

# From Passion Project to Strategic Plan

Sustaining an OER Initiative in an  
Academic Library




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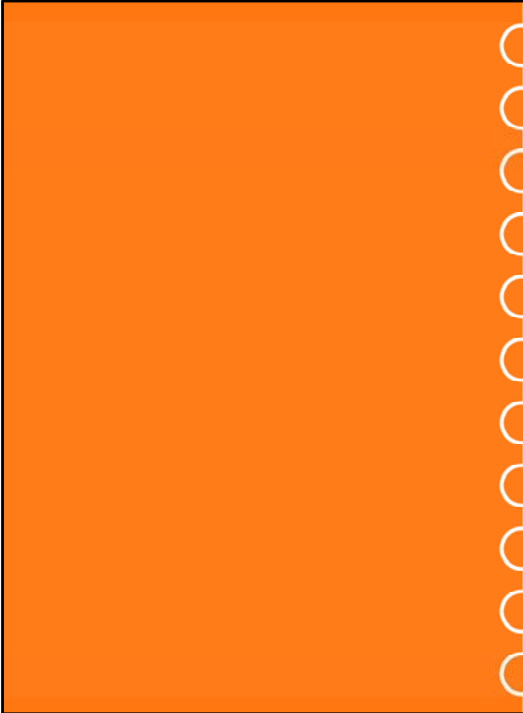


Welcome! This presentation will describe how the Performance Improvement/HPT model was applied to improve an Open Educational Resources (OER) initiative at an academic library, as an example of how HPT might be applied to improve scalability and sustainability in other OER programs.


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- Context of the project
  - Human Performance Technology
  - Open Educational Resources
  - HPT at OpenOKState



We will share with you a bit about the context of our project, present a brief overview of Human Performance Technology and Open Educational Resources, and share how we used the Human Performance Technology framework to shift the OSU Libraries OER initiative from a passion project to a strategic plan.



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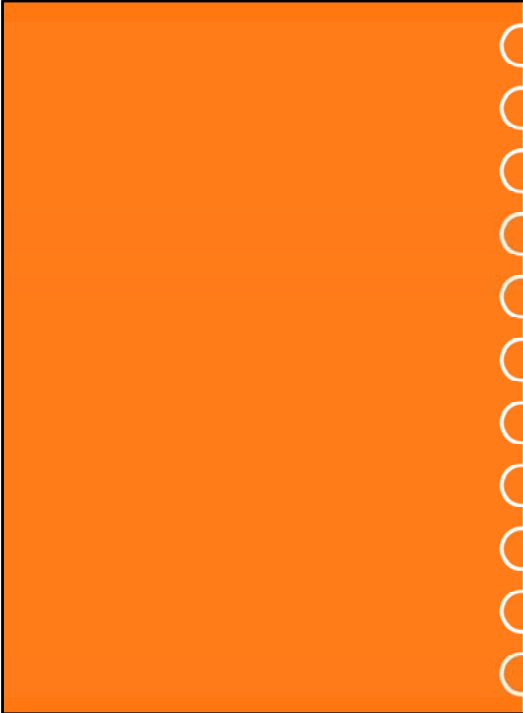
‘Context of the Project’




## Context of the Project



The project itself was the capstone project for a graduate level course in Performance Technology. The gifted professor encouraged students to apply the techniques and strategies they learned throughout the course to authentic, real-life situations. Kathy had recently accepted a position with the OSU Libraries as the Open Educational Resources Librarian, and Frances had previously been a Librarian at Carnegie-Mellon (*confirm this*). The two of them opted to collaborate to apply the HPT process to the OER initiative at Oklahoma State University Libraries. Although the project was not originally envisioned as a research case study for publication, we sought and received institutional review board approval to analyze archival data from the project once we realized our experience might be of use to a wider audience.

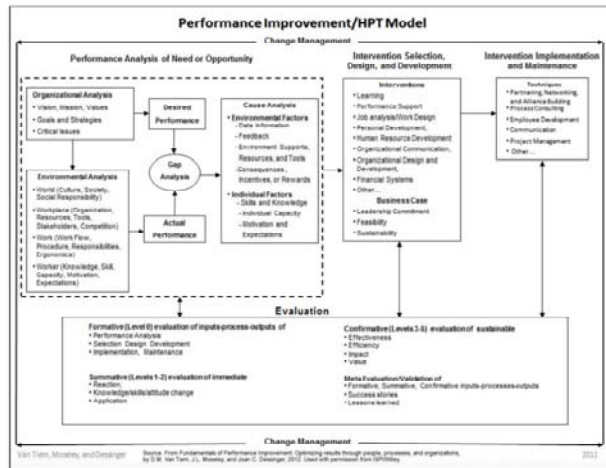


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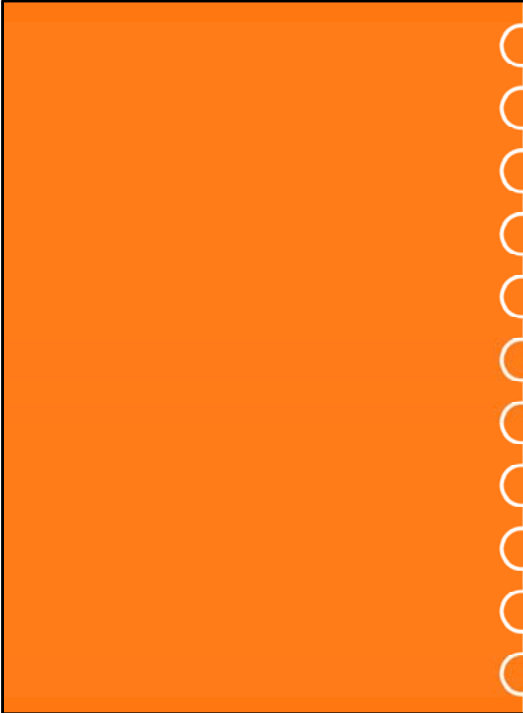


'Human Performance Technology'


# Human Performance Technology (HPT)



“Human Performance Technology is a ‘process that bridges the gap between what is and what should be in human performance systems’ (Wilmoth, Prigmore & Bray, 2002, p. 16) through a systematic approach including performance analysis, cause analysis, intervention selection, intervention implementation and evaluation. (Dr. Penny expand here, probably)



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'Open Educational Resources'

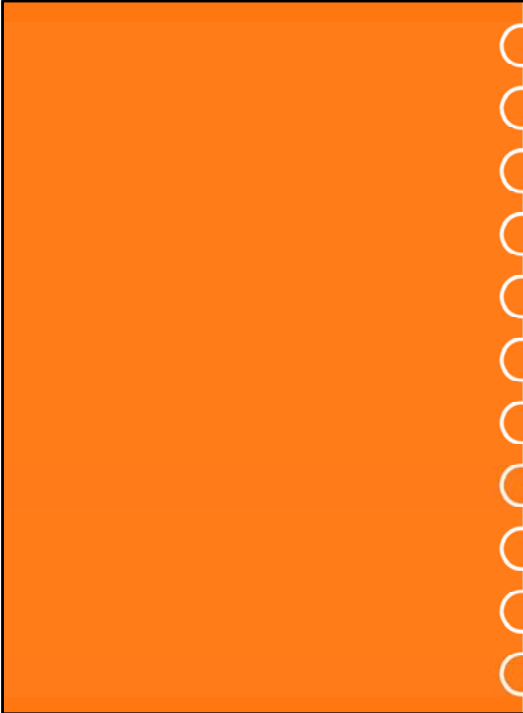
# Open Educational Resources (OER)

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Open Educational Resources are teaching and learning resources intentionally created and licensed such that they can be disseminated, modified and retained at no cost to the end user. They can be shared with others, adjusted and customized to meet the needs of particular courses, and can help foster an environment in which students create and contribute work with potential impact beyond the classroom.



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'HPT at OpenOKState'



**OSU** LIBRARY

Oklahoma State University is a high research institution with an enrollment of more than 35,000 undergraduate and graduate students. Its main campus is in Stillwater, Oklahoma, smack dab in the middle of a state in which it feels like not very much money is invested in education. Over 80% of the students receive some sort of financial aid, a great deal of which is based on financial need.

*“...personal mission to lessen the exorbitant costs of college textbooks for students at colleges and universities.”*



One of the OSU Librarians, concerned about the impact the cost of course materials was having on students, made it his personal mission to advocate for the use of OER at Oklahoma State University. In partnership with a graduate student and other faculty members, he led efforts to educate both students and faculty about related issues. In part because of his efforts, the Library received a significant one-time financial donation from a private donor. The donation was used to provide incentive for faculty to author textbooks to be licensed as open educational resources. The textbooks were housed as static PDFs in the Library website for use in associated courses. Due to a death, a graduation, and an unexpected move, the Library found itself needing to replace the entire team associated with the OER initiative. Having experienced mixed success with OER projects thus far, the Library opted to hire a full time OER Librarian tasked with transitioning the initiative from a series of passion projects to a program with a structured strategic plan.



Kathy was a bit overwhelmed, her degrees and experience were in music education and educational technology, but the other librarians gave her a cardigan and told her to jump on in. *(In other presentations this slide has brought a chuckle and given people permission to move on from the gravitas of the death.) (Another aside, In librarian world, the cardigan is considered a cape, like with a superhero.)*



It is common for academic librarians to perform an environmental scan when developing new projects and plans. An environmental scan serves to help the organization understand its current resources, processes, and needs. It may also include exploration of available technology and staff, as well as consideration of motivations informing the project. As Kathy stepped into the position of OER Librarian, she determined that although an environmental scan would be useful, the systematic framework of the HPT process was more suitable for the complex environment of the OER initiative and would help determine and support implementation and evaluation of interventions most likely to contribute to the type of resilient, sustainable OER program the Library hoped to provide.

## Slowing Our Roll

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- Living in the passion project
- Operating without a plan
- Operating without metrics
- Absence of accountability

Kathy went to her boss and asked for time to apply the HPT framework to the OER initiative. They discussed the approach the Library had been taking and he agreed there was value in taking some time to recalibrate.

## Aligning to Institutional Values and Goals

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**OSU** LIBRARY

Kathy partnered with Frances and they began with an organizational and environmental analysis. Their goal with the organizational analysis was to determine whether or not the values, mission and vision of the OER initiative aligned with those of the OSU Libraries. They examined publicly available documents, such as those relating to mission and vision on the OSU website as well as the more specific mission and vision stated on the website of the OSU Libraries. As examination of these documents revealed the central role of faculty at OSU in determining and setting policy, they examined the faculty handbook and read through the publicly available minutes from the previous two years of faculty council meetings. With their permission, Kathy kept observational notes as she reflected on meetings, events, and conversations with other librarians. Alignment from the process perspective was determined through a review of literature related to Open Educational Resources.

## Analyzing Performance

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Having determined an overall supportive environment, we turned our attention to the gap analysis. Using a framework describing characteristics of stages through which OER programs might progress to achieve the ideal state, we determined Evolving to be the desired state of the OER program. To analyze the actual performance of the OER initiative we adopted an attitude of “appreciative inquiry”, through which gaps in performance are seen as opportunities to improve, and places where gaps do not exist are celebrated as successes. Data regarding the actual state of the initiative were gathered from existing documents, artifacts, interviews and conversations. We used a six-cell gap analysis as recommended by Van Tiem to compare the actual and ideal states.



## Determining Cause

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Next we considered environment and behavior to identify possible causes of the gap in performance. The librarian whose passion had initiated the projects had built personal relationships and allies, but documentation of the projects was scattered and incomplete, with no formal system of accountability or follow up having been established. We determined that, although steps had been taken to initiate and explore the use of OER, a structure had not been established through which the program could evolve and mature.

## Selecting Interventions

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According to van Tiem et al., 2012, intervention selection is “the process of identifying and recommending the most appropriate activities to successfully resolve a performance improvement problem” (p. 197). We reached out to the Library administrators, scholarly communications librarian, assessment librarian, and the libraries’ instructional designer. Together we determined appropriate interventions would include improvement in staffing, infrastructure specific to the library’s OER initiative, long-term strategic planning, and establishment of a campus-wide OER working group. These steps are underway.

# Evaluation

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Formative evaluation of the effectiveness of the interventions is ongoing, with a more comprehensive summative evaluation of their effectiveness scheduled for February. At that point the OER team will once again use the six-cell analysis to determine possible gaps in performance.

## Lessons Learned

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Lessons learned: The rigor and clarity of the HPT process provided the measurable documentation and support administration needed to justify allocation of resources needed for implementation and evaluation of our suggested interventions. We found its application to the complex OSU Libraries OER initiative appropriate and beneficial, and anticipate continued iterations of its implementation will inform the growth and sustainability of the OSU Libraries OER Program.

Thank you for  
joining us!

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**OST** LIBRARY

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