Recentering Relevance: Exploring the Role of Academic Libraries and Library Consortia in Supporting OER Localization

PROJECT JUSTIFICATION

The University System of Maryland seeks $149,877 for a **two-year planning grant** in the National Leadership Grant (NLG) category to articulate the role of academic libraries and library consortia in **increasing the relevance of open educational resources (OER) through OER localization**. The goal is to develop a framework that can be used across academic library and consortial contexts to position these entities as leaders in and supporters of OER localization.

> **Localization Defined:** The project team defines OER localization as the practices and partnerships necessary to increase the relevance of OER for differing student populations, student learning needs, faculty interests, and institutional and community contexts. Localization is made possible via the content and teaching affordances permitted by open licensing (e.g., customization of content through adaptation and creation; engaging students as collaborators in OER development).

We seek to explicate the replicable practices and partnerships that enable localization of OER to benefit the constituencies that academic libraries and consortia across the country serve: their students, faculty, institutions, and larger communities. Delineating the role of libraries and consortia in facilitating localization has important national implications for advancing the field of OER from a narrow focus on cost savings toward a broader commitment to equity and student success that continues to have cost savings as an important tenet. And it promises to help expand the national dialogue about the roles that academic libraries and consortia can play in contributing to student success through the development and sustained support of relevant, constituency-oriented instructional materials and practices.

This shift is necessary. Research has shown that just replacing commercial textbooks with similar OER does relatively little to improve student outcomes.[1][2] Moreover, Seaman and Seaman note that with the advent of lower-cost digital *commercial* materials, "[t]he most compelling OER messaging (primarily around cost and access) will be taken up by many others [e.g., inclusive access providers], and it will be increasingly important to demonstrate the value of OER beyond these criteria."[3] The value of OER beyond cost and access – and what differentiates it from lower-cost digital commercial materials – comes from the adaptation, creation, and sharing made possible by open licensing. This includes the opportunity to customize materials to increase their relevance for those engaging with them, from students and faculty to libraries, institutions, and larger communities.

Academic libraries and library consortia have a key role to play in enacting this shift. Academic libraries, historically leaders in information and resource management, "are frequently the center of OER initiatives on campuses."[4] As Smith and Lee note, "Their long term philosophical support for 'access' to information, their existing relationships with both faculty and students, and their outreach and instructional support experience make librarians a natural partner in OER initiatives….In short, academic libraries have the philosophy, competencies, relationships, and strengths to support, promote, and even cultivate and create OER."[5]

This work supports and advances NLG Goal 5, Objective 5.1 as follows:

[1] Hilton, J. (2016). Open educational resources and college textbook choices: A review of research on efficacy and perceptions. *Educational Technology Research and Development*, *64*(4), 573–590.

[2] Hilton, J. (2020). Open educational resources, student efficacy, and user perceptions: A synthesis of research published between 2015 and 2018. *Educational Technology Research & Development, 68*(3), 853–876.

[3] Seaman, J. & Seaman, J. (2019). *Inflection point: educational resources in U.S. higher education*. Bay View Analytics.

[4] Spilovoy, T., Seaman, J. & Ralph, N. (2020). *The impact of OER initiatives on faculty selection of classroom materials.* Bay View Analytics.

[5] Smith, B. & Lee, L. (2016). *Librarians and OER: Cultivating a community of practice to be more effective advocates*.

Goal 5. Strengthen the ability of libraries, archives, and museums to work collaboratively for the benefit of the communities they serve.	Recentering Relevance seeks to explicate the replicable practices and partnerships that enable localization of OER to benefit the communities that libraries and consortia across the country serve: their students, faculty, institutions, and larger publics. Library consortia, by their nature, emphasize collaboration and the scaling of shared effort.
Objective 5.1. Support the development of replicable systems that leverage institutional expertise and experience to maximize public access to and use of knowledge resources [including] building a collective set of goals, establishing shared vocabularies and common practices, formalizing workflow processes or protocols, establishing guidelines and standards, [and] building broad infrastructures.	Recentering Relevance seeks to develop an adaptable framework delineating library and consortia roles in leading and supporting OER localization. The goal with this planning grant is to gather transferable and translatable insights using Maryland libraries and consortia as a source for information and insight generation, with plans to expand to additional sites (other statewide library consortia, statewide OER initiatives) to continue to refine the framework post-planning grant.

Why Localization of OER Matters

In the U.S., OER use has been framed largely as an alternative to the high cost of traditional textbooks.[6] This aim of increasing affordability through OER is to "remove financial roadblocks that can derail students' progress."[7] As a corollary to increasing affordability, OER has been touted for how it enables day-one access to course materials to students who may otherwise be delayed in purchasing traditional textbooks, including low-income students relying on Pell grants that are disbursed weeks or months into the semester.[8] Important for this discussion, affordability and access to materials can be achieved by virtue of adoption of OER, irrespective of how well the OER fits with specific learner needs or specific institutional and teaching contexts.

With cost-savings and day-one access driving the value proposition of OER use in the U.S., there are two main reasons why OER localization matters. First is the recognition borne out by research that indicates that **simple adoption of OER course materials is unlikely to impact student outcomes**, other than student satisfaction, in appreciable ways.[9] Second, **commercial textbook publishers have pivoted toward inclusive access –** emphasizing day-one digital access to copyrighted materials at rates that are lower than print materials, reducing their own production costs, and transferring the student expense from out-of-pocket textbook costs to increases in tuition and student fees**.[10]** In 2017, *Inside Higher Ed* reported that major publishers offering inclusive-access packages had seen "significant" and "rapid" growth in this area, both in terms of new campuses signing agreements and existing client campuses expanding inclusive access across more courses.[11] The massive move to online teaching during the height of the Covid-19 pandemic also fueled the use of inclusive access. Nineteen percent of a national sample of teaching faculty surveyed in Spring 2022 said that an inclusive access subscription is a requirement for their largest

[6] Bliss, T., & Smith, M. (2017). A brief history of open educational resources. In R. Jhangiani & R. Biswas-Diener (Eds.), *Open: the philosophy and practices that are revolutionizing education and science* (pp. 9-27). Ubiquity Press.

[7] Achieving the Dream. (n.d.). *Pathways meta-majors*.

[8] Achieving the Dream. (2017, June 22). *After one year, largest initiative to promote the use of open educational resources for degree completion finds robust course development, strong faculty support, and broad-based leadership for OER use* [Press release].

[9] Robinson, T. (2015). *The effects of open educational resource adoption on measures of post-secondary student success* [Unpublished doctoral dissertation]. Brigham Young University, Salt Lake City, Utah. See also Hilton, J. (2016); Hilton, J. (2020).

[10] The general model for inclusive access is a subscription service based on traditionally copyrighted digital materials that institutions pay for up front, charging students back as part of tuition. The cost is less because print costs of hard-copy texts are eliminated.

[11] McKenzie, L. (2017, November 7). 'Inclusive access' takes off. *Inside Higher Ed.*

enrollment course, "more than double the response rate from 2019-20 (8%) and 2018-19 (7%), and a larger increase than any other curricula material."[12]

The advent of inclusive begs the question: What happens when the cost-savings benefit of OER is eliminated by the commercial publishers? What else about OER might be of interest that traditionally copyrighted publisher materials cannot provide? The answer, scholars note, centers on the affordances of open.[13] Open licensing allows users to **localize OER** - to increase the relevance of OER for differing student populations, student learning needs, faculty interests, and institutional and community contexts unencumbered by restrictive copyright provisions.

Benefits of OER Localization

Scholars have elaborated on this central premise in exploring the benefits of OER localization. This includes the ability to tailor resources to local cultures and languages and to personalize them for individual learners.[14] [15] [16] Localization can support a movement toward "place-based learning" to provide richer content around, for example, local ecosystems and Indigenous populations.[17] Additionally, through the localization of OER, faculty can increase relevance of materials for students, for example, around specific career or professional aspirations;[18] and diversify course materials by "exploring OER that can be revised and/or restructured to better represent the rich diversity of our students."[19] Relevance can be boosted through the engagement of students as co-creators of openly licensed content where students can share their own knowledge, perspectives, and insights into subject matter. Finally, Casserly and Smith describe the use of "fast feedback loops" to rapidly revise materials in response to student feedback and assessment data.[20] Learners do not all learn in lock step, in the same way or at the same pace. Localization offers a way to pinpoint the learning needs of different students and revise materials to meet those needs.

National entities are echoing scholar views on the importance of OER localization. Achieving the Dream (ATD), a network of more than 300 community colleges, recently highlighted the importance of OER localization "to optimize the learning experiences of the diverse range of students" participating in higher education today."[21] As ATD noted, "with OER, culturally responsive instructors can localize content to the specific community context of the class; translate open content into another language; incorporate learner content into the shared class materials; adapt content in response to learners' interests, backgrounds, and cultures; update content to eliminate bias, 'normative' perspectives, stereotypes, etc.; [and] share open learner content with a wider audience."[22] **Library organizations** are also recognizing the importance of OER localization to address systemic inequity. The American Library

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[12] Seaman, J. & Seaman, J. (2022). *Turning point for digital curricula: Educational resources in U.S. higher education, 2022*. Bay View Analytics.

[13] Jhangiani, R. (2017). Pragmatism vs. idealism and the identity crisis of OER advocacy. *Open Praxis, 9*(2), 141-150.

[14] Casserly, C., & Smith, M. (2010). Revolutionizing education through innovation: Can openness transform teaching and learning? In T. Iiyoshi & M. S. V. Kumar (Eds.), *Opening up education: The collective advancement of education through open technology open content and open knowledge* (pp. 61-75). MIT Press.

[15] Griffiths, R., Mislevy, J., Wang, S., Shear, L., Mitchell, N., Bloom, M., Staisloff, R., Desrochers, D. (2017). *Launching OER degree pathways: An early snapshot of Achieving the Dream's OER Degree Initiative and emerging lessons.* SRI International.

[16] Kimmons, R. (2016). Expansive openness in teacher practice. *Teachers College Record, 118*(9), 1-34.

[17] Blomgren, C. (2018). OER awareness and use: The affinity between higher education and K-12. *International Review of Research in Open and Distance Learning*, *19*(2), 55-70.

[18] Achieving the Dream. (n.d.). *Pathways meta-majors*.

[19] Cannon-Rech, D. (2022). Beyond affordability: developing policy to encourage faculty to explore OER as a means to create more diverse, inclusive, and socially conscious course materials. In C. Ivory & A. Pashia (Eds.). *Using open educational resources to promote social justice.* Chicago: Association of College and Research Libraries.

[20] Casserly, C., & Smith, M. (2010).

[21] Garth-McCullough, R. & Sebastian, R. (2020). *Using open educational resources to create a culturally relevant classroom*. Achieving the Dream.

[22] Ibid.

Association/Association of College & Research Libraries argue that central to the future of OER will be "moving the discussion about open educational resources (OER) beyond affordability to address structural inequities found throughout academia and scholarly publishing."[23] Importantly, "OER have the potential to celebrate research done by marginalized populations in the context of their own communities, to amplify the voices of those who have the knowledge but have been excluded from formal prestige networks, and to engage students as co-creators of learning content that is relevant and respectful of their cultural contexts."[24]

Our Project

To date, particularly in the United States, OER efforts have had a narrow emphasis on cost-savings that is attainable through simple adoption of existing OER.[25] The consequences of this emphasis on cost-savings through adoption translates to **academic library emphasis on the discovery and curation of existing OER**. This was borne out in a 2019 library survey within Maryland, where the most common OER-related activity reported by the community college libraries focused on providing support for identifying resources.[26] This emphasis leans heavily on the library and consortium role in resource acquisition and less on its roles as drivers of equity-centered practices; bridges between community and campus groups; experts at description, collection management, systems, and preservation; and as virtual and physical centers for academic inquiry and engagement. Breaking new ground, this planning grant **seeks to identify the conditions, practices, and partnerships necessary for academic libraries and consortia to lead the revision, remixing, retention, and redistribution efforts that can enable localization.** The project will account for the unique circumstances of libraries across sectors and institutional types through the engagement of Maryland's mix of institutions, academic library consortia, and sector organizations.[27] The project will deliver a framework for OER localization that the field can adapt, with the goal of centering equitable partnerships between libraries, library consortia, and other stakeholders.

National Need

Important to the vision of the IMLS NLG grant category, OER localization has national (and multi-local) application due to the infinite ability to revise and remix openly licensed materials. As OER is infinitely revisable, localized materials that are redistributed can be re-localized. For example, if there is interest in increasing the cultural relevance of materials, then materials that are localized for Historically Black Universities in Maryland could be re-localized for Hispanic Serving Institutions in Texas. The goal is to produce a framework for library and consortia leadership engagement in and support of OER localization that can be picked up and used across the country to help spur efforts to increase relevance of materials for specific learners and contexts.

Specifically, *Recentering Relevance* addresses three national needs:
1. *Redressing a narrow emphasis on OER adoption:* In the U.S., OER has been promoted to reduce textbook costs[28] and enable "day 1" access to materials.[29] **While simple adoption yields cost savings, it has not had an appreciable impact on student outcomes.**[30] **Moreover, the advent of inclusive access is pushing the field to dig into the affordances of open.**

[23] ALAstore. (n.d.). Overview of *Using open educational resources to promote social justice*.

[24] Ibid.

[25] O'Neill, N. (2021). *Examining the use of open educational resources among faculty in departments with multiple OER course conversions: Implications for practice*. (Publication No. AAI28775862) [Doctoral dissertation, University of Pennsylvania].

[26] Maryland Community College Library Consortium. (2019). *OER survey.* [Unpublished raw data].

[27] Institutions include 2-yr/4-yr, public/private, historically & predominantly Black universities and predominantly white institutions, rural/urban/suburban institutions. Library consortia include the University System of Maryland and Affiliated Institutions (USMAI) Library Consortium, Maryland Community College Library Consortium (MCCLC), and Congress of Academic Library Directors-Maryland (CALD). Sector organizations include USM, the Maryland Independent Colleges and University Association (MICUA), and the Maryland Association of Community Colleges (MACC).

[28] Bliss, T., & Smith, M. (2017).

[29] Achieving the Dream. (2017, June 22).

[30] Hilton, J. (2016); Hilton, J. (2020).

2. *Redressing a narrow emphasis on discoverability and curation:* An emphasis on OER adoption has led to academic libraries focusing on the discovery and curation of existing OER.[31] Recent studies have found little mention of academic libraries as sources of support for faculty in engaging in the adaptation and creation of OER.[32] [33] As noted above, discovery and curation leans on the library and consortium role in resource acquisition but does not embrace other critical roles, including as drivers of equity-centered practices. In part, **this work seeks to uncover why academic libraries are less central to OER localization and how libraries and consortia can become key partners in those efforts.**

3. *Increasing the relevance of OER:* OER localization moves the field toward development and use of OER that addresses student populations, student learning needs, and institutional and community contexts. For students, perceptions of relevance in course content and assignments are positively associated with course satisfaction[34] motivation to study,[35] and perceptions of learning.[36] Relevance also has critical equity and inclusion considerations. Gay emphasizes the need to "[use] the cultural knowledge, prior experiences, frames of reference, and performance styles of ethnically diverse students to make learning encounters more relevant to and effective for them."[37] **At its core, a library's mission is to center the needs of the communities it supports.**

National Dissemination

Throughout the planning grant, USM will make the tools and resources that are developed – the literature review, survey, focus group protocol, conference slides, process documents, the localization framework, and summative evaluation and report – openly licensed and discoverable through a **dedicated website** and Maryland's OER Commons microsite. USM will also make the summary data findings open access and discoverable. The grant-funded effort will engage the field in the process and findings through webinars, social media, and in-person and virtual conference presentations related to library practice (including library consortia organizations) and open education (e.g., regional conferences and the international Open Education conference). Moreover, the Maryland Open Source Textbook initiative (M.O.S.T.), led by the USM Kirwan Center for Academic Innovation, is a co-founder of Driving OER Sustainability for Student Success (DOERS3), a collaborative of 32 OER initiatives led by public higher education systems and statewide/provincewide organizations. The project team can disseminate project resources and findings to the leaders of these systems and organizations.

Target Audience and Beneficiaries

The main target group for this project fall into three categories:

● Deans, Directors, and Chairs of academic libraries and library consortia
● Librarians who support and advocate for OER initiatives at their institutions.
● Non-library stakeholders that support OER initiatives within and across institutions (e.g., teaching and learning centers)

Focusing the project's efforts on these three groups allows the project team to include the perspective of the leaders who have responsibility for the mission, goals, resources and services of their academic libraries or library consortia (and understand competing priorities and existing partnerships), librarians who have experience providing direct support for OER initiatives (and understand needed resources to support the adaptation and creation of OERs), and other stakeholders who are connected to supporting OER (and

[31] Maryland Community College Library Consortium. (2019).

[32] Griffiths, R., Joshi, E., Pellerin, E., & Wingard, A. (2022). Teaching and learning with open educational resources (OER). SRI International.

[33] O'Neill, (2021).

[34] Belet, M. (2018). The importance of relevance to student lives. *Teaching Sociology, 46*(3), 208-224.

[35] Frymier, A., & Shulman, G. (1995). "What's in it for me?" Increasing content relevance to enhance students' motivation. *Communication Education, 44*, 40-50.

[36] Fedesco, H., Kentner, A. & Natt, J. (2017). The effect of relevance strategies on student perceptions of introductory courses. *Communication Education, 66*(2), 196-209.

[37] Gay, G. (2010). Teaching to and through cultural diversity. *Curriculum Inquiry, 43*(1), 48-70.

understand how library services may overlap and interact with their own). Representatives from all three groups will be recruited as survey and regional focus group participants and will provide feedback on the findings and framework.

The ultimate *beneficiaries* of this project will be students. By creating a framework that expands academic library supports to the localization of OERs, educational resources can become more inclusive and relevant fostering a greater sense of belonging[38] which has been shown to be critical to students' learning and development.[39]

How This Work Builds on Prior IMLS Projects

In its 2022 IMLS proposal, the Virtual Library of Virginia (VIVA) addressed a need for low cost or no-cost ancillary materials while also recognizing the role of localized content in a more equitable student experience. VIVA's open homework repository project aims to facilitate adoption of OER by addressing faculty concerns about a lack of online homework resources while also championing the "creation of homework and assignment content that is more inclusive and representative of student populations."[40] VIVA also noted the central role libraries play in facilitating OER adoption and that consortia magnify the impact of OER initiatives. Similarly, a 2021 IMLS grant to the Louisiana Library Network (LOUIS) recognized the need to build a replicable model for libraries and library consortia, in their case around school and academic librarian collaboration around OER developed for dual enrollment courses. LOUIS also recognized the importance of localization, noting that dual enrollment OER needs to "meet the needs of diverse learners and institutional contexts, secondary and postsecondary."[41] Finally, the argument for localization of OER, and for understanding the enabling conditions for libraries to support and lead in OER localization, is similar to that made for the importance of local civic data in the University of Pittsburgh's 2017 IMLS Grant. The Civic Switchboard Project underscored that "the importance of local context and the variety of local civic data landscapes mean that no single model can be made to fit every city or region."[42]

PROJECT WORK PLAN
Project Description and Design

The project team will identify the strengths, weaknesses, opportunities, and challenges that exist related to OER localization for academic libraries and consortia across diverse higher education institutions. The project team will use the results of the information gathering to frame the academic library and consortia leadership, capacity, and partnerships needed to advance OER localization.

Project Goal

Specifically, the goal of the *Recentering Relevance* planning grant is to understand:

1. *current role(s)* libraries and consortia see themselves occupying in OER efforts;
2. *barriers* preventing academic libraries and consortia from collaborating in OER localization;
3. *optimal advocacy roles* for academic library and consortia to support OER adaptation and creation practices that lead to localization–observing mission, policies, resources, reporting lines, organizational configurations, and existing intra- and inter-institutional partnerships;
4. *necessary resources and support* for academic libraries and consortia to lead the revision, remixing, retention, and redistribution efforts that can enable localization; and
5. *a sustainability model* for academic libraries and consortia to maintain partnerships and practices that enable localization.

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[38] Goldwasser, M. M., & Hubbard, M. E. (2019). Creating and maintaining inclusive classrooms. *Forum on Public Policy Online, 2019*(1).

[39] Taff, S. D., & Clifton, M. (2022). Inclusion and belonging in higher education: A scoping study of contexts, barriers, and facilitators. *Higher Education Studies, 12*(3), 122–133.

[40] VIVA. (2022). *An open homework repository to aid adoption efforts in open education.* [IMLS Grant Proposal].

[41] LOUIS (2021). *Connecting the pipeline: libraries, OER, and dual enrollment from secondary to postsecondary.* [IMLS Grant Proposal].

[42] Civic Switchboard (n.d.). About.

Primary activities in this grant will be information and insight gathering and analysis followed by the development of a framework for bolstering academic libraries and consortia in supporting OER localization. The outcomes of this project will be shareable insights and tools to help build academic library and consortia capacity and collaboration aimed at leveraging OER to increase the relevance of course materials, and ultimately to enhance student outcomes.

Workstream I: Conduct Literature & Expert Review
Purpose: Mine the existing literature and national expertise related to academic library and consortia roles in OER localization. A comprehensive literature review will identify findings focused on the library role in OER localization, including creation and adaptation of OER. A virtual summit will invite national library and consortia leaders to share their perspectives on the evolving OER-role of academic libraries and consortia as well as current and future trends in OER initiatives, with emphasis on implications for localization.

Mechanism: Literature Review; Virtual Summit.

Activities & Objectives (YEAR 1):
- **Identify Project Team Members/Consultants** - The Co-PIs will recruit 2 project team members: a project manager and a library OER subject matter expert representing 4-yr institutions. The Co-PIs will recruit 3 consultants: a graduate student for the literature review, a survey developer, and a facilitator for virtual and in-person convenings.
- **Literature Review** - A Library and Information Science doctoral student will conduct a literature review to identify relevant currents, tensions, and debates related to the library role in the OER movement generally and OER localization specifically, drawing from peer-reviewed research articles, dissertations, white papers, conference presentations, and grant reports. Insights will inform the planning of the national virtual summit and the regional focus groups included in later phases of the project.
- **Virtual Summit** - The project team will identify and convene an intentionally diverse set of national academic library OER leaders and subject matter experts to a) discuss and respond to the findings of the literature review; b) probe national interest in, and support for, OER localization; c) help ensure transparency in connecting OER localization to the aims of enhancing diversity, equity, and inclusion (DEI); d) identify academic library and consortia roles in localization; and e) articulate the kinds of shifts needed to better position academic libraries and consortia in OER localization.

Workstream II: Identify Strengths, Weaknesses, Opportunities, and Challenges
Purpose: Probe findings from the literature review, virtual summit, and survey and to gather deeper qualitative insights into the strengths, weaknesses, opportunities, and challenges related to academic library and consortia leadership and support of OER localization. Emphasis will be on the 5 dimensions of the project goal related to strengthening academic library and consortium leadership and support of OER localization (current roles, barriers, optimal advocacy roles, necessary resources and support, and sustainability). The project team will engage library leaders, librarians, and other key stakeholders (e.g., teaching and learning centers, instructional technology units, digital accessibility units, student leaders, community partners) from diverse institutions given that OER interests, goals, and initiative characteristics (nascent/mature, formal/informal, bottom up/top down, etc.) can vary according to institutional mission, sector, and resource allocation. This approach will allow the project team to thoroughly analyze the current and future role(s) for academic libraries and consortia in OER localization and glean transferable insights that hold across a variety of institutional contexts.

Mechanism: Survey and Regional Focus Groups.

Activities & Objectives (YEAR 1):
- **Design Survey** - The project team will contract a consultant with expertise in survey design to draft, pilot test, and revise a survey over a 6-month period. Findings from the literature review and virtual summit will inform the survey item development.

- **Plan Focus Groups and Design Protocol** - The project team will conduct preliminary planning of focus groups, including drafting a semi-structured protocol based on literature review and virtual summit findings.
- **Administer Survey** - The project team will administer the survey, manage data collection, and compile initial results over a 2- to 3-month period.

Activities & Objectives (YEAR 2):
- **Analyze Survey Data** - The project team will analyze survey data, including disaggregating results by institutional type (2-yr, 4-yr) and other dimensions of institutional diversity as appropriate based on response rates. The survey data and analysis will be used to finalize the focus group protocol.
- **Conduct Regional Focus Groups** - The project team will engage participants across Maryland in regional focus groups. The project team will draw participants from diverse Maryland higher education institutions (2-yr/4-yr, public/private, historically & predominantly Black universities and predominantly white institutions, rural/suburban/urban institutions). These convenings will engage academic library leaders and staff as well as other stakeholders in OER localization. Focus group invitations will be disseminated through channels associated with the University System of Maryland and Affiliated Libraries Consortium (USMAI), the Maryland Open Source Textbook Initiative (M.O.S.T.), and the Maryland Chapter of the Association of College & Research Libraries Division of the American Library Association.
- **Analyze Focus Group Results and Synthesize Data** - The project team will synthesize quantitative (survey) and qualitative (survey and focus group) data, and assess the impact the findings have on subsequent project objectives.

Workstream III: Develop Framework
Purpose: Develop a framework to strengthen academic library and consortia leadership in, and support of, OER localization, focused on current roles, barriers, optimal advocacy roles, necessary resources and support, and sustainability as well as other important dimensions gleaned through the information gathering and analysis processes.

Mechanism: Multiple Cycles of Review and Refinement.

Activities & Objectives (YEAR 2):
- **Draft Framework** - Drawing on analyses of data collected to date, the Co-PIs will lead the team in drafting the framework.
- **Solicit Feedback** - The Co-PIs will engage the project team in review and refinement of the framework, then engage regional and national academic library experts in OER in further review and refinement.

Workstream IV: Disseminate Findings and Framework
Purpose: Share transferable insights aimed at building capacity for OER localization (including OER creation, revision, publication and sharing, and retention) among academic libraries and consortia. The project team will disseminate findings and possible interventions to Maryland library consortia and to library consortia in nearby states. The **dedicated project website** and OER Commons microsite will make findings available nationally and will include mechanisms for feedback from both participants in the grant effort and other observers. The project team will also present findings and the framework at both national library conferences and meetings and national/international OER conferences and meetings. See also National Dissemination under Project Justification.

Mechanism: Website Creation, Publication, and Presentation.

Activities & Objectives (YEAR 1 and 2):
- **Build & Maintain Dissemination Mechanisms** - The project team will develop and maintain a dedicated website for dissemination, in addition to existing mechanisms (e.g., Maryland OER Commons microsite).

- **Launch Strategic Communications Campaign** - The project team will share the results of the work through a multipronged communication campaign, including regular updates via key listservs (e.g., SPARC Libraries & OER Forum), social media, and webinars and conference presentations (e.g., International Coalition of Library Consortia (ICOLC) meeting, the Open Education conference, the Driving OER Sustainability for Student Success (DOERS3) statewide OER collaborative annual meeting).
- **Identify & Share Resources** - The team will create a **dedicated website** for the grant-funded work and activities and will publish findings, white papers, and presentations there and share them via Maryland's OER Commons microsite. This ongoing effort will emphasize transparency and collaboration with participants and interested parties (see also National Dissemination, above).

Workstream V: Evaluate and Regularly Communicate Progress
Purpose: Ensure efforts lead to timely completion of project goal. The team will conduct weekly progress reviews to analyze the effectiveness of grant-funded activities and make adjustments to activities as needed. In addition, the project team will use feedback from participants over time to make adjustments to workflow and processes as needed and maintain forward momentum in achieving the goal of the planning grant. The team will provide quarterly progress updates to project participants and other stakeholders, and at the end of the grant period, they will develop and share a summative evaluation and grant report.

Mechanism: Weekly Project Team Meetings, Participant Feedback, Feedback from Dissemination Activities.

Activities (YEAR 1 and 2):
- **Assess and evaluate** timeliness, completeness, and efficacy of survey, convenings, and other project activities.
- **Utilize participant evaluations** to help improve subsequent engagement with stakeholders.
- **Provide regular progress updates** to participants, experts, supporters, and program officer.
- **Share a summative evaluation and report** to the field and program officer.

Diversity Plan
A vital part of any library mission is to center the diverse needs of the communities it supports. Libraries supporting the localization of OER to meet the unique needs of a community of learners moves the field toward development and use of OER that enhances diversity, equity, and inclusion (DEI).[43] At the same time, the project team recognizes a need to make DEI goals *explicit* within a framing and description of OER localization, and this will be an early priority within the project. The team will tap into the national experts that are engaged early in the project to help ensure transparency around these critical aims of localization. As a result, this Framework can be used by the field to help ensure that DEI are foregrounded when localizing OER content, helping to strengthen the field's commitment to these goals.

The project also intends to model inclusive engagement of colleagues, both national and within Maryland. With this project being centered in Maryland, a minority majority state with a highly diverse higher education sector and strong academic library and sector consortia,[44] the project team is well-positioned to draw into the project a wide spectrum of experience and expertise related to OER. To ensure a diversity of perspectives, the team will engage participants across a diverse group of institutions (2-year/4-year, private/public, predominantly white institutions and predominantly and historically Black institutions). Additionally, the team will set a goal that at least 50% of focus group participants are from institutions that serve a majority of underrepresented, first-generation, and/or minoritized students. The team will make sure that all deliverables available at the end of this project, such as the framework, surveys, and any other resources will be made accessible for people who use assistive technology.

Project Results

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[43]American Library Association (2021). *Code of Ethics.*
[44] See footnote 26.

This project will result in an evidence-based framework describing replicable practices and partnerships that enable OER localization. Specifically, the framework will delineate the role of academic libraries in facilitating OER localization as well as the complementary roles played by key partners, such as instructional design units, teaching and learning centers, as well as faculty and students. Importantly, the framework will also delineate the role of academic library consortia in a) offloading some of the burden of OER discovery and curation from member academic libraries by centralizing those tasks, freeing up academic libraries to lead and collaborate in developing materials of local relevance and b) supporting member academic libraries in helping to address commonly held challenges associated with OER localization.

The deliverables of the project, the discussions that inform them, and the discussions that occur after their development, are intended to advance the field of OER from a narrow focus on cost savings toward a broader commitment to equity and student success that continues to have cost savings as an important tenet. The project also intends to spur national dialogue about the roles that academic libraries and consortia can play in contributing to student success through the development and sustained support of relevant, constituency-oriented instructional materials and practices.

As noted above, the deliverables, including the localization framework, will focus on the *replicable* practices and partnerships that enable OER localization. The deliverables (literature review, survey, focus group protocol, conference slides, process documents, framework, and summative evaluation and report) will be openly licensed, published on a dedicated website, included in the Maryland OER Commons microsite, and shared across OER and academic library networks (e.g., SPARC Libraries & OER Forum, International Coalition of Library Consortia (ICOLC), and the Driving OER Sustainability for Student Success (DOERS3) statewide OER collaborative). In addition, the project team will also make the summary data findings open access and discoverable. Sustainability of the resources is ensured through the collaboration of the USM Kirwan Center for Academic Innovation, which in 2018 was legislatively mandated to lead statewide OER efforts, and USMAI, which has shared resources and professional development as core functions. Additionally, the deliverables will be uploaded to the USMAI open access repository, MD-SOAR, for access and sustainability.

Future Directions
The development of the framework for OER localization will take place in Year 2 and will include initial feedback cycles with Year 1 participants as well as additional thought leaders who can offer fresh perspectives on the emerging framework. The results will pave the way for the project team post-planning grant to gather broader feedback on the framework and to test out its efficacy in building capacity among academic libraries and consortia to support OER localization, both in Maryland and nationally. The framework, specifically, may need to be adapted (localized) to other contexts, and it is the project team's intent to engage with partners in other states to test the use of the framework, track any needed adaptations of it, and from that wider testing, develop capacity-building professional development for both academic libraries and consortia focused on OER localization.

Project Team
Nancy O'Neill, Ed.D. (Co-Principal Investigator and Project Director), Acting Director, USM William E. Kirwan Center for Academic Innovation; Andrew K. Pace (Co-Principal Investigator, Executive Director, USMAI Library Consortium); Colleen McKnight (Lead Subject Matter Expert, 2-year institutions), Director of Library Services at Frederick Community College; TBD (Lead Subject Matter Expert, 4-year institutions); TBD (Project Manager). See Project Staff and Resumes documents for more information.

Budget Summary: The total 2-year request of $149,877.00 includes: $44,000 for Project Management; $1,500 for Literature Review; $15,000 for Survey Development; $32,000 for Subject Matter Expert Leads (stipend for 2 years for 2 library experts, one from Maryland 4-yr and one from Maryland 2-yr institutions); $500 for Materials & Supplies (meetings, convenings, etc.); $6,000 for travel and conferences (3 conferences); $12,450 for Regional Convenings (3 regional convenings); $7,500 for a convenings facilitator; and $30,927 in Indirect Costs.

Applicant Name: University System of Maryland

Project Title: Recentering Relevance: Exploring the Role of Academic Libraries and Library Consortia in Supporting OER Localization

Schedule of Completion	2023					2024												2025						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
WORKSTREAM I: CONDUCT LITERATURE & EXPERT REVIEW																								
Identify and recruit experts	■	■	■	■	■																			
Literature Review				■	■	■	■																	
Virtual Summit Meeting - Planning			■	■	■																			
Virtual Summit Meeting						■																		
WORKSTREAM II: IDENTIFY STRENGTHS & WEAKNESSES, OPPORTUNITIES, AND CHALLENGES																								
Design Survey & Focus Group Protocol				■	■	■	■	■																
Administer Survey										■	■													
Regional Convenings / Focus Groups																■	■	■						
Analysis and synthesis of data													■	■	■	■	■	■	■	■	■	■	■	■
WORKSTREAM III: DEVELOP FRAMEWORK																								
Develop Localization Framework																				■	■	■	■	■
WORKSTREAM IV: DISSEMINATE FINDINGS AND FRAMEWORK																								
Build & maintain dissemination mechanisms	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Strategic communications campaign	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Identify & Share Resources						■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
WORKSTREAM V: EVAUATE AND REGULARLY COMMUNICATE PROGRESS																								
Project Team Meetings	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Outreach to participants		■		■		■		■		■		■		■		■		■		■		■		■
Assessment: effectiveness, efficiency, timeliness				■						■						■								
Solicit participant feedback: effectiveness, efficiency, quality							■									■	■							
Summative evaluation & report																							■	■

Applicant Name: University System of Maryland
Project Title: *Recentering Relevance: Exploring the Role of Academic Libraries and Library Consortia in Supporting OER Localization*

Digital Products Plan

Type: What digital products will you create?

The digital products produced out of this project will include the following:
- A literature review focused on the library role in OER localization, including creation and adaptation of OER;
- A survey that will be developed and administered at the end of year one of the grant;
- A focus group semi-structured protocol;
- Summary data findings;
- Conference handouts/slides, blog posts, social media updates, etc.;
- Process documents delineating the steps involved in building an evidence-based framework to advance the field;
- A Framework delineating library and consortia roles in leading and supporting OER localization; and
- A summative evaluation and report.

Text-based materials will be converted to accessible PDF documents and Word documents. Any presentation slides will be made available as accessible PDF documents.

Availability: How will you make your digital products openly available (as appropriate)?

All public-facing outputs (literature review, survey, focus group protocol, conference handouts/slides, process steps, and framework) will be openly licensed and discoverable through a **dedicated website** hosted by the University System of Maryland as well as through Maryland's OER Commons microsite. The grant deliverables will be promoted through USM and USMAI communication channels and as well on other professional listservs related to OER and libraries.

USM will also make the summary data findings open access and discoverable via the dedicated website and Maryland OER Commons microsite.

Access: What rights will you assert over your digital products, and what limitations, if any, will you place on their use? Will your products implicate privacy concerns or cultural sensitivities, and if so, how will you address them?

All public-facing outputs will be licensed under a Creative Commons license and shared widely and without any access restrictions. The summary data will be made open access and discoverable. The University System of Maryland will assert no ownership rights beyond the stipulations made in the Creative Commons license used and the parameters of open access.

With respect to privacy, raw survey data, raw focus group data, and project team notes will be stored in a password-protected database accessible only to the project team. Project team members will receive an orientation on data privacy prior to the start of data collection.

No data that would allow participants or institutions to be individually identified will be included in the open access summary data or final report. Informed consent will be obtained prior to survey administration and focus groups to provide the project team with the latitude to include de-identified qualitative statements to illustrate themes from the focus groups, for example. Potential cultural sensitivities will be addressed through data aggregation and de-identification.

Sustainability: How will you address the sustainability of your digital products?

All public-facing outputs will be saved in standard file formats to ensure long-term accessibility and sustainability. In addition to sharing these outputs via the dedicated website and Maryland OER Commons, the outputs will also be uploaded to the USMAI open access repository, MD-SOAR. Content uploaded in this manner will automatically be assigned a Digital Object Identifier (DOI). All MD-SOAR services undergo regular backups and data protection.

Applicant Name: University System of Maryland
Project Title: Recentering Relevance: Exploring the Role of Academic Libraries and Library Consortia in Supporting OER Localization

Organizational Profile

The University System of Maryland (USM) is the state's public higher education system. USM's 12 institutions, 3 regional higher education centers, and System office work closely together to leverage their collective expertise and resources, share best practices, increase the system's effectiveness and efficiency, and advance USM's mission to improve the quality of life in Maryland.

Benefiting students, as well as Maryland and its citizens, USM:

- Offers expansive access to aff-ordable, high-quality educational opportunities.

- Performs groundbreaking research.
- Instills a culture of innovation and entrepreneurship.
- Promotes economic growth and workforce development.
- Provides vital services to communities and individuals.
- Partners with business, governmental, nonprofits, and organizations to improve quality of life.

Mission
The mission of the University System of Maryland is to improve the quality of life for the people of Maryland by providing a comprehensive range of high quality, accessible, and affordable educational opportunities; engaging in research and scholarship that expand the boundaries of current knowledge; and providing knowledge-based programs and services that are responsive to the needs of the citizens of the state and the nation.

USM Overview (Fall 2022)
Undergraduate Students: 125,615
Graduate Students: 37,008
Faculty: 16,559
Staff (various categories): 23,792
Facilities: Nearly 120 sites
Buildings: Nearly 1,000, including 20 libraries
Operating Budget: $5.9 billion (FY 2022)

Governance
USM is led by Chancellor Jay A. Perman, MD. The System office, which he oversees, is the staff to the Board of Regents. System staff advocate on behalf of the 12 USM institutions, facilitate collaboration and efficiencies among the institutions, and provide information about the system to the public. With leadership from the USM Board of Regents and Chancellor Perman, the System office coordinates academic programs, assists with long-range planning and resource management, facilitates private fund raising, and provides financial stewardship. The work of this grant will be done within the USM Office of Academic & Student Affairs, home to both the Kirwan Center for Academic Innovation and the University System of Maryland and Affiliated Institutions (USMAI) Library Consortium. The major responsibilities of the Office of Academic and Student Affairs include academic innovation, academic planning and accountability, academic policy, articulation, and faculty affairs.

The Kirwan Center is the System office's hub for academic innovation. Its mission is to leverage the power of multi-institutional collaboration to implement, evaluate, and scale and sustain innovations aimed at student success. The Center leads the statewide OER initiative, the Maryland Open Source Textbook initiative (M.O.S.T.), which began in 2013 to provide opportunities and support for faculty and institutions to explore the promise of open educational resources (OERs) to reduce students' cost of attendance while maintaining, or perhaps even improving, learning outcomes.

USMAI serves the 19 libraries of the University System, the Regional Higher Education Centers, and affiliated Maryland institutions. With historical roots in the state's university system, the consortium now includes libraries of both public and private institutions. Its purpose is to support effective access to library resources, provide and promote a range of services, leverage expertise, and maximize benefits to the individual libraries of the member institutions.