

# The Future of Open Education at Thompson Rivers University:

## A call for further consultations

Submitted on behalf of the Open Education Working Group

By

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# Table of Contents

Prologue (24 October 2022) .....	3
Introduction .....	5
Background: History of OE at TRU .....	6
1. The Structure of OE Support .....	8
Open Learning .....	8
Library .....	10
Centre for Excellence in Learning and Teaching (CELT) .....	11
Office of the Vice-President Research (OVPR) .....	11
TRU Students Union (TRUSU) .....	11
Open Education Working Group (OEWG) .....	12
2. Stock Taking: Current OE Activities .....	13
Surveys .....	13
Faculty survey summary .....	13
Student survey summary .....	14
Williams Lake Campus .....	14
Open Education Resource Development Grant (OERDG) .....	15
UN SDG Faculty Fellows Partnership Open Pedagogy project .....	16
Communities of Practice .....	16
3. External Scan .....	17
Structure of OE support .....	17
Policies .....	18
Successes .....	19
Challenges .....	19
Future .....	20
4. External Funding .....	21
5. Conclusion and Discussion of the Future of OE at TRU .....	21
Appendices .....	25
A: BCcampus reports .....	25
B: Reports from Division/Units .....	25
C: Surveys .....	25
D: External Interviewees .....	25

## Prologue (24 October 2022)

This report is a snapshot of the historical and current activities of Open Education (OE) including supports as of April 30, 2022. It was requested by and submitted to Donna Murnaghan, Acting Provost and Vice President Academic. As the title suggests, *The Future of Open Education at Thompson Rivers University: A call for further consultations*, the report was commissioned to inform the university community of the state of OE practices at TRU and abroad with an eye to ensuring they evolve in step with the goals of the institution.

The context of this report, however, has shifted somewhat with the arrival of Dr. Gillian Balfour as our new Provost and Vice-President Academic, and the evolution of the Integrated Strategic Planning (ISP) process. Nevertheless, the ISP has led to the establishment of three Strategic Priorities for TRU moving forward, all of which provide opportunities – and demonstrate the continued need – for the growth and development of OE initiatives across campus. Given the new ISP framework, the authors provide this update to outline how OE is supportive of these strategic priorities:

### **Strategic Priority: Inclusive excellence in faculty and staff recruitment and retention.**

Open education practice – particularly the areas of open publishing and open research – have a part to play in the recruitment and retention of new tripartite faculty under this strategic priority. As the tri-council funding agencies require open mandates and requirements for grant recipients, supporting new faculty with these expectations will be necessary. Further, as these grants increasingly also centre the importance of knowledge mobilization, the open suite of tools to support open publishing practices like scholarly blogging and podcasting are well-placed to support this work. The open community at TRU has the necessary expertise to do this work well.

### **Strategic priority: Student wellness and belonging will enable us to achieve the change goal of eliminating opportunity gaps, and Honouring Truth Reconciliation and Rights.**

The use of open educational resources dramatically reduces costs for students and is often seen as an accessibility issue from a means perspective. Open education practices, however, also offer flexible modality that can accommodate more learner needs and the opportunity for localization unique to the community needs, including Indigenous community needs. We also note that Paul Michel, Special Advisor to the President on Indigenous Issues, is a strong supporter of OE.

### **Strategic priority: By 2033, TRU will be highly ranked provincially, nationally, and internationally for its unique academic and trades programs, that provide students with flexible learning pathways into research informed curriculum and experiential opportunities.**

Open resources and pedagogies – as well as a supportive open technology infrastructure to underpin it – have been a key source of recognition for TRU up to this point, not only regionally through BCcampus but also internationally via organizations like Open Education Global. TRU

faculty and staff are involved in disseminating their work in open education at all levels, and in doing so they showcase the flexibility and adaptability of our practices and curriculum.

While the submission of the report, endorsement of the institutional stakeholders, and its release by Dr. Balfour represents the end of this work for the OEWG, it more importantly marks the beginning of the next phase of OE at TRU, namely, how does the institution proceed?

The recommendation of the final report, a call for broad consultation with this report serving as a background, remains a valid next step. The only question remains, which institutional stakeholder will be the champion? With minimal institutional support for OE activities budgeted in the upcoming fiscal year, now is a moment to embrace the strong history of Open Education at TRU, envision its future in its entirety, i.e., open research, open publishing, open pedagogy, and open educational resources, and create a comprehensive support network to launch TRU into the next decade as a provincial and national leader. The authors note that through the work in creating this report, there was an overwhelming source of pride in the work accomplished at TRU in the past and a real interest in ensuring its continuation in the future.

The authors of this report look forward to the new ISP projects and budget planning processes as an opportunity to secure a sustainable future for Open Education so that it, in turn, can support the work of faculty, students, and staff in the areas of inclusive excellence, wellness, and recognition.

## Introduction

This report is presented to the Provost and Vice-President Academic of Thompson Rivers University (TRU) on behalf of the Open Education Working Group (OEWG). The report compiles information from a variety of internal and external sources about open education practices (OEP) in higher education institutions. Its purpose is to document OEP creation, development, and maintenance at Thompson Rivers University and to provide a starting point for discussions to establish a sustainable support system for the future. The report also documents open education (OE) support structures developed at other Canadian universities to provide a comparative analysis and insights into other practices to help frame future practice and how these initiatives are funded.

The report is organized into sections based on the terms of reference provided. Section 1 is a description of how OE support is structured. Section 2 is a stock-taking analysis of efforts at TRU. Section 3 reports on issues and trends, provided by an external scan of other institutions. Section 4 provides a discussion about external funding resources to support OE initiatives. Section 5 highlights issues for discussion about the future of OE at TRU.

OEP are defined in this report as the four elements of the open educational resources, open access publishing, open research, and open pedagogy and practices. This definition specifically excludes the concept of [\*open admission\*](#), which is a much broader institutional policy of accessibility of student enrollment. Where OEP may support the policies that further enable open access, they can and do exist within institutions that are not “open admission”. In fact, OEP are found throughout all higher education institutions to some degree, whether through individual staff and faculty practices, or supported and encouraged through senior institutional administrators.

The Open Education Atom



As is typical of OE activities, this report was conducted in addition to the regular workload of all involved. As will become apparent not only at TRU but with few external exceptions, there is little dedicated institutional support for the development, implementation, and continued operation of OE activities at Canadian institutions, despite their importance to student priorities like affordability, accessibility, and equity, and to faculty priorities like academic freedom, content relevance, and capacity for indigenization and localization. The authors of this report therefore greatly appreciate the efforts of those consulted in the drafting stages to conscientiously document the activities that are completed to support OE, to participate in interviews, to provide feedback and guidance, and to otherwise participate in the creation of this report. The period of drafting this report, including all consultation time, was three months.

Given the time frame under which this report was drafted, and the structural issues illustrated within, this is not a comprehensive document. It does however bring to light many of the obvious and hopefully some of the more hidden features of OEP at TRU which are: OE is a core value of

many members of the TRU community and that much of the work to support OE is not recognized as such. The report outlines models of OE support that exist at some Canadian universities without claiming to be exhaustive and where TRU fits along this continuum with the associated strengths and challenges.

In the end, what this report does offer to the Provost's office and the university community as a whole is a celebration of the multifaceted manifestations of OEP at TRU, a university with a rich and internationally recognized tradition of work in these areas. What is contained within represents a contemporary understanding of the strengths of OEP at TRU, a clear-eyed analysis of the challenges in supporting this work, and directions for discussion towards establishing a sustainable future for OEP at TRU. We hope this report becomes widely circulated and forms the basis for future discussions.

## Background: History of OE at TRU

Thompson Rivers University, through the efforts of committed stakeholders and Open Education enthusiasts, has a reputation of being a leader in the development of OE activities. This commitment to OEP is embedded in the DNA of the institution, dating back to the merger of BC Open University and the University College of the Cariboo into what would become TRU in 2005.

TRU's Open Learning (OL) division has a history of over 40 years of OE initiatives and supports the culture of Open across the institution. Its [on-going mandate](#) to meet "the open learning needs of British Columbia" has expressed itself in a rich array of initiatives but is largely represented by providing open access to post-secondary courses to all residents of BC. OL's unique position as a post-secondary division specifically to develop and deliver open learning opportunities throughout the province, e.g., relevant curriculum, has enabled its staff to develop specific expertise in all aspects of OEP. Initially, content was developed and delivered in distance modalities that ranged from TV (the Knowledge Network) to mail based correspondence courses. Today, most courses are delivered by computer over the internet with limited direct student contact: continuous, self-paced. This high-level online teaching and learning expertise serves the entire TRU community, as evidenced during crisis moments like the COVID-19 alternative delivery experience of 2020-21 and in the day-to-day expansion of OE practices among campus faculty.

To access an [interactive timeline, developed by the OEWG, which provides a brief history OE at TRU](#) and briefly scroll down the page. Of note is the national and international reputation-building reflected in the case-studies in the timeline. Since the timeline was developed, OE advocates at TRU have continued to earn accolades from organizations here in BC and around the world. For example, over the past two years, five current TRU faculty and administrators have received Awards of Excellence in Open Education by BCcampus: Izabela Mazur, Christine Miller, Brenda Smith, Brian Lamb, and Michelle Harrison. In addition, the first such award went to Irwin DeVries when he was AVP-Open Learning. Furthermore, TRU community members were cited for three major awards at the OE Global conference in 2022:

- [Open Infrastructure Award](#) to the [OpenETC](#), a cross-province collaborative project largely housed at TRU and developed and maintained by Brian Lamb and Troy Welch.

- The Open Reuse/Remix/Adaptations Award to 25 Years of EdTech, a podcast companion to the book by Martin Weller, with participants from around the world, including Brian Lamb and Brenna Clarke Gray at TRU.
- The Open Innovation Award to the open picture book *Together*, developed by the Global OER Graduate Network; TRU's Verena Roberts is a co-author on the project.

TRU also has and continues to make a significant contribution to the development of open texts and other OERs for use around the province and beyond. According to BCcampus (see reports in Appendix A), TRU faculty have produced 14 OER that are currently available in its open text collection. These OERs have reportedly been adopted by 20 institutions in 67 different instances and downloaded 3,673 times since November 2021. And since creating OERs for courses, BCcampus estimates that TRU created texts have save student over \$2.5 million in material costs ! As a result, BCcampus recognizes TRU as one of the Top 5 institutions in both adopting and supporting student savings in BC.

Additionally, BCcampus reports that TRU faculty and staff have collectively held \$300,000 in BCcampus grant money for OER and ZTC development across 23 successfully completed projects. TRU's development work in this area does not rest on developing traditional textbooks, either; BCcampus' H5P OER development grants have gone to TRU teams in both funding cycles, with two TRU-involved teams awarded grants in 2020 and one in 2021. These grants fund the improvement of existing OERs with the development of interactive activities. This demonstrates both past successes and continued innovation of the TRU community's commitment to expanding access to OER for our learners and those outside TRU's walls.

In addition to externally-funded projects like these BCcampus grants, through TRU's Open Education Resource Development Grant (OERDG) program, have supported TRU faculty in the development of approximately 22 other resources that are available through its own [Pressbooks catalogue](#). These resources are used internally in specific courses and can be shared with others and encompass textbook offerings in such areas as Nursing, Chemistry, Sociology, Biology, Math, Tourism, Economics and Adult Special Education. The OERDG is exhausted every year, with more applicants than can be funded. The faculty commitment to developing affordable and accessible resources is evidenced by the high level of interest in this grant program, as well as faculty commitment to using other funds to develop OERs, e.g., the Return to Campus grants used to develop OER in Geology and ESTR.

## 1. The Structure of OE Support

Open Education activities are supported in a decentralized structure across TRU, primarily via staff and faculty working in Open Learning Division (OL), the Library, the Center for Excellence in Teaching and Learning (CELT), the Research Office, the TRU Students' Union, and the Open Education Working Group (OEWG).

Below are highlights of the reports provided by each of the primary bodies. The complete reports are attached in Appendix B.

### Open Learning

OL, as result of its origins, course development processes, and the expertise of its personnel, provides the greatest amount of OE support within TRU. With OE built into its organizational DNA through its open access mandate and supporting policies, OL has established systems that encourage and support the implementation of OEP in its courses. This orientation spills over into the campus-based activities because there are many faculty that work directly with OL. In addition, Instructional Designers provide project and service support to campus-based OE initiatives. Furthermore, the Learning Design and Innovations group have dedicated resources that almost exclusively support campus-based educational technology needs in the form of the Learning Technology team, and OL supports campus-based development through its significant expertise in editing, copyright, and production of OER and open pedagogy platforms. The association between OL and OE is so strong that some associate one exclusively with the other.

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*The support from TRU by IDs, editors, copyright etc has been extremely positive and helpful, and for me, critical - I don't think I could create anything of the same quality without that support.*

*Comment from Faculty survey.*

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This is a misconception as campus-based faculty have a long history of developing and using OERs, employing open pedagogy in courses, and leading in the implementation of open publishing and open research. What is certainly true is that without the support of OL personnel in the design, support, and production of OER, the vast majority of projects that have defined the positive reputation of TRU as a leader in OEP would not have been completed.

Based on the complete report from OL, the degree of support is described and measured in various ways.

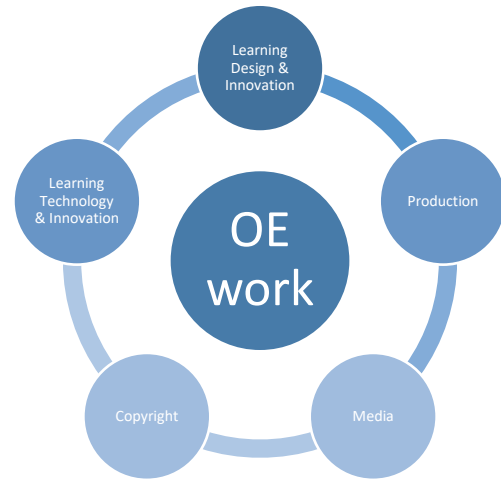
The Learning Design and Innovation team provides many different support services: media development, production, and research and implementation of OE platforms. This work is ongoing and includes support and operations services such as system integration and security. Typical services provided:

- Consultation for planning the project.
- Input into platform and tool selection.



- Arranging assistance with theming, plugins, special features. In some cases, this ends up being referred to Production/Media.
- Ongoing assistance – usually in the form of meetings and support questions as needed, sometimes hands-on fixes. Those undertaking OE projects also have ongoing access to office hours staffed by the Coordinators, Educational Technologies, for advice and support.

Figure 1. Typical OE support groups within OL



Some successful projects include:

- [Indigenous Stock photos](#)
- [Faculty led – projects](#)
- [OER resources](#)

The suite of platforms available to TRU faculty using OEP is also significant and includes internally supported installations of WordPress and Pressbooks, which allow faculty to choose how their work will be developed and shared, as well as supported access to a range of tools from ebooks to podcasts with entirely open tools. Institutions like Kwantlen Polytechnic University (KPU) refer to these resources as an “Open Publishing Suite” and celebrate them as significant offerings. TRU’s development of these tools extends to innovation in form-based authoring (to allow for easy student and community participation in OE projects) and is extended to the province through the award-winning work of the [OpenETC](#).

An estimate of the cost of providing all services is approximately \$78,000 per year.

OL Instructional Designers have led a number of different OEP initiatives in both workload and service. In workload they guided development teams in the implementation of Zero Textbook Cost courses and the Associate of Science program. As faculty members, IDs with Tenure or on Tenure Track contracts are required to complete service work. Currently, IDs choose to dedicate significant service to support OE. An estimate of the equivalent of one full-time position through service to the institution is provided annually to deliver workshops, work on OE projects and lead institutional initiatives.

The Coordinators, Educational Technologies and Learning Technologist roles are also housed within Open Learning but are tasked with supporting campus faculty initiatives. OE projects, from pedagogical design to technical issues, are often supported by the faculty and staff employed in these roles. In addition, the Learning Technology support materials produced by this office are released openly with CC-BY-NC licensing and are frequently used by colleagues at other institutions.

Within the OL Development and Delivery unit, the editing and copyright teams provide significant support to virtually all the OER projects. Typically, OERDG grant holders utilize the

services of the editors to review content for readability, structural coherence and grammar. Editors are also engaged directly by faculty who have received grants from BCcampus and/or Zero Textbook Cost course writers as they convert content to OER; this resource is consistently cited by faculty as a critical component of successful OER development. From the period of April 1, 2021 to March 31, 2022, for example, editors were involved in 14 OER projects and contributed 1,500 hours of work or almost one FTE at 35 hours per week. The financial contribution is estimated at \$52,500.

These offerings from OL are not comprehensively recognized in the budgeting of most projects undertaken and are a service OL provides to the community. The sustainability of funding for this work needs to be considered as we look to the future of Open Education at TRU.

## Library

The library provides active and important OE support in all areas of OE. It is vital in helping faculty and students find, store, and access open resources, research, and other materials that facilitate OE initiatives.

The TRU Library has a full-time tenured Librarian II, Brenda Smith, who serves as the Open Education Librarian. She promotes the use of OERs to faculty and assists them in identifying and evaluating relevant OERs. Brenda maintains an extensive library guide (LibGuide) on the [Open Education](#) website and has been particularly active in OER development, Zero Textbook Cost course information collection and dissemination, and Open Pedagogy. Brenda participate in the UN SDG Open Pedagogy Faculty Fellowship Program and in the Open Pedagogy Talks, a joint venture of TRU, University of Calgary, University of Alberta and UBC. The library also has a tenure-track Librarian I, Erin May, who serves as the Scholarly Communications Librarian. Her role in scholarly communications includes managing TRUSpace (TRU's OA institutional repository), TRU's participation in Borealis (the Canadian Dataverse repository), and the libraries instance of Open Journal Systems (OA journal publishing platform) Erin maintains LibGuides on Open Access, TRUSpace (TRU's open access digital archive), and Creating and Running an Open Access Journal; this work support faculty with both Open Publishing and Open Research.

Due to TRU's membership in the Canadian Research Knowledge Network (CRKN) and new transformative "read and publish" agreements with publishers such as SAGE < TRU researchers, faculty and student my published their articles as Open Address with no or discounted article processing charges (APC).

The Library is also the contract holder for the [Open Education Resource Development Grant \(OERDG\) project](#). The OERDG is the fund that directs monetary and other support services to faculty members for the creation of OER and is coordinated by the OERDG Grant Coordinator. The project was initiated in 2018 and has supported 36 grant recipients to produce a variety of textbooks, ancillary resources, and other forms of OER. The grant is the only institutional funding for OE activities provided by TRU and is not guaranteed annually, but the commitment of stakeholders across the institution has ensured its continued success despite its precarious structural position regarding funding. Specific information about the grant is available later in the report.

### Centre for Excellence in Learning and Teaching (CELT)

CELT has been a partner on the OERDG since the initial 2018 round. As part of the steering committee, they support the design of the grant program, call for proposals, selection, and monitoring. They are also involved in the onboarding and support of faculty members. The director also collaborates with the OERDG Facilitator in the scheduling and promotion of workshops, answering procedure-related questions, and monitoring interim and final reports.

While CELT receives no funding support for its OE support activities, in 2021 it reallocated \$27,644 of unused core funding towards the OERDG program. This was used to support the funding of Round 2 of the grant program, which would not have been possible without CELT's commitment.

### Office of the Vice-President Research (OVPR)

The Office of the Vice-President Research provides information and support in the Open Research area. Its services are provided in particular by the Office of Student Research and Public Engagement, by staff members and student research assistants, with financial support via external grants and internal funding.

With the emergence of Tri-Council Research Funding criteria including a need for applicants to demonstrate open research methodologies, including data management, the RO and Library are co-leading the development of Data Management systems that meet the required criteria. Toward this end, federal funding assistance from a \$400,000 NSERC EDI grant has brought on a postdoctoral fellow for a two-year term. In addition, TRU "Return to Campus" funding (2021-22) provided OL faculty release time and student research assistance to work on the open access Canadian Undergraduate Research Network (CURN).

Joint projects currently underway include development of an online, open access, international version of TRU's Knowledge Makers Program, in collaboration with the United Nations; further development of the CURN site, with future participation from the US-based Council on Undergraduate Research (CUR); and the possible partnership with BC Wildfire for the development and delivery of the Province's wildfire training.

There is anticipation of growth of open supports for research-integrated projects, given that Tri-Council Research Funding increasingly requires not only open research practice, but open publishing. Supporting this work will be important going forward. The OVPR has also recently expressed a commitment to working with the OERDG grant committee to secure project funding for research on open learning, open educational resources, knowledge translation, and knowledge mobilization. Beyond a service and project focus, the OVPR is encouraging development of a provincial and national leadership role, with OL asserting a research commitment to the study and design of open education and open educational resources.

### TRU Students Union (TRUSU)

TRUSU have long advocated for the development of OE practices and especially OER. In 2017, TRUSU submitted a proposal to Senate to start an Open Education Resource Development Grant program modelled after one at Kwantlen Polytechnic University. Along with a detailed program

model, TRUSU continued to ask TRU to provide support to those working in creating more OER through the ‘Open Textbooks’ campaign that collected over 1,800 student signatures between 2016 and 2018.

Since that time, TRUSU has partnered with the Open Education Working Group on internal education and advocacy work and has taken the lead on some projects like Open Education Week in 2020. TRUSU rates the implementation of OER practices consistently in the top five issues for students at the university because of equity and affordability issues, and in our site scan the commitment TRUSU shows to Open was cited specifically by BCcampus as notable within the province. A support letter from TRUSU is attached along with the unit reports in the appendix.

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*“TRU Open Education working group is doing a fantastic job - promoting open practices, educating faculty, supporting grant awardees etc - **more support is needed from TRU Administration to keep encouraging these important activities, and due recognition given to Faculty who spend hundreds of hours creating or modifying OERs”.***  
*Comment from Faculty survey*

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### Open Education Working Group (OEWG)

The mandate, as provided by the previous Provost, of the Open Education Working Group is “to foster and support a culture of Open Education (OE) initiatives at TRU.” The OEWG seeks to develop, coordinate, and support sustainable OE initiatives and collaboration amongst departments, divisions, faculties, and schools at TRU for both campus and online delivery. Membership in the OEWG is open to anyone at TRU who is interested in open education. The OEWG actively encourages key stakeholders from across TRU to participate to best represent the breadth of supports and interests across the institution.

The OEWG is a faculty led group that receives no institutional support. As such, it is reliant upon interested faculty, administrators, and staff to provide their service or time to drive the collection of information and other initiatives forward.

The OEWG has in the past number of years been instrumental in organizing opportunities for faculty to participate in open pedagogy practices, such as the [UN Sustainable Development Goals Faculty Fellow Partnership Project](#), as well as to share information about OE in four different communities of practice. It also has partnered directly with TRUSU and the Library during events such as Open Education Week and at Open Houses.

In summary, these six different entities connect in various ways to meet very specific but distinct goals. This is the essence of a decentralized system. It works well to direct energy at specific operational issues at a particular moment in time. Its challenge is that on-going sustainability of this support energy is entirely dependent on the individuals in place.

## 2. Stock Taking: Current OE Activities

As a stock-taking exercise, the OEWG distributed surveys to students and faculty. The surveys were open between March 1 – 20. The complete survey results are shown in [Appendix C](#).

### Surveys

Once created, distribution to faculty was through the Faculty listserv, which reaches all faculty members, and through the OEWG listserv, which reaches the subset of interested faculty. The student survey was distributed through TRUSU to students directly, by instructors posting a link to the survey into their course in the LMS, and with social media pulses from TRU World staff and TRU Student Life.

### Faculty survey summary

In total 40 faculty responses were collected. All faculties were represented except Trades and Technology. Campus faculty accounted for 29 responses and Open Learning Faculty Members (OLFM's) were 11. There was likely some bias in the response due to the most active respondents also being OEWG members, given that most respondents indicated they were familiar with OE and 68% indicate they had used OER in a course. The primary reason indicated for using OER was to increase affordability and availability of material for students and to improve their control over the course content.

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*"It improves access and cost for students. Improves control over course content for instructor".*

*Faculty Survey respondent*

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Of those using OERs, 40% indicated they would adapt an existing OER and 33% would create one. Of the 32% of those not using OER, none being available or available resources being of poor quality was cited as the reason by 44%, which speaks to the importance of funding the continued development of high-quality resources across the disciplines.

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*"I have benefitted from TRU funding. More funding would be a good idea".*

*"We are currently building an OER text and an OER supplement in our department. The supports from the OER group on campus, especially including the funding for a research assistant have been invaluable".*

The most requested support for those thinking of creating an OER is:

- Content workshops (47%)
- Course release (45%)
- Session on technology (45%)

OLFMs indicated a desire to participate in OER creation, but do not have a model or payment mechanism to do so.

*"I have yet to find any OER materials for the various topics that I teach that are of sufficient quality that I would adopt/adapt".*

Open pedagogical practices are used by 25% of respondents, and 42% indicated they publish and

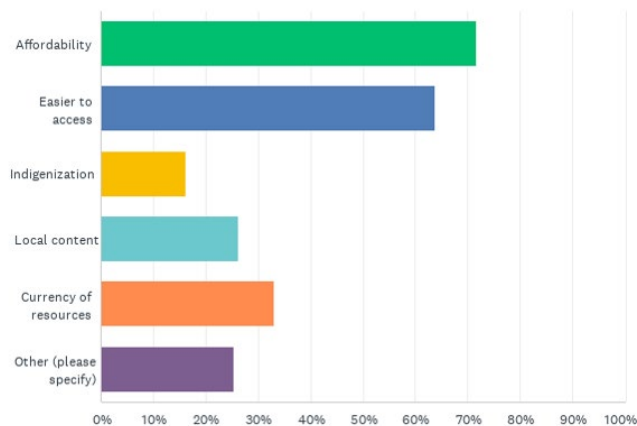
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*Some comments from faculty respondents*

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share data openly. We anticipate significant growth in the latter category, given the shifting priorities of most national funding bodies towards open.

Three themes emerged in responses relating to participant experiences in the creation and/or use of OERs: funding, support, and quality. Funding was generally appreciated but considered inadequate. Support was acknowledged as essential to completing a quality OER and thoughts of using different team approaches provided. A number of faculty expressed concern about the quality of OERs in their discipline and that was the reason for not considering its use, which suggests the importance of resourcing both the work of OER development and the critical support functions like editing and production.



#### Student survey summary

Total responses received was 156 with Arts (37%), Science (29%) and SoBE (20%) representing the top faculty voices. Open Learning students accounted for 62% of responses and this may be correlated to high response rate (71%) of students having accessed an OER in courses. Although overall 35% of students indicated that less than 25% of their courses used open resources. Students valued open resources for affordability (71%), Ease of Access (63%), Currency (33%) and Local Content (26%). This was reinforced through the open-ended responses where topics of affordability and accessibility were the largest positives. Where critical comments were made, they related mostly to the quality of the resources and the lack of them.

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*“Needless to say it makes a tremendous difference when forming a decision to pursue a desired path in education for students to save hundreds of dollars in not needing to buy much needed books and supplies”. Student survey comment*

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When asked if they have chosen not to take a class due to not being able to afford the assigned materials, 74% indicated no. However, 35% also indicated that they have delayed purchase of the material to the point where their ability to succeed in the course was impacted.

Also of interest was that 60% of students stated they enjoyed assignments that required them to use open pedagogy practices to share their knowledge in the community. This aligns with general research findings that students prefer “authentic” assignments that engage community stakeholders.

#### Williams Lake Campus

The Williams Lake campus reports that it is significant user of OERs as staff assist students to find and access open resources that are appropriate. Staff have even created a resource, Citing Sources in APA Style: A Nutshell Guide, to aid student use. In another instance a faculty

member applied for a TRU OER Development Grant but was unsuccessful. That faculty member has continued to work on the resource but is hampered by a lack of institutional resources. Faculty have identified other content that could be replaced with OERs, but again cite a lack of funding and support as barriers to achieving this.

### Open Education Resource Development Grant (OERDG)

As indicated, OE at TRU is currently supported by people in a variety of divisions and units: Open Learning (OL), the Library, the Centre for Excellence in Learning and Teaching (CELT), and the Research Office.

The activities of these people intersect through the primary support program of OER creation; the Open Education Resource Development Grant (OERDG). Although there are increasingly more independent efforts in OER and OP practices on campus as evidenced by work beyond OER that has garnered recognition, the only specific internal program to fund this work is the OERDG.

This program was started in 2018 through a Strategic Initiative Funding grant. The initial proposal reinforced that “The OER Development Grant aligns with TRU’s mission and mandate at the highest levels,” citing not only from the contemporary Academic Plan and Strategic Priorities, but also from the Thompson Rivers University Act itself, which “explicitly states that the purpose of TRU includes the promotion of “teaching excellence and the use of open learning methods.” The initial grant provided was \$40,000 to support 6 faculty projects at \$6,500 each. As well as support travel for dissemination (\$2,500) and technical support offered by OL (\$5,000)

The grant program was subsequently supported through a two-year SIF grant in the 2019/ 2020 and 2020/ 2021 years. Each year’s budget was increased to \$79,000 to support 8 faculty projects at \$6,500 each, as well as a Project Facilitator at two section releases (\$15,000), faculty travel (\$4,000), and technical support from OL at (\$8,000). In each year of the grant offering, there has been an oversubscription of funding requests, and in fact, as the program has become better known over the years, the number of proposals per round of funding has consistently increased. For example, in the funding 2020/2021 year, 10 projects were funded while 21 applications were received. In these years, the Provost’s Office directly contributed \$25,000 to the budget for additional support of grant recipients to ensure their success; in 2021, this top-up came from CELT’s pandemic-related surplus budget.

An absolutely critical component in the success of the OERDG is the Grant Coordinator, who supports grant holders with the development of their projects and coordinates individual and group support. The resources developed by the Grant Coordinator are also accessed by those developing projects not funded by the OERDG, which makes the impact of the two-course release for the role significant to the overall culture of Open at TRU. Further, the Grant Coordinator organizes celebrations and recognition of the work developed under the OERDG, which assists in discoverability and impact of the projects.

It should be noted that despite the success of this program in increasing locally developed OERs for the TRU community, the funding has not been predictable or sustainable. As of March 20, 2022, a proposal by CELT for continued funding of the OERDG in the 2022/23 year was not approved as part of its operating budget. The proposal has been sent directly to the interim Provost's office for consideration. This proposal was partially funded with the intent of allowing the Program Coordinator to continue to provide support to the existing grant holders. No new funds were provided to support new grants being awarded.

The future success of developing OER at TRU is dependent on a predictable, sustainable funding commitment from the University.

### [UN SDG Faculty Fellows Partnership Open Pedagogy project](#)

[TRU entered into this project in May 2021](#). The project was initiated by members of the OEWG who now also form the part of project leadership team. Six faculty members participated in the initial cycle of developing sustainable assignments; the purpose of the program is for Faculty Fellows to work in interdisciplinary teams to create assignments that enable students to learn, but also to create local understanding about a particular UN Sustainable Development Goal. Students choose a Creative Commons license and post their work in a format that is accessible to the public. In this way, the assignments are also renewable because the knowledge created can be added to by students in future course iterations.

This project has recently added two partner universities from Costa Rica and Aruba and is poised for continued growth over the years ahead. It represents a unique approach to open pedagogy delivery while providing an experience of international collaboration with colleagues. It also aligns with TRUs local and global commitments to sustainability.

For reference, three samples of work come from:

- [Sharon Brewer, Chemistry](#)
- [Dawne Bringeland, Open Learning, Leadership](#)
- [Bala Nikku, Social Work](#)

### [Communities of Practice](#)

One issue that threatens the forward momentum of OE at TRU is the lack of a central organizing role to coordinate the work. The OEWG works to fill this gap, but more oversight, mentorship, and guidance is required for faculty than can be provided by this volunteer group.

In order to recognize community leaders in open and help to connect more people who are interested in open projects, the OEWG in 2021 created Communities of Practices (CoPs) to align with the Open Education Atom: Research, Publishing, Pedagogy, and Resources. The CoPs meet on a regular basis to support work being undertaken within the community, and while each CoP has a facilitator or two, the focus of each group is shaped by the membership. CoPs have only been in existence for one academic year but have already connected OE developers to global experts in open education, like a guest talk from the Open University's Martin Weller, and to experts in copyright, editing, and open platforms. The CoPs are well-placed for the growth of open at TRU.



### 3. External Scan

This section provides insight into how OE activities are developed and delivered in other institutions in BC, Alberta, and Ontario. Those interviewed were selected based on recommendations of the Future of OE Advisory Committee, who are people with strong knowledge of OE activities in Canada. Given time constraints, the list is representative of the Canadian OE environment, but does not claim to be comprehensive. The complete list of interviewees is available in Appendix D.

The interviews were conducted under the provision of preserving interviewee anonymity and, as such, what is presented below discusses the overarching general themes.

#### Structure of OE support

In the external institutions surveyed, OE was supported in both decentralized and centralized models; however, there were clear thematic similarities across programs, even given different institutional prioritizing of OE. In general, a Librarian or Teaching and Learning specialist has the role of supporting OE as part of their job description. This person (or people, where the work is shared) support faculty on an individual basis, offering guidance on open licensing as faculty express interest in adapting or adopting OER. Through these efforts, instructional support in admin, faculty, and staff roles build and create awareness about the “5R’s of Open”: the ability to Retain, Reuse, Revise, Remix and Redistribute content for educational purposes.

As implementation and awareness grows of OE, instructional faculty join the efforts of the instructional support in becoming champions of adopting or adapting open practices and may even apply for grants to create or adapt an OER. There is often parallel energy from student unions, who correctly see OE as a solution to equity and affordability issues.

However, as OE activities grow, additional dedicated positions to support OE are typically not increased; instead, others may become involved out of personal or professional interest. This typically leads the creation and continuation of the decentralized model, and this is where the “working on OE off the side of the desk” originates. This is particularly the case when the development of an original OER (or large-scale adaptation) is pursued, because each project requires a team in order to produce the content, operate the open text platform, create and integrate media, review copyright, and edit the document.

In the decentralized model, projects are driven by faculty interest, funding is generally not flexible to meet project timelines, and institutions may develop pockets of expertise within faculties based on the desire of faculty to work with OER, but this ebbs and flows.

A centralized model develops where a senior administrator at the institution makes a conscious decision to support the organic growth that has occurred at an institution with the explicit goal of spreading it throughout. At the University of Windsor, for example, the Vice-Provost Academic created the Office of Open. At Vancouver Community College, an AVP, Academic Innovation position was created with some responsibilities directly associated with open education

initiatives. And at KPU, Open Education initiatives are supported both in a dedicated Office for Open and throughout the institution under the coordination of the AVP-Teaching and Learning, who has sought to embed open as a value in the [Strategic and Academic Plans of the institution](#). A specific intent of this office is to place dedicated funds to positions that are defined and become part of the work of the institution and are therefore succession proof.

In the centralized model, offices tasked with supporting open are fully funded and are empowered to support the growth of OE as well as secure external grants. They are also better able to maintain sustained interest and facilitate growth. They are also better able to record and present the results of their efforts. For example, KPU knows that 31% of students chose to enroll because of the range (977) Zero textbook cost courses.

While open initiatives often begin as grassroots initiatives, institutions that invest in centralizing organizational and financial functions – and especially in taking the effort to embed openness in policy and strategic governance – of supporting this work appear to see better sustained outcomes over time.

## Policies

Policies supporting OE activities are rare. For the most part, OE support develops organically without institutional support and there is no governance body that can propose or implement an institutional policy. And if policies are made that encourage and/or require faculty to use OERs, for example, these policies are largely meaningless due to academic freedom considerations.

There is one noted exception at KPU where an Intellectual Property policy has been initiated that encourages the creation, adaptation, and adoption of. This policy brings awareness to the issue and may have had some effect on the creation of ZTC courses. Also, some institutions, including TRU, at the faculty council level are recognizing OE activities within their Tenure and Promotion standards. This kind of professional recognition enables faculty the benefit of participating where previously there was none. Likewise, some institutions are moving towards open-first policies for teaching and learning centres, where all the work produced and distributed is expected to be openly licensed (except where there might be good reason not to, such as with the sharing of traditional Indigenous knowledges). At the funding level, within the specific area of research, the Tri-Council federal research funding agencies [explicitly supports the open access policy on publications and data sharing, and also explicitly require open knowledge mobilization strategies](#).

The development of Research Councils and the push for open data is further ahead in the UK and could provide a model to follow in Canada as open research expands in practice. Faculty will increasingly require support from their institutions to undertake this work if institutions are to remain credible and competitive in the quest for Tri-Council funding.

BCcampus supported the development of [an Institutional Self-Assessment Tool for OEP Initiatives](#). This tool is available openly for anyone to use and reporting on the initial research conducted during the project is available

## Successes

Successes are most commonly measured in the increase of OER used in courses, which in turn increases the affordability of education to students. We see this as a priority at all institutions, but especially at those that share student demographic profiles akin to TRU. This aspect of success is the easiest to measure, and this is why the development of OERs continues to dominate the conversation of open education. When a faculty member selects a freely available, open text in place of a for-profit publisher's textbook, the dollar amount saved can be calculated by the cost of the textbook multiplied by the number of enrollments in perpetuity. In mid-September 2020, [BCcampus recorded student savings of \\$20 million](#) due its investment into open textbook creation since 2012.

KPU has demonstrated that over a relatively short period of time institutions can move significantly along the path of bringing OERs into the hands of students when institutional supports are strategically engaged. And as importantly having this aligned approach to OE creation/dissemination and with institutional systems can clearly show the benefits of such policies beyond the dollar savings to students eg. the statistic about how ZTC implementation affects enrollment positively.

There was also some success expressed in open pedagogy as a way to engage students with learning and community. While this success is more nebulous to demonstrate, it is based on sound educational practices which have been employed for decades – authentic learning, project-based learning and more. The representatives we spoke to highlight both student and faculty satisfaction from working openly in the community as central to their ongoing commitments to OEP.

Other successes noted were the [AU Press](#), which has openly published academic monographs for years, with a recent example being Martin Weller's [25 Years of Ed Tech](#).

## Challenges

Most persons interviewed at some point expressed disappointment that OE has not grown sufficiently at their institution. In some cases, this was described as an existential crisis going to the heart of post-secondary education, where institutions have not moved from acting as barriers to information sharing rather than disseminators of information and are similarly falling short in their role to make education accessible and inclusive. An emphasis on the university as a business construes OER as a threat to the viability of the bookstore or otherwise increases expenses. In other cases, OE was described as simply one of many issues that senior administrators must reckon with and, without a passion for it, OE simply does not rise up to the level of priority as other issues, e.g., meeting the TRC Calls to Action. Where OEP can be seen as working hand-in-hand to achieve goals in Indigenization and decolonization, as well as equity, affordability, and access, it has greater potential for success. However, time and time again, we see that without strong support in the executive offices of a university, OE is relegated to a piecemeal, course-based approach. It is clear the leaders in this field are those whose institutions

have committed to equity, access, and student success, and who see open as the pathway to getting there.

Typically, the challenges expressed were the need to rely on informal support for OE activities due to a lack of structured institutional support. The level of interest in using OE practices is greater than the support services can provide at almost every institution surveyed. Consequently, instructional support administration, faculty, and staff who work to support open are typically overworked resulting in burnout and ultimately becoming demoralized. And faculty who have developed an OER(s) consistently state that their work is under recognized and undervalued, even when uptake of the resources they have created is significant.

Some interviewees drew attention to the growing influence of publisher-produced content and the failure of institutions to meaningfully grapple with the privacy implications of for-profit educational technologies. Publishers are creating more fully developed products ranging from textbooks to content within proprietary learning management systems, and the requirement is that students access both at a significant cost even compared to traditional textbooks. These systems can be attractive to some faculty as they provide an integrated approach to content delivery; however, for others, it infringes upon academic freedom and raises issues of affordable access, equity, and privacy. It is important to note that the issue of the proliferation of these high-cost resources is a key issue for many student unions and for the national student union bodies. Interviewees raising these concerns noted that the development of OER(s) provides greater faculty control over content delivery while facilitating a more equitable experience.

## Future

Open Education supporters express a range of views. is to some degree facilitated, and this was indeed expressed by most. Again, some in a more provocative manner, described the movement towards open as a backlash against exorbitant vendor fees of software companies or publishers, while others focused on the slow but relentless growth of OEP in creating a more equitable educational system. But within that range of views, there is agreement on the need to be more explicit about presenting the successes and labeling them as success of “open,” and more than grassroots leadership is required. In the words for one interviewee, open initiatives are traditionally “led from the middle.” While this can have a lot of positive momentum and community good will, it also caps the possibility for growth. It follows then that in order for OE initiatives to have long term and scalable benefits, encouragement, support and resources from the highest offices and from within the institution are required.

Where pessimism about open was clearly expressed, it was directed mostly toward the inertia of universities and the business model of delivering students to publishing companies ostensibly as a means of saving money, but really at a cost of student choice and privacy. Publishers pushing forward the product of “inclusive access” is one example of the kind of collaboration between administrators and companies that seems to be based exclusively on financial calculations. Not only are these calculations often inaccurate because there is limited history to accurately understand the model, but the associated agreements also undermine students and faculty in a

variety of ways, including their capacity to access affordable, localized, and up-to-date learning materials. [SPARC details many issues](#) including research based on implementation of the model to encourage more transparent discussion.

Similarly, many interviewees indicated pessimism with regards to institutional commitments to fulfilling their mandate of providing inclusive and affordable education to Canadians. They see a lack of investment in open as indicative of shifting institutional priorities away from access.

#### 4. External Funding

Within the discussions over the course of this project it became apparent that external sources of funding for OEP are very limited. Virtually all funding is secured through grants primarily administered by provincial organizations that are created to support OE at post-secondary institutions such as [BCcampus](#) or [eCampus Ontario](#). Both of these organizations have committed millions of dollars over the years to produce Open Texts. These organizations may also consolidate funding from larger private foundations, such as the Hewlett Foundation as a way to maximize investment.

However, even these organizations are subject to the political environment that allocates money through the Ministry responsible for distributing funds. Survey respondents noted that funding was initially provided to build a portfolio of OER, but found that the funding required to maintain the currency of portfolio is more difficult to acquire.

There is still grant money available and as noted earlier, TRU faculty have received significant funding from BCcampus for specific initiatives. As is typical in this sector, money seems to beget money; institutions that invest in structures to support open education see better success in external funding competitions. Reputationally, these institutions are viewed as leaders and have been approached by external funders to undertake significant open projects. Increasingly, BCcampus and other granting bodies require institutions to match funds; these funds will need to be available for TRU to continue to achieve high levels of success moving forward.

Other avenues for external funding suggested were through the federal government, specifically Social Sciences and Human Resource Council (SSHRC) grants. Some indicated a willingness of this organization to fund OER in relation to open publishing and research. This has been a relatively new stream of funding and would take directed effort to connect with.

Another opportunity suggested was to engage with the Alumni Association in a fund raising effort specifically for the creation of OER. Alumni may have an interest in supporting the enhancement of affordability for current students. This proposition could be addressed directly to TRU Foundation as a program the Limitless Campaign.

#### 5. Conclusion and Discussion of the Future of OE at TRU

TRU has a strong history of working in the OEP space; indeed, many of the interviewees we contacted spoke highly of TRU's historical leadership. From the beginnings of the OL division over 40 years ago through to today, TRU has established an institutional reputation within the

province and internationally that is quite remarkable for a relatively small institution. While OL has been a leading part of TRU in OE, campus-based units, faculty, and students all participate significantly in OE work and in manifesting and enjoying its benefits. In fact, OE is a truly pan-institutional issue, as demonstrated by the range of respondents to this report and the vibrancy of the OEWG and its Communities of Practice.

We note that:

- OE supports the historical mandate of this institution and continues to provide paths to meet the established [Strategic Change Goals](#) particularly in the areas of eliminating achievement gaps and leading in community research and scholarship.
- OE facilitates all of the central TRU values from the Envision TRU process by making course materials more affordable and inviting new voices into the classroom,
- OE facilitates Inclusion and Diversity by allowing for localized content and inviting students to share knowledge in community,
- OE facilitates Community-Mindedness by seeing students as co-creators of knowledge and by offering faculty ways to broadly disseminate their materials,
- OE facilitates Curiosity, and as our commitment to the UN SDG project shows,
- OE facilitates sustainability,
- OE provides a framework and tools to respond quickly to the Indigenization of content, which is a significant part of the change goal to honour truth, reconciliation, and rights.

The approach of OE at TRU is a decentralized model with a variety of different divisions or units, as well as the Students' Union, involved in the creation, support, and advocacy of OE. And while a large part of the effort to date has been on the creation and distribution of OER, other elements of open such as open pedagogy, open research, and open publishing are gaining traction.

This model has created some significant successes as demonstrated by all the accomplishments and positive reputation that TRU has in this area. And in fact, instead of just pockets of faculty developing expertise, OE activities are conducted to some extent in all faculties. The Library, CELT, and the Research Office all help to support and engage faculty in open and to help them undertake their projects. Additionally, faculty who have been active in OER creation generally express that they have received good support from a wide variety of faculty and staff such as instructional designers, coordinators, educational technologies, graphic designers, web developers, production staff, copyright experts, and editors. Faculty are, however, keenly aware of the work required to produce an OER and are concerned about the lack of financial support as well as professional recognition. Students view the implementation of OE generally from the perspective of affordability and ease of access to resources. This means the most important part of OE to them is the creation and distribution of more OER in courses in order to reduce the number of for-profit textbooks and homework systems being used. It is clear from our consultations with the TRU community via survey that the most important component of OEP for both faculty and students – OER development – is also the most resource-intensive. For this work to achieve what every stakeholder wants, more stable investment is needed.

Some OE areas such as open publishing and open research have found support through the job descriptions of Librarians and within the Research Office, but we must remain aware of the imminent growth in these areas. More pressing, though, is that the areas of open pedagogy and OER development are very dependent on the “off the side to desk” efforts of faculty and staff. The OL division currently provides a significant subsidy to much of the OER creation happening on TRU’s campus. It is involved heavily in all aspects of this work through the nature of its history and mandate; however, its staff and faculty have been increasingly used as a resource for the whole of TRU without any increase in personnel to do this work. This does not seem to be a sustainable situation.

The only explicit institutional support for OE has been the OERDG grant program. This program existed for the past three years and has committed \$79,000 to resource development and support for the past two. Given that the institution’s publicly available Consolidated Statement of Cash Flows in 2021 shows an Annual surplus [of \\$17, 405 million](#), and in 2020 an additional \$20,246 million, the 2021 funding represents less than 0.5% of that year’s surplus. As of April 22, funds have been allocated to allow the Program Coordinator to continue supporting the existing grant holders to complete their projects, but no further investment in creating new OER has been allocated.

OEP projects and support have developed in a decentralized structure that, while effective, seems to have run its course as the institution has not to this point committed significantly towards investing to a level commensurate with the skill, interest, and commitment of the faculty, staff, and students working in this area.

OE is one area in which TRU campuses and OL offerings, interests, intentions, and energy align. The desire to make courses affordable, accessible and to have better control over the content are equally prioritized by all. Moreover, in the past months substantive pilot projects that were implemented through the ZeroTextbook Course program have shown tremendous potential and interest for campus and open learning faculty members for broader implementation. For example, over 10 Math faculty member expressed interest in implementing an online homework system within their courses after been shown a demonstration resulting from the pilot. This is very positive and creates the stories of OL and campus personnel working together to create affordable resources and sustainable learning experiences for students are good news stories for the whole community to celebrate.

We believe there is an opportunity for the Provost to call on the university community to discuss how OEP can be integrated fully into the university’s academic planning for the future. Circulating this document as widely as possible can raise awareness to the issues and opportunities in place. While conducting this research there was no direct contact with Deans, we acknowledge their importance in moving the academic direction forward. Circulating this report to the Deans for information would be an important part of further consultation. Support from Faculty Councils is also crucial to further discussion and to a strategic implementation of OEP. And last but certainly not least, the six units and entities that have supported the implementation of OEP should continue to be engaged as they to date are the institutional champions.





## Appendices

### A: BCcampus reports

- Projects with BCcampus
- Student Savings
- Current Adoptions

### B: Reports from Division/Units

- OL
- Library
- CELT
- TRUSU

### C: Surveys

- Faculty
- Student
- Williams Lake

### D: External Interviewees