, selection, and adaptation as well as open pedagogy.
- Identifying faculty across different content areas with strong culturally responsive teaching practices and providing opportunities for them to share their experiences and showcase their practices.
- Offering opportunities to students, faculty, staff, and leaders to attend conferences focusing on DEI-OER.
- Educating faculty about the diverse communities in which their students live.
- Analyzing discipline data (e.g., academic performance, retention/persistence, student engagement) to identify patterns of inequities impacting underserved students, and planning professional development designed to support faculty in strategies to support parity.
• Inviting speakers with diverse backgrounds who work on DEI-OER-related issues to participate in facilitated webinars or conduct workshops. This can include student speakers.

• Organizing conferences on campus where faculty in different departments can share practices that are connected to OER and culturally relevant teaching.

**Strategic Spotlight**

**Glendale Community College** OER leaders describe themselves as making a specific effort to advance DEI at their institution. One of the key ways in which they do this is through supporting equitable OER course material creation through faculty DEI training. At Glendale, this includes training faculty to understand and use the Peralta Online Equity Rubric. Faculty development leaders and Glendale’s DEI coordinator, all of whom have gone through Peralta’s full equity rubric training program, conduct the faculty training on campus. This professional learning experience helps Glendale faculty better understand issues related to creating an inclusive, unbiased, and culturally responsive curriculum, and teaches them to evaluate courses using the rubric. The training supports faculty in recognizing technology equity issues, helps them identify the ways in which student services can support student wellness and success, teaches them ways to align course materials with the universal design learning principles, supports them in representing Glendale’s population in course materials, and trains them in recognizing and mitigating human bias in course activities.

Undertaking this training has helped faculty be cognizant of the fact that many existing course materials do not represent the demographics of their school, where 75 percent of their students are Hispanic/Latino and most students are not full-time traditional students. It also helped faculty across all disciplines critically evaluate course materials in terms of equitable representation and bias. An OER leader shared: “One of the things that we found [though the training] is that science and math teachers don’t always recognize that they need to use this information to apply to their courses. Very often they think, well you know, there is no bias in science, there is no bias in math. And then we start getting into examples [that help them see the bias].” OER leaders also shared that undergoing this training has helped faculty further recognize the value of student connection and student belonging.
Strategy #4: Using Data to Understand the Impact of DEI-OER Implementation

“Time and time again, students from marginalized groups, students from different lenses, indicated that they did not see themselves belonging largely because they could not afford what their classmates could afford. So even though our diversity and inclusion climate survey reveals a lot of good information, I think the SERU [Student Experience in the Research University] survey actually gave us some valuable context for really thinking about what it means to belong, not just to be at a university, but to belong at a university, and how that transcends [having] just the on-campus living experience, [and] is reflected in the classroom.”

—Bethany Mickel, Instructional Design and OER Librarian, University of Virginia

Institutions that have successfully connected their OER work to campus-level DEI efforts regularly use data to understand student needs and the impact of OER on students and faculty. These data can also provide evidence on what works well and what doesn’t in OER initiatives as they relate to DEI goals and can guide decision-making for future steps. OER leaders often collect data on the impact of textbook costs on students; course material accessibility needs and preferences; and the relevance and relatability of curricular materials to students’ lives. Institutions that offer fully OER courses and Z-degree (a zero textbook cost degree) pathways often collect longitudinal data to track equity gaps in course enrollment, major and/or degree persistence, and academic outcomes (e.g., percentage of students who withdraw, fail, or pass), with the purpose of achieving parity in enrollment and equity in outcomes for students from groups that are underserved by higher education.

Critical to tracking student success in OER courses versus non-OER courses are course marking systems that allow for the identification of courses that use OER materials (Hare et al., 2021). Working with campus partners such as the bookstore, the registrar, institutional research, and faculty engaging in their own course evaluations can help with the identification of OER courses and with data collection and analysis.

Recommended approaches for DEI-OER data collection and impact assessment include:

- Designing data collection instruments (e.g., surveys, interviews, focus groups) for students to share textbook cost impact and course content impact on their sense of belonging and engagement with learning.
- Adding DEI-OER questions to existing university surveys, such as climate surveys, annual student surveys, course evaluations, library surveys, and disability services surveys.
• Developing an assessment plan to identify areas of OER impact as well as areas needing further attention to inform continued efforts. For example:

  • Disaggregate a variety of student data (e.g., academic performance, retention, persistence, engagement) for students of color and other underrepresented subgroups (e.g., Pell-eligible, first-generation students, students with disabilities). This can be done at the course, program, discipline, or institutional level. If possible, compare classes where OER was and was not adopted.

  • Gather data that potentially would link textbook costs with enrollment (e.g., students dropping courses or not taking a full course load).

  • Gather data from campus bookstore on textbook costs or survey students on the cost of textbooks.

  • Collect faculty data (surveys, interviews, focus groups) to assess barriers to integrating DEI into OER; needed supports for such integration; and experiences of teaching with DEI-aligned OER materials.

  • Create surveys for students to assess the accessibility and relevance of curricula, inclusive of openly licensed materials.

• Monitoring OER course enrollment to assess whether OER materials are equitably reaching students from underserved and historically marginalized populations.

• Monitoring OER course and program adoption to assess whether OER are available in courses required for high-wage/high-demand degree paths in which underserved and historically marginalized populations are underrepresented.

The following resources provide examples of student survey questions that support the collection of OER data pertinent to DEI:

• 2018 Student Textbook and Course Materials Survey (Florida Virtual Campus, 2019)

• Open Textbook Survey for Equity and Inclusion (Grewal, n.d.)

• Using a Student Textbook Survey to Advance an OER Initiative (Wertzberger et al., 2020)

• Student Perceptions of Open Pedagogy: An Exploratory Study (Hilton et al., 2019)

• Best Practices for Textbook Affordability and OER Initiatives (DePaul University Library, 2020)
Strategy #5: Building External Collaborations

“This year, I was involved in the Western Interstate Commission for Higher Education (WICHE), the original interstate compact. The commission created an OER working group, and that group had an intentional focus on equity, and so the group was brainstorming ideas for how WICHE could help leverage its connections to put together resources that would benefit all the participants.”

—Jonas Lamb, Associate Professor Library Science, University of Alaska Southeast

Engaging with collaborators who are external to the institution can effectively accelerate and amplify OER and DEI integration work. Even seemingly disparate institutions may find that they have faced similar challenges in connecting their OER work to campus-level DEI initiatives. Inter-institutional collaborations can be “local” or regional, including connections among two or more institutions in the immediate area, between a private college and a four-year university, or between a two-year and a four-year institution. They can also occur at the state, national, or international level. External collaborations need not be restricted to other higher education institutions. Relationships can be built with the larger communities within which the institution

The Minnesota State Colleges and Universities System has been working for the past few years to lay a system-wide foundation to support OER. Currently, system institutions have implemented thirteen Z-degrees (degrees that involve zero costs for course materials) and are implementing a course-marking system that allows students to identify individual OER courses. The system also provides stipends and support for the development of culturally relevant OER, with a goal of increasing persistence through graduation of low-income students and students who are Black, Indigenous, and people of color (BIPOC). The system uses data in a variety of ways to measure the impact of their OER program on their DEI goals. In addition to calculating student cost savings, OER leaders collaborate with the system’s institutional research unit to collect OER course enrollment data and disaggregate it by Pell status and race/ethnicity to assess parity in access to these courses. Future data analysis will include tracking retention, persistence, and the number of withdrawal, failure, or D grades for students in OER classes and zero cost degrees.
is situated. By expanding beyond the physical boundaries of a single institution to explore potential partnerships with community organizations, industry, and others, a campus’s curriculum content can be more effectively localized and diversified.

Recommended approaches for building external collaborations to support DEI-OER work include:

- Seeking out guidance or mentorship from institutions that are further along in their DEI-OER work.

- Participating in multi-institutional state or national professional development initiatives, such as AAC&U’s Institute on Open Educational Resources, and leveraging those opportunities to develop collaborations and partnerships with colleagues who have similar goals on other campuses.

- Engaging in formal short-term working groups or long-term consortial arrangements with other colleges and universities. Institutions in these collaborations often share resources and expertise, meet on a regular basis, and even host larger convenings at local college and university locations as well as online with one focus of their work being the intersection of OER and DEI.

- Considering joining an organization that offers mentorships, networking, and other collaborative opportunities to engage in this work with like-minded colleagues. These include (but are not limited to):
  - American Association of Colleges and Universities (AAC&U)
  - Creative Commons
  - DOERS3 (limited to system/statewide members)
  - Institute for the Study of Knowledge Management in Education (ISKME)/OER Commons
  - International Council for Open and Distance Education
  - Open Education Global/Community College Consortium for OER
  - Regional Higher Education Compacts:
    - Midwestern Higher Education Compact (MHEC)
    - New England Board of Higher Education (NEBHE)
    - Southern Regional Education Board (SREB)
    - Western Interstate Commission for Higher Education (WICHE)
  - Scholarly Publishing and Academic Resources Coalition (SPARC)

- Discovering local and regional partners with parallel DEI interests and collaborate with them. For example, consider collaborating with local African American and/or Latinx business owners’ associations or area tribal nations to build culturally relevant content together.
**Remixing Open Textbooks Through an Equity Lens (ROTEL)** is a collaborative initiative among six public Massachusetts colleges and universities as well as the Massachusetts Department of Higher Education. The program provides stipends, training, and support for faculty to develop and/or remix culturally relevant open textbooks for high-enrollment general education courses and career and professional courses, with a particular focus on supporting underserved, minoritized students. The initiative, led by Framingham State University, is funded by a $1,342,985 grant from the US Department of Education. The Open Textbook Coordinating Council, composed of an OER leader from each ROTEL consortium member, meets regularly to review OER course development proposals from faculty affiliated with the six consortium institutions. They also meet with an Industry Advisory Council composed of members from the healthcare, early education, and criminal justice sectors, which are large employers in Massachusetts, to ensure that college coursework is aligned with workforce requirements and skills.

**Strategy #6: Embedding DEI into OER Course Redesign or Development Grant Programs**

“We're supporting the faculty to redesign the curriculum, but we've also hired two instructional designers and an equity coach. The equity coach is something completely new, and that individual is working with the eight teams that are developing [OER] course resources, making sure that they're taking a diverse view of their materials, making sure that there’s accessibility, equity and access and so on, making sure there’s a common tone, and making sure that it’s an equal tone, well represented of different demographics within the state.”

—Timothy R. Anderson, System Director for Procurement and Contract Management, Minnesota State Colleges and Universities

Institutions connect their DEI and OER work by building DEI requirements and support into OER adaptation and creation mini-grant programs. As part of the application, DEI-aligned grant programs may ask for accessibility plans and a statement of how OER would advance DEI. Additionally, OER grants can compel DEI alignment as a requirement to receive funding. OER grants may also specify that resulting materials must reflect local students’ experiences and interests, especially
experiences of students from underserved communities; be accessible; reference the work of diverse authors and organizations; and include issues that are important to underrepresented groups. Appropriate training and scaffolding of faculty and/or collaboration with equity and accessibility experts are essential for successfully meeting such requirements.

Recommended approaches for aligning DEI and OER through OER grant programs include:

- Encouraging collaboration among faculty representing diverse identities and experiences in OER grant creation applications.
- Supporting projects that use open pedagogy to include student voices in course redesign and OER creation.
- Convening OER grant selection committees that consist of faculty, staff, and students representing diverse identities and experiences.
- Encouraging collaboration during the creation/adaptation of OER across different roles, including instructional designers, accessibility services staff, and digital media specialists.
- Supporting faculty creating OER by providing professional development, coaching, or mentoring on topics such as accessibility, development of a culturally relevant curriculum, and diversity and inclusivity in images and examples.
- Encouraging faculty to add DEI-aligned OER that they have created or adapted to an online OER library collection. Additions should be clearly labeled, indicating the community to which the OER is localized as well as accessibility, equity, and anti-bias guidelines that are met.
- Encouraging faculty to use equity and accessibility rubrics and tools to guide their OER creation/adaptation, such as those referenced above in Strategy #3: Offering Professional Learning for Faculty and Leaders That Aligns with DEI and OER.
The University of Virginia (UVA) Library offers “Affordability and Equity Grants” to faculty to adopt, adapt, or create an OER resource. Funded by UVA’s Jefferson Trust, faculty may receive $1,000 to adopt, $2,500 to adapt, and up to $5,000 to create OER. According to a representative of the university’s OER leadership team, while textbook affordability is an important component of this grant program, UVA sees it as supporting an equitable curriculum more broadly: “With our focus on all aspects of DEIA (diversity, equity, inclusion, and accessibility), our program helps faculty to use open resources and practices in ways that can transform the learning environment for all students.” For all three types of grant applications, faculty must answer the following question:

Describe how you will use this resource in class and the impact that it will have on student learning. How will you assess this impact? Tell us how this project aligns with institutional, school, or departmental goals for diversity, equity, and inclusion.

Workshops hosted throughout the year support faculty work. Past workshops have included sessions on open education and open pedagogy, Pressbooks familiarization, and copyright considerations. Librarians have also connected faculty with experts in digital production to support them in considering representation, language, and production through an equity lens in any media they produce for their OER. Another requirement for receiving a grant is compliance with the Americans with Disabilities Act accessibility guidelines. UVA librarians are available to support faculty grant recipients in making their OER accessible.

Strategy #7: Connecting DEI-OER with Institutional Mission Statements, Strategic Plans, and Internal Governance Structures

“The mission of our institution is around equipping students to think, care, create, and pursue justice... Openness really aligns with all of those, with the idea that access to knowledge and information and the ability to get it, and the accessibility of it and the inclusivity of it... is a human right, and something that people need to be equipped with in order to be successful and to advocate for themselves and others.”

—Isaac Gilman, Dean of University Libraries, Pacific University, Oregon
Determining how OER aligns with institutional DEI goals, such as those detailed in mission statements and strategic plans, can serve to develop support and buy-in for OER from administrators, faculty, and staff. Institutional mission statements may include elements of social justice, equity, service, knowledge creation, student empowerment, and similar themes that align with open pedagogy; knowledge sharing; and/or equitable access to course materials. Strategic plans may include goals for supporting student belonging, reducing cost barriers, or eliminating inequities in persistence/retention or course success. In publications, presentations, and marketing, the OER initiative should evoke this language and intentionally describe how OER contributes to the institution’s mission and goals.

In addition to aligning OER with institutional-level DEI mission statements and strategic goals, institutions can embed OER in program-level internal governance structures in a way that supports DEI. For example, faculty proposing a new course may be asked to consider OER in their course design, or more broadly, to share what steps they have taken to reduce the impact of course material cost on students. They may also be asked to share how their course materials will be culturally relevant to their student population. While the effort is challenging, institutions should try to embed OER and DEI alignment activities into tenure and promotion reward structures, with faculty having concrete incentives for course or materials development that meets student affordability, outcomes, and relevancy needs.

Recommended approaches for connecting OER and DEI with larger institutional goals related to the values of DEI such as in mission and vision statements, strategic plans, and other governance structures include:

- Participating in strategic planning processes and ensuring the resulting documents include language evoking OER.
- Creating an infographic or other graphic visual representations that illustrates the overlap of DEI, OER, and the institution’s mission or strategic plan.
- Creating targeted messages for administrators, faculty and staff, student organizations, alumni, and funders that explain how DEI and OER initiatives are promoting the institution’s strategic priorities and how DEI and OER fit with the history and identity of the institution.
- Identifying metrics to assess the institution’s progress toward DEI, OER, and strategic plan goals. Share achievements of each simultaneously.
- Embedding DEI-OER prompts in course and program review processes to encourage faculty to take into consideration best practices in building a culturally relevant curriculum and adopting openly licensed materials.
- Ensuring that formal tenure and promotion structures recognize and reward the creation of OER courses and course materials.
Regis College was originally founded in 1927 by the Sisters of Saint Joseph to serve immigrant women who typically did not have access to a college education. One of the core values of the Sisters of Saint Joseph that deeply influences the college’s equity and access work is “Love and services of the Dear Neighbor without Distinction.” Regis additionally champions the following ideals, aligned to its identity as a Catholic college: “inclusive excellence; academic excellence; access; formation of the whole person; and responsiveness to the common good.” Regis considers OER to align well with its history and ideals:

One thing about Regis I think is important is... it explicitly frames itself as having been founded on the needs of students to serve the underserved... So the DEI initiatives very much fit within the overall mission in how Regis perceives itself as an institution around the notion of the “dear neighbor”... and so we do embrace that notion of equity and access. And I think the OER project was a way of helping to walk that talk.

Regis also has an institution-wide DEI framework and strategic plan, which requires mandatory DEI training for faculty and staff, the inclusion of DEI in academic assessment of courses and pedagogy, and the collection and sharing of data about students’ course and program experiences. Regis’s OER workshops for mini-grant recipients are aligned with faculty DEI training goals, addressing not only licensing issues but also how openness relates to larger equity issues in terms of thinking about textbooks and authorship in relation to representation, and how open pedagogy and OER can make textbooks a community conversation. One OER open pedagogy project was a collection of student-created biographies of scientists from underrepresented backgrounds. From this project, Regis faculty learned the importance of scaffolding such projects by ensuring that students also understand the equity implications of their contributions to such work.

Regis has also seeded DEI and OER into institutional structures such as new course and course revision proposals, including questions such as “How does this course support our efforts around DEI?” and “Have you considered the textbook costs for this class?” The university considers the integration of OER and DEI into existing processes key to advancing equity.
Conclusion

Change in any social system is a complex process. In most contexts, it is not attainable through a single event or through short-term efforts. Those leading change, especially in settings where top-down decisions are culturally unpopular or not possible, must recognize that this work requires a strategy that embraces long-term engagement and a portfolio of evolving approaches. Adopting change and innovation is significantly more difficult to achieve in higher education than in other sectors (Bolman & Deal, 1999; Borins, 2001); however, nearly a century of research exploring change and innovation adoption has resulted in seminal texts that generally speak to fostering change in social systems (Rogers, 2003) and to fostering change specifically within educational contexts (Hall & Hord, 2001; Havelock & Zlotolow, 1995).

This publication presents strategies that are unsurprisingly consistent with the general recommendations found in the broader diffusion of innovation literature; however, the specificity of practice articulated by the campuses engaging in years-long work leading OER adoption efforts from a wide range of institution types and systems has resulted in the concrete insights found in this publication. All campuses interested in fostering a greater presence for OER and/or achieving DEI goals will find value in these strategies.

As OER adoption is not an event but a process; a part of that process is continued usage of the innovation as each semester passes. Connecting OER adoption to other threads within the campus’s core DNA will only serve to further instantiate OER into the mainstream culture of the institution. Indeed, as a higher education leader and advocate, ensuring the relevance and sustainability of the work is a central goal, and this publication provides important and meaningful strategies to achieve this aspiration.

It should be noted that as an OER itself, this guide is intended to serve as a living document and a starting point for conversation, revision, improvement, and customization for diverse institutional contexts and needs. Institutional understanding of and work around DEI and OER continue to evolve, and all DEI work is improved by elevating the voices of diverse community members. As such, readers are invited and encouraged to engage with this guide critically and conversationally; to add new goals, strategies, and examples from their own contexts; and to otherwise modify this guide to best meet the goal of supporting DEI and OER integration within their own contexts.
Appendix

Recommended Resources Supporting OER and DEI Work

Below is a brief list of resources to assist you as you move forward with this work. Institutions that participated in AAC&U's Institute on Open Educational Resources are using these resources. In addition, the resources were instrumental to the research that led to the development of this guide.

Frameworks on Culturally Responsive Teaching


Developed by the California Community College Curriculum Committee in 2020, this guide includes recommendations aiming “to support the implementation of a culturally relevant and responsive curriculum” (p. 2). The guide is addressed to a variety of education professionals, including faculty, administrators, and others who develop, review, and approve curricula in postsecondary education.


This guide intends to help faculty and instructors understand how they can create inclusive classroom environments through a variety of research-based tools and strategies that foster belonging for all students; develop “reasonable yet challenging” learning goals (Columbia Center for Teaching and Learning, 2020, p. 14); create inclusive and accessible course content; and strengthen educators’ self-awareness of biases and personal beliefs and their commitment to inclusion.


This framework aims to help education stakeholders create student-centered learning environments that affirm cultural identities; foster positive academic outcomes; develop students’ abilities to connect across lines of difference; elevate historically marginalized voices; empower students as agents of social change; and contribute to individual student engagement,
learning, growth, and achievement through the cultivation of critical thinking. (New York State Education Department, 2019, p. 7)

Each subsection of the framework is addressed to a different interest group—teachers, school leaders, district leaders, students and their families, higher education faculty and administrators, education department policymakers, and community members—and provides a “bank of strategies” (p. 17) for accomplishing the aforementioned goals.

**Tools for Assessing and Improving Inclusion and Equity in OER**


According to BranchED (2021), “quality is diversity” (slide 2), meaning that high-quality educator preparation embraces diversity, equity, and inclusion as fundamental (not tangential). The organization believes that race-blind, culture-blind, language-blind, and economics-blind teacher preparation is obsolete, as it does not adequately prepare teachers to engage with the diversity of the students in their classrooms. The BranchED Equity Rubric is intended for use by teacher educators to evaluate instructional materials for equity, and is organized around four broad dimensions of equity: learner-centered, critical, culturally sustaining, and universally designed for learning.


The DOERS3 OER Equity Blueprint consists of a theoretical framework, a rubric, and case studies that support closing equity gaps in higher education through OER. The theoretical framework provides a research-based foundation on how OER can contribute to equity and student success. The rubric is a self-assessment tool to support the integration of OER in higher education institutions in ways that contribute to equitable student success. The case studies are examples of work in which institutions are engaged to advance equity through OER.

Institute for the Study of Knowledge Management in Education (ISKME). (2021a). *STEM OER accessibility framework*. [https://docs.google.com/document/d/1jFJGiu90kmupJPITOcjc9D87KMLVXVoChr9CAqEnw/edit#heading=h.u0kis4bv7qqm](https://docs.google.com/document/d/1jFJGiu90kmupJPITOcjc9D87KMLVXVoChr9CAqEnw/edit#heading=h.u0kis4bv7qqm)

The STEM Accessibility Framework was developed by ISKME and SERC to support the curation and authoring of accessible STEM OER materials. It includes a checklist tool detailing twenty-three accessibility criteria, five of which are specifically relevant to STEM course materials. It also includes links to tools to help check for accessibility and to support the creation of accessible documents.

This tool was designed by ISKME to help educators evaluate the existence of bias(es) in educational resources and determine whether a resource should be used as is or modified. It can also be adapted as a self-reflection tool to be used at an early stage in an OER creation process to support authors in identifying and reflecting on their own social and cultural identities as they influence our biases.


Created by the NYU Metro Center, this scorecard was developed to assess English language arts curricula for cultural responsiveness. The scorecard has three sections. The first section, Representation, tallies characters and authors by race, gender, and ability and looks at the centrality and accuracy of portrayals. The second section, Social Justice Orientation, attends to a focus on decolonization, power, and privilege, centering multiple perspectives and connecting to real life and action. The final section supports the review of teacher materials for the selected curriculum, such as teacher manuals or unit or lesson plans.


OpenStax has created a collection of guidelines aiming to improve the representation of diverse students/users in textbooks. The guidelines include recommendations on how to approach the selection, assessment, and revision of different areas and elements within textbooks, including illustrations and photos; names of people; historical figures; geographies and situations; terminology; and controversial topics.

Peralta Community College District. (2020). *The Peralta online equity rubric.* [https://www.peralta.edu/distance-education/online-equity-rubric](https://www.peralta.edu/distance-education/online-equity-rubric)

The Peralta Online Equity Rubric is an openly licensed course evaluation instrument that aims to aid instructors in making their online courses more equitable. The three-point rubric includes eight criteria: technology, student resources and support, universal design for learning, diversity and inclusion, images and representation, human bias, content meaning, and connection and belonging. The Peralta Community College District also offers professional learning to support rubric use.
Screening for biased content in instructional materials.

This screening tool was designed to help school districts in Washington identify bias in course content materials, in compliance with the Washington State non-discriminatory law. The tool aspires to involve different stakeholders, including school administrators, educators, parents, and community members, in thinking about how instructional materials should engage students by ensuring that diverse life experiences are recognized, acknowledged, and valued. It includes a three-point scale that assesses several elements within the curriculum, such as the inclusion of a variety of roles and character traits, multiple perspectives and contributions, multicultural representation, diverse illustrations, images, and names.

Open Pedagogy: What Is It? How Has It Been Implemented?


This book is a compilation of case studies that illustrate how colleges and universities across the United States have implemented open pedagogy. It offers practical suggestions, ideas, and project recommendations of collaborations across students, faculty, and librarians.


This website was developed to be a resource about open pedagogy. It provides examples of how colleges and universities across the United States have implemented or experimented with open pedagogy.


This handbook aims to offer inspiration on how to engage students in researching, curation of materials, and production of openly licensed textbooks and other supplemental learning and teaching resources.
References


Grewal, M. (n.d.). *Open textbook survey for equity and inclusion.* https://docs.google.com/document/d/1cfHAWO1jOIWp0dSXJ9B3-Y76eq__bD710DuWfji4y2c/edit


Institute for the Study of Knowledge Management in Education (ISKME). (2021a). STEM OER accessibility framework. https://docs.google.com/document/d/1jFJGl9O9kmuiPJlTO_cjc9D87KMVLXVoChr9CAqEnw/edit#heading=h.u0kis4bv7qqm


About the Authors

C. Edward Watson, PhD, is associate vice president for curricular and pedagogical innovation and executive director of open educational resources and digital innovation at the American Association of Colleges and Universities (AAC&U). He joined AAC&U in 2017 after serving as the director for the Center for Teaching and Learning at the University of Georgia (UGA). In 2013, while at UGA, he launched their OER initiative, which, when Watson joined AAC&U, was ranked 2nd by OpenStax on their list of schools that had saved their students the most money through OER adoption. He also obtained grants supporting OER adoption and engaged in and published groundbreaking research in the domain. Since joining AAC&U, Watson launched AAC&U’s Institute on Open Education Resources, which has supported the OER work of 140 campus teams between 2021 and 2023. In addition to OER leadership at AAC&U, Watson also directs the yearly Forum on Open Learning and ePortfolios and AAC&U’s Institute on ePortfolios, and is the executive editor of the International Journal of ePortfolio. He also co-directs AAC&U’s Conference on General Education, Pedagogy, and Assessment and the Institute on General Education and Assessment. He is the author of two recent books, Teaching Naked Techniques: A Practical Guide to Designing Better Classes (Jossey-Bass) and Playing to Learn with Reacting to the Past: Research on High Impact, Active Learning Practices (Palgrave MacMillan).

Lisa Petrides, PhD, is CEO and founder of the Institute for the Study of Knowledge Management in Education (ISKME), a global education nonprofit working to make learning and knowledge-sharing participatory, equitable, and open. She is a scholar and international OER expert who has helped lead the development of tools and strategies to create and support the field of open educational practice. Her work includes the creation of ISKME’s award-winning OER Commons, a digital public library of open educational resources and collaboration platform that facilitates the discovery and improvement of high-quality digital resources that are free, openly licensed, and available for a diverse range of learners. She also serves as a member of UNESCO’s OER Dynamic Coalition Advisory Group, supporting the implementation of the UNESCO Recommendation on OER. She also currently serves as president of the San Mateo County Community College District Board of Trustees. Petrides has advised and led US and international development efforts that have enabled schools, colleges, universities, ministries of education, and the organizations that support them to expand their capacity to use data and information, and to create inclusive knowledge-driven environments focused on the improvement of teaching and learning. A former professor in the Department of Organization and Leadership at Teachers College, Columbia University, she received a PhD in education from Stanford University and an MBA from Sonoma State University.
Anastasia Karaglani, PhD, is a research associate at ISKME focusing on quantitative and qualitative data collection, data management, and analyses. She has worked as a research assistant at USC CRESST/UCLA and Stanford University conducting quantitative and qualitative research. She holds a PhD in education from the University of Southern California.

Selena Burns, PhD, is a senior research associate at ISKME who develops, manages, and implements research grants and applied research projects. Prior to ISKME, she was a senior research associate at Heller Research Associates, where she worked on NSF- and IES-funded STEM education research and evaluation projects. She previously worked in the global research department of the International Baccalaureate, taught writing and English Language Arts to youth for various organizations, and was a contributing writer for Arts in Color, an online platform whose mission was to support diversity in theater. Burns has a PhD in educational theater from New York University, an MA in communication from Stanford University, and a BA in anthropology with a minor in psychology from Wellesley College.

Judith Sebesta, PhD, is former vice president of ISKME Labs. Prior to this position, she was the executive director of the Digital Higher Education Consortium of Texas, where she managed a number of open education initiatives and research projects. She also served in a variety of roles at the Texas Higher Education Coordinating Board, including as project director for OER and director of innovation. Sebesta serves as the president of the Executive Council for the Community College Consortium for OER. She holds an MS from Florida State University and a PhD from the University of Texas at Austin.
About AAC&U and ISKME

The American Association of Colleges and Universities (AAC&U) is a global membership organization dedicated to advancing the democratic purposes of higher education by promoting equity, innovation, and excellence in liberal education. Through our programs and events, publications and research, public advocacy, and campus-based projects, AAC&U serves as a catalyst and facilitator for innovations that improve educational quality and equity and that support the success of all students. In addition to accredited public and private, two-year, and four-year colleges and universities and state higher education systems and agencies throughout the United States, our membership includes degree-granting higher education institutions in more than twenty-five countries as well as other organizations and individuals. To learn more, visit www.aacu.org.

The Institute for the Study of Knowledge Management in Education (ISKME) is an independent education nonprofit that works to make learning and knowledge-sharing participatory, equitable, and open. Founded in 2002 by Lisa Petrides, PhD, a former professor at Columbia University, Teachers College, ISKME is known for its award-winning digital public library, OER Commons (https://oercommons.org), as well as its international research agenda on open education and knowledge use in the education sector. ISKME’s research and professional development efforts enable schools, colleges, universities, and the organizations that support them to expand their capacity to collect and share information, and create knowledge-driven environments that champion equity, shape policy, and improve teaching and learning. To learn more, visit www.iskme.org.
Endorsements/Testimonials

Leveraging Open Educational Resources to Advance Diversity, Equity, and Inclusion: A Guide for Campus Change Agents

“The work to advance OER can be challenging on many fronts. Having a guide based on research and the lived experiences of OER change agents will enable your institution to enact useful and sustainable change. This thoughtfully written guide is filled with insights, tactics and strategies that will empower your OER team to gain and maintain the necessary forward momentum.”

—Robert J. Awkward, Assistant Commissioner for Academic Effectiveness, Massachusetts Department of Higher Education

“Here is an amazingly powerful and yet brief one-stop shop to help you build an OER strategy for your campus. This guide clearly articulates the broader value of OER to campus goals and DEI initiatives beyond lower costs and increased access. It provides details and examples of strategies: who to include in your coalition of support, which messages will gain traction, and how to make OER central to all of your student support efforts. Along the way are concrete examples from a wide range of institutions and a final list of excellent resources. This guide is the perfect tool to help you create change now.”

—José Antonio Bowen, Principal, Bowen Innovation Group and Former President, Goucher College

“This guide is an invaluable resource for campus leaders who are engaging in OER work. While we understand why OER could be a catalyst for advancing diversity, equity, and inclusion (DEI), it is challenging to operationalize these values in various institutional contexts. This one-of-a-kind resource provides expert guidance on how to intentionally integrate DEI in OER programs, policies, practices, and assessments. The seven strategies outlined in this guide provide a starting point for institutions thinking of incorporating DEI in OER. Each strategy is anchored on real-life examples from the Institute on Open Educational Resources participants who have successfully aligned and connected their OER initiatives with DEI. The annotated list of tools, guides, and frameworks provided at the end are essential for supporting DEI in OER work and serves as a resource for further exploration. As a campus OER leader, I came away with renewed hope and inspiration for my role as change agent. Reading this guide reinforced my conviction that our individual and collective work in advancing DEI can bring about transformation toward a more equity-focused education for all.”

—Regina Gong, Associate Dean for Student Success and Diversity, Helen K. and James S. Copley Library, University of San Diego
“Leveraging Open Educational Resources to Advance Diversity, Equity, and Inclusion is a must read for OER advocates exploring ways to make DEI an intrinsic part of an OER strategy. The strategic framework of creating goals and assessing digital infrastructure to drive DEI strategies is manageable and will enable the community to build approaches in which all learners see themselves in every facet of an OER implementation.”

—David Harris, Editor in Chief, OpenStax at Rice University

“This guide will provide an entry point for discussions on the ways diversity, equity, and inclusion goals are embedded within OER efforts. Educators representing both focus areas of the institution will find this book valuable, because it will serve as a foundation for ongoing collaborations and strategy development to support higher levels of student success by addressing inequities in the experiences of our students.”

—Tia McNair, Vice President for Diversity, Equity and Student Success and Executive Director for TRHT Campus Centers

“Leveraging Open Educational Resources to Advance Diversity, Equity, and Inclusion is a must-read for institutional, academic and DEI leaders seeking to expand and deepen equity driven practices that benefit all students. The authors make a compelling case for integrating OER strategies into DEI goals and provide a map for successful campus collaborations. At a time when higher education is increasingly inaccessible to many and when the clamor for DEI best practices can produce more obscurity than clarity, this campus guide outlines a set of practices that will have immediate and widespread impact on both the impact of deliberate OER strategies and how campuses design iterative and sustainable processes on a fast-changing landscape.”

—Mary Ann Villarreal, Vice President for Equity, Diversity, and Inclusion, University of Utah