

OER Action Plan Checklist

Meta

- Create goals for the upcoming year.
- Goals should focus on outcomes, not actions.
- Number of faculty adopting OER
- Number of students impacted by OER
- Student savings due to OER
- Student success due to OER
- Create a plan for how to reach your goals for the upcoming year.

Events

Ask the senior administrator who gives a speech at beginning of the semester (convocation) to include a plug for OER. Send one to two short sentences as suggested language. Example: “As part of our ongoing student success efforts, I also encourage you to consider using Open Educational Resources for your courses. OER also allow you greater freedom in your courses because they aren’t limited by heavy copyright restrictions.”

Ask to present about OER at both full-time and part-time new faculty orientations that happen in the fall.

- July-August: Prepare presentation.

Ask to host OER training sessions as part of your institution’s fall training day.

- July-August: Prepare presentations for these training sessions.

Reach out to department chairs (those where OER is readily available) and ask for five to ten minutes at their fall department kick-off meeting to talk about OER. Schedule dates/times of meetings.

- July-August: Prepare a one-sheet handout (not a link) to give to faculty listing the top one to three OER resources relevant to their department, with links to the books provided.

Schedule fall OER training workshop dates.

- Book rooms for the workshops.
- Line up presenters.
- July-August: Develop training materials and handouts.

If planning an institution-wide or regional event in either fall or early spring, start scheduling now.

- Decide when your event will be held.
- Decide what senior leadership or other VIPs from your institution need to be there, and sync possible event dates with their schedules.
- If you want an external national speaker, contact them now to secure a date. Most of the national speakers book up three to six months out.
- Place holds and/or schedule important rooms for the event.
- Create a rough outline of the event.
- Brainstorm who you want on your planning committee and start meeting or, if there will be faculty on your committee (which is encouraged), schedule the first planning meeting when the faculty are available.

Grants

If offering grants for adoption, adaptation, or creation of OER in the fall:

- Secure funding for the grants.
- Develop grant criteria and processes for grantees.
- Decide on deadlines for grants (due dates for submissions, when grantees will be notified, etc.).
- Develop grant submission review process (who will review grants, what the criteria will be to review grants).
- Meet with whomever will distribute the grant award money to faculty to ensure no issues in the process.

Policies and Procedures

Research steps to create or update course materials policy, OER policy, and textbook selection processes if you plan to update any of these within the coming academic year.

- Begin the processes or, if you need to wait until fall for stakeholders to return, get on the agenda for the first policy meeting in the fall.

If you plan to implement an OER class search function within the coming academic year, research the steps to accomplish this.

- Begin the process or, if you need to wait until fall for stakeholders to return, schedule a meeting for fall.
- At the meeting, be sure to secure commitments and due dates. Schedule check-in meetings right after major due dates to keep everyone on track.

General promotion and other tips

Meet with your marketing team.

- Provide dates, times, and locations of all events, and work with them to create a plan for marketing for each event.
- If doing a general marketing campaign for OER, meet with them regarding the development of the design and agree on tasks and deadlines.
- If doing a grant program, plan out the marketing of the grants and the post-promotion of the grant award winners.

Locate sample print copies of OER to pass around and show faculty at all presentations and events you hold throughout the year.

- Copies of OER from [Creative Commons](#), [MERLOT](#) or [The Orange Grove](#).
- [OpenStax](#) books may be purchased through your college bookstore.

Create a sign-up sheet. Take to every OER presentation you do (such as new faculty orientations) and pass around for faculty to sign up to learn more.

- Hint: More people will sign up if the first or second person who gets the sign-up sheet adds their information to it. So, hand it to someone who you know will fill it out.

Block off a few hours on your schedule one week after each event to follow up with any faculty who attended the event and see if they are interested in piloting or adopting OER.

Student engagement

Identify student advocates and SGA staff for the coming academic year.

- Obtain their timelines for formation of committees for the coming year.
- Follow up with stated intent to pass resolutions.
- Schedule meetings with them to explain OER and how they can be involved.
- Once you have established a relationship with a group of students, schedule a biweekly meeting to check in on the progress of OER efforts.

Wrap up the current year

Finalize all of your OER data for this year.

- Gather information about faculty adoptions of OER and their student impact.
- Analyze trends and momentum.
- Write up any internal reports you need to support your work.

Analyze what went well and what didn't go well.

- What tactics did you do this year that worked? What were those that didn't work?
 - Example: How many faculty who could adopt OER attended any workshops you held? Was the attendance worth the time you invested in them? Did any of the faculty who attended adopt an OER? If so, how many students did that new adoption impact over the course of a full year?
- What messages about OER resonated with your faculty? Which messages didn't?
- What marketing tactics (sending emails, posters, etc.) worked? What didn't work?



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