

# The OER Equity Blueprint: The Role of OER in Advancing Equity

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## Blueprint Objective

The overarching goal of the DOERS3 OER Equity Blueprint is to define, unpack, and explain the multiple dimensions of equity and foreground the role of OER in closing equity gaps.

## Blueprint Outline

The Blueprint is composed of three sections:

### 1. Overview, Theoretical Framework, and Research Foundation

- a. Overview: What is the OER Equity Blueprint?
- b. Theoretical Framework: Vision, Values and Definitions
- c. Research Foundation

### 2. The Equity Through OER Rubric

A detailed guide and self-assessment tool to integrate equity and equity-mindedness into OER and mobilize OER to close equity gaps.

### 3. Case Studies\*

- a. Affordable Learning Georgia and Accessibility (Jeff Gallant)
- b. BC Campus and Accessibility (Josie Gray)
- c. The Ohio State University's Racial Justice Grant Program to increase diverse voices in course materials (Ashley Miller and Jasmine Roberts)

*\*We envision an initial set of case studies with additional ones to be added over time to the Blueprint.*



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## OER Equity Blueprint Overview

### What is the OER Equity Blueprint?

The OER Equity Blueprint (Blueprint) is designed to define, unpack, and explain the multiple dimensions of equity and foreground the role of OER in closing equity gaps.

The OER Equity Blueprint begins with the Theoretical Framework section, including a statement of the Blueprint's vision, values, and definitions. The Theoretical Framework draws on the work of those scholars and academic leaders who have elevated equity and social justice as essential to the mission of public education. The following Research Foundation section provides an overview of research into why and how OER programs have worked to improve access and affordability, deepen student learning, and close equity gaps for historically underrepresented and minoritized students. This research is emerging. There are other research and impact studies underway that will bolster the evidence and case for the critical role OER play in addressing equity and student success.

The Blueprint then moves into the practice realm with a rubric organized by roles and functions within and across higher education institutions. The *Equity Through OER Rubric* is a self-assessment tool designed to guide students, faculty and other academic practitioners and leaders to understand and act on the equity dimensions of OER. The rubric is the heart of the Blueprint, the tangible application of the design that enables higher educators to comprehend the big picture and work deliberately through concrete action to achieve it. Moreover, through the unpacking of roles and responsibilities for those focused on building engagement with OER across the multiple dimensions of higher education institutions, the rubric foregrounds the extent to which equity and quality are inextricably bound.

The final section of the Blueprint is a Case Studies section that shares exemplars and stories of OER work seeking to advance equity, including but not limited to specific initiatives, projects, research, and analysis. Additional case studies will be welcome once the Blueprint is published.

The Blueprint is licensed under a Creative Commons Attribution 4.0 International License (CC BY). It is designed to be adopted, adapted and customized by those who seek to utilize and improve it. DOERS3 intends for others to contribute their case studies, research, data and practice so that the Blueprint remains a living document, seeking continuous improvement and progress, like the movements for equity and social justice themselves.

## **Theoretical Framework: Vision, Values, and Definitions**

Why a blueprint for the role of OER in advancing equity?

As a collaborative, DOERS3 works to position its members and other higher educators to realize the promise of high-quality, accessible, and sustainable OER implementation to achieve equity and student success at scale. In recognition that equity requires intentionality of purpose and action, the DOERS3 Equity Work Group was convened to develop a blueprint identifying the equity dimensions of higher education engagement with OER, and to foreground the role of OER in closing equity gaps.

Attending to equity has always been implicit in OER. Globally, equity has been a stated goal of OER expansion across all educational sectors—P-20—exemplified in UNESCO’s commitment to Open Education and the 2007 Capetown Open Education Declaration. Higher educators focused on building engagement with OER across all types of institutions name equity as a primary motivation.

The OER Equity Blueprint goes beyond naming and explicitly binds equity outcomes to OER. In addition to elevating the multiple dimensions of equity, the Blueprint seeks to identify institutional players’ roles and responsibilities, and propose levels of engagement, action, and assessment designed to aid OER in fulfilling their promise. Building engagement with OER in higher education is about leveling the playing field for students by making college more affordable and inclusive, leading to improved student success. Course materials that are openly licensed allow higher educators to improve OER with attention to quality, cultural relevance, and responsiveness. In addition, a focus on equitable and equity-centered educational

environments requires attention to a level playing field for OER agents, including faculty, staff, and administrative leadership.

In a global environment of rising income inequality--much of which is race-based--increasing the students' social mobility serves as a driver of OER adoption and expansion. With this equity motivation at the heart of OER, other dimensions of equity must also be attended to, including ability, race/ethnicity, sexual orientation, gender, gender identity, geography, and digital and technological capital. Because inequities are historically rooted in income inequality and structural racism, closing equity gaps requires acknowledgement of—and confrontation with—those two barriers.

The DOERS3 Equity Work Group has been motivated by the work of many higher education leaders, both individuals and organizations. For example, the work group believes that “students’ cognitive, cultural and interdisciplinary diversity” (Ladson-Billings, 1994), should be included in any understanding of equity. The work group also views OER as a critical means to commit to and take action on inclusive excellence, as articulated by the Association of American Colleges and Universities:

*The vision and practice of inclusive excellence...calls for higher education to address diversity, inclusion, and equity as critical to the well-being of democratic culture. ...The action of making excellence inclusive requires that we uncover inequities in student success, identify effective educational practice, and build such practices organically for sustained institutional change. (AAC&U, n.d.)*

Equally critical is the insistence that the adoption and expansion of OER requires *equity-mindedness* to engender analysis of policy and practice to address “the distribution of power, access to resources and knowledge, and the reproduction of social stratification” (Bensimon, 2009).

Finally, Sarah Lambert’s work to reclaim the social justice dimensions of Open Education deepens and broadens the motivation at the heart of OER engagement and expansion. Without using the word “equity,” she provides a definition of Open

Education grounded in redistributive, recognitive, and representational justice that is all about equity:

*Open Education is the development of free digitally enabled learning materials and experiences primarily by and for the benefit and empowerment of non-privileged learners who may be under-represented in education systems or marginalized in their global context. Success of social justice aligned programs can be measured not by any particular technical feature or format, but instead by the extent to which they enact redistributive justice, recognitive justice and/or representational justice. (Lambert, 2018)*

*With equity-mindedness and social justice as guideposts, this Blueprint serves to guide Open Education leaders in institutions, systems, and state-wide organizations in implementing and assessing this core equity within their Open Education and affordability programs.*

## **Values**

The DOERS3 Equity Work Group holds the following values as guides in the development of the Blueprint:

- Learner-centered OER promotes equity, inclusion, and accessibility, captured in one member’s reminder that “we are teaching students—not content.”
- Recognizing inequities and working to redress them requires taking responsibility and action that is personal and professional, as well as individual and institutional.
- Equity and quality should be understood as constituent components of one another—inclusive, capacious, and interdependent. Efforts to make access, participation, and completion equitable without assurance of quality are a hollow promise.
- In higher education, achieving equity results in increased student success in terms of access, participation, persistence, completion, and entry into the workforce.

## **Definitions**

The DOERS3 Equity Work Group proposes the following definitions of equity, which has been developed by members and builds on their work and that of others, and

equity-mindedness, which has been developed by Estela Mara Bensimon.

## **EQUITY**

*Life chances and choices are limited by many kinds of inequality, including social, income, racial, ethnic, gender, and ability. Equity is a corrective process that demands fairness for marginalized and minoritized populations by reducing gaps in opportunity and achievement through systematic efforts.*

*In higher education, equity is measurable and must be attended to across multiple touchpoints along the student success continuum, including: **access** to, **participation** in, **persistence** through, and **completion** of **quality** educational programs across student populations, disaggregated by race/ethnicity, income, gender, ability, first-generation and geography, among other characteristics.*

## **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.”*

-From Estela Mara Bensimon at the [Center for Urban Education](#) at the University of Southern California

The DOERS3 Equity Work Group encourages all who engage with the Blueprint and the *Equity Through OER Rubric* to reflect on and determine definitions that are most appropriate and relevant to their own educational contexts. Likewise, they should reflect on and identify their context-specific student and practitioner populations of opportunity.

## Research Foundation

There is an emerging body of research on the impact of OER on closing equity gaps, deepening student learning, and improving student success outcomes.

The development and use of OER can create more equitable learning experiences for all students. Simply stated, the cost of textbooks and other ancillary course materials should not be a barrier to success in higher education. Adoption of OER provides all students access to necessary textbooks<sup>1</sup> that will enable them to be more successful in class, persist from one semester to the next, and complete their degrees. In addition, OER closes equity gaps because it provides students who cannot afford required course materials access to the resources they need. This is important given the survey results from the Babson Survey Group (2018) which found that, in a survey of 2,700 U. S. faculty, 52 percent of faculty “believe that cost is the primary reason that not all students have access to required course materials” (Seaman, J.E. and Seaman, J., 2019).

Moreover, several studies, as referenced below, affirm that OER use also improves student success outcomes.

- Students were able to use their textbooks on the first day of class rather than waiting to buy the textbooks – if they bought them at all - until they could afford them.
- Students learned and performed better academically when they had immediate access to their educational materials.
- Research has also shown that OER initiatives address and improve the performance of all students, but especially the most under-represented students in the United States.

The Center for Teaching and Learning (CTL) at the University of Georgia (UGA) began to encourage the use of OER in the summer of 2013. A study was conducted of faculty who taught large enrollment courses and were currently using an expensive textbook or textbook/technology package. For the more than 21,000

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<sup>1</sup> Whenever the phrase textbooks only are used, it also includes textbooks and other ancillary course materials.

students involved in this study, not only did they enjoy significant savings using work mostly created by OpenStax, but there was also a positive impact on their learning. The study at the University of Georgia also showed a significant and positive impact on under-represented students:

When considering Federal Pell eligibility, we observed an increase in A through B+ letter grades and a decrease in B through DFW grades. A significant decrease in DFW rates for Pell-eligible students was found (a 4.43 percent change) when OER was adopted as the textbook for the class. This research [also] revealed significant differences in academic performance (average final grade) for both White and non-White students enrolled in OER courses. But the magnitude in which non-White students' grades improved is very compelling (Colvard, Watson, & Park, 2018, p. 272).

These types of findings were echoed in the 2018 Achieving the Dream (ATD) community college study where 48 percent of Pell Grant recipients and 52 percent of under-represented minorities said OER courses had a significant impact on their ability to afford college compared to 41 percent for other students (Ashford, 2018). When students have access to course learning materials, it positively affects their in-class performance leading to student success, persistence, and completion.

The results from the 2018 ATD study were echoed again in the 2020 Achieving the Dream study conducted by their partners SRI Education and rpk GROUP (2020). This study involved eleven community colleges across the country. The average age of the study participants was 20. At least a third or more of the participating students were eligible for or had received a Pell grant. The proportion of students from historically under-represented ethnic minority groups ranged from 25 percent to 88 percent (SRI International, 2020). "In 6 of the 11 colleges, treatment students<sup>2</sup> taking OER courses accumulated significantly more course credits than those who had not taken any OER courses" (SRI International, 2020, p. 20). While the study did not find a significant impact on GPA by students taking OER courses, students maintained their GPAs despite taking more courses. Finally, "the number of credits earned by Pell students taking OER courses relative to their Pell-eligible peers was significantly

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<sup>2</sup> These are defined as students who received a high degree of OER courses by enrolling in three or more.



higher than the number of credits earned by non-Pell-eligible students taking OER courses relative to their non-Pell-eligible peers” (SRI International, 2020, p. 4).

Additionally, the benefits for part-time students were equally compelling. Higher education often overlooks part-time students, and 71 percent are self-financing their education (Bombardieri, 2017). This population contains many under-represented students and tends to be concentrated at community colleges. The UGA study found a 53.12 percent increase in average course grades and a 29.54 percent decrease in DFW rates for part-time students (Colvard, Watson, & Park, 2018).

A common concern among faculty and administrators is the accessibility of digital resources. Disability Services professionals know that online websites and resources often are not as accessible as they should be, even if they pass basic Web Content Accessibility Guidelines. As Camille Thomas wrote in a piece for SPARC News, “We all benefit from good user experience and access that is comprehensive, beyond compliance at the bare minimum.”<sup>3</sup> Thus, the use of OER offers an opportunity to promote an expansive definition of equity that addresses issues related to accessibility for all students in higher education. In addition, in order to further facilitate disability access there are three resources that are particularly helpful for faculty to consider when choosing and/or creating OER that improve student access; especially students with disabilities: a) *The BC (British Columbia) Campus Open Education Accessibility Toolkit* (2nd Edition 2018)<sup>4</sup> by Amanda Coolidge, Sue Doner, Tara Robertson, and Josie Gray; b) *The Floe Inclusive Design Learning Handbook*<sup>5</sup> by the members of the Floe Project of the Inclusive Design Research Center at OCAD University; and c) the adoption of Universal Design for Learning principles<sup>6</sup>.

Finally, the use of OER enhances faculty pedagogy and produces “significant benefits in instruction and student learning experience,” according to the study

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<sup>3</sup> Thomas, Camille. OER and Accessibility: Working Toward Inclusive Learning Open Education SPARC NEWS. MONDAY, OCTOBER 8, 2018. <https://sparcopen.org/news/2018/oer-accessibility-working-toward-inclusive-learning/>

<sup>4</sup> <https://opentextbc.ca/accessibilitytoolkit/>

<sup>5</sup> <https://handbook.floeproject.org>

<sup>6</sup> <https://www.inclusive.tki.org.nz/guides/universal-design-for-learning/>

from Achieving the Dream (Ashford, 2018). Over 60 percent of students reported their overall learning experience was higher in an OER course than in courses using traditional materials (Ashford, 2018; Colvin, Watson, & Park, 2018; Hilton, 2016; Hilton et al., 2016). It is important to add that the significant benefits are not because OER course materials are easier or of less quality. In a major meta-analysis conducted by Clinton and Kahn (2019), they found there was no meaningful differences in learning between students who utilized traditional textbooks and open textbooks. In addition, students using open textbooks were less likely to withdraw from their courses (Clinton & Kahn, 2019).

## Research Summary

*The use of OER is a significant contributor to increasing affordability for students by reducing the cost of textbooks and out-of-pocket expenses, reported by students as the second biggest cost challenge they face after tuition (Student Watch, 2017-2018). OER also contributes to improved student learning outcomes, persistence, and completion. Studies suggest that not only is OER effective at improving student learning outcomes, but it also has an especially compensatory advantage in improving the outcomes of under-represented students (Ashford, 2018; Colvard, Watson, & Park, 2018; Hilton, 2016; Hilton, et al., 2016; SRI International, 2020). Thus, OER is a critical element to address equity and improve quality.*

*The use of OER will not have any deleterious effect on faculty members' principles of academic freedom. In fact, the utilization of OER enhances academic freedom by providing additional resources not available to faculty using traditionally published curricular materials. OER published with Creative Commons licenses allow faculty to use course material in ways that would otherwise be impossible if using materials published under traditional copyright.*

The Georgia and Achieving the Dream research studies remain seminal to building the body of evidence for the ways in which *OER close equity gaps and deepen student learning and success*. There is emerging research from across North America and beyond that further reinforces the case, while also amplifying the need for additional research, data collection and analysis to explore further the role of OER in addressing systemic inequities across student populations, disaggregated by

race/ethnicity, income, gender, ability, first-generation and geography, among other demographics and characteristics.

DOERS3 is committed to advancing this research agenda across multiple fronts. The Equity Work Group will continue its engagement with the role of OER in addressing the full dimensions of equity in higher education. Additionally, the DOERS3 Research Work Group is addressing the need for additional research, data collection, and analysis through the establishment of common data standards and the collection of metadata organized around a set of research questions. As a collective, DOERS3 is united in delving further into the role of OER in enhancing quality and closing equity gaps in student learning outcomes and success.

## **Authors**

The OER Equity Blueprint was developed by members of the DOERS3 Equity Work Group: Robert Awkward (Massachusetts Department of Higher Education); Reta Chaffee (University System of New Hampshire); Brittany Dudek (Colorado Community Colleges Online); Ann Fiddler (City University of New York); Jeff Gallant (University System of Georgia); Rebecca Karoff (University of Texas System); and Clarendia Phillips (Texas A & M University-Corpus Christi). Critical input and support were also provided by Rebecca Bichel (University of Texas at Arlington), Deepak Shenoy (Deep Consulting), and Tim Anderson (Minnesota State University).

## **About**

The Driving OER Sustainability for Student Success (DOERS3) Collaborative is a group of 25 public higher education systems and statewide/provincewide organizations that are committed to supporting student success by promoting free, customizable open educational resources (OER). Launched in 2018, DOERS3 helps member organizations implement, scale, and sustain OER by advancing research and policy, sharing tools and learnings, and showing how OER can foster equity and student success. Learn more at [doers3.org](https://doers3.org).

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