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*2019–2020 CARLI Open Educational Resources Task Force  
Annual Report of Activities and Projects*

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**Members:**

Annette Alvarado	(2017–2020)	Loyola University Chicago
Sara Benson	(2018–2020)	University of Illinois Urbana-Champaign, Co-Chair (October 2019–June 2020)
Anne Chernaik	(2017–2020)	College of Lake County, Co-Chair (July–October 2019)
Kathy Ladell	(2017–2020)	Northern Illinois University
Elizabeth Nelson	(2017–2020)	McHenry County College
Anne Shelley	(2017–2020)	Illinois State University
Susan Shultz	(2017–2020)	DePaul University
Janet Swatscheno	(2017–2020)	University of Illinois at Chicago, Co-Chair
Linda Zellmer	(2017–2020)	Western Illinois University

CARLI Staff Liaisons: Elizabeth Clarage and Lorna Engels

**Meetings**

The Open Educational Resources Task Force held one in-person meeting at the CARLI Office and met nine times by conference call.

**Activities**

To begin the year, the Co-Chairs polled task for priorities for the year. Using the information from the poll directed the work the task force for the year.

Completed a proposal for the Illinois Library Association Public Policy Committee for per capita funding for open educational resources for Illinois academic libraries.

Proposed to the CARLI Program Planning Committee to fund up to five CARLI members to participate in the Open Textbook Network (OTN) Certificate in OER Librarianship. This OTN program had a competitive application process. The CARLI Program Planning Committee approved this proposal. The OTN selected five librarians from CARLI members for the program. CARLI funding paid the registration fees and a portion of travel for the attendees.

Task Force members attended the program, “Advancing College Access and Affordability in Today’s Global Environment,” hosted by the Association of American Publishers and the chair of the Faculty Advisory Council of the Illinois Board of Higher Education.

Task Force members provided feedback on a statewide survey developed for distribution by the Illinois Board of Higher Education and the Illinois Community College Board.

Reviewed the proposal process and examples of grant proposals for the 2019 U.S. Department of Education call for proposals to support open educational resources. After the review, the Task Force determined that the Task Force and CARLI should not apply for this grant due to the types of organizations and projects that were funded.

Promoted, in the CARLI newsletter and on email lists, the Open Education Week live-streamed presentation, "Beyond Free Textbooks: How OER Addresses Access, Inclusion, and Academic Excellence" by Jasmine Roberts from The Ohio State University held at the University of Illinois at Urbana-Champaign on March 3. The recording is available: <https://youtu.be/ZXynJXVRIJ0> .

Promoted open education and open resources with daily postings during Open Education Week 2020, held March 2-6.

Task Force members, Anne Chernaik, Elizabeth Clarage, and Janet Swatscheno agreed to present at the April 17, 2020 ILCCO/NILRC program, "Exploring OER: Access, Adoption, and Application," at Lincoln Land Community College. This program was cancelled.

Reviewed and updated the handout, "Open Textbooks: The affordable, flexible alternative" that is available on the Open Illinois website.

Reviewed and extensively updated the CARLI Open Educational Resources website, Open Illinois. <https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-overview>

The Task Force drafted and submitted a public comment on the Open Textbook Pilot Program from the U.S. Department of Education.

The Task Force encouraged CARLI members and librarians to submit a public comment on the Open Textbook Pilot Program from the U.S. Department of Education.

At the request of the CARLI Board, the Task Force reconsidered the planned in-person OER Train-the-Trainer programs and the in-person Faculty OER workshops. The Task Force responded to the Board that the programs could be transitioned to virtual events.

Promoted the June 2020 Open Textbook Network Virtual Summit to the CARLI membership. The Summit was held for free for all to attend online.

Task Force proposed to CARLI Board of Directors that the Task Force become a CARLI committee. The proposal is attached to this report. At its March meeting, the Board approved the proposal to become a committee.

## **CARLI OER Committee Proposal**

Prepared by the OER Task Force (OERTF) for the CARLI Board of Directors March 6, 2020 Meeting

### **Original Task Force Charge:**

The Open Educational Resources Task Force will support CARLI's commitment to the "Open Illinois Initiative," namely participation in the Open Textbook Network (OTN), cooperation and collaboration on open educational resources (OERs), and identification and development of materials about OERs for libraries' use with their institutions. This commitment includes the planning and delivery of statewide training about OERs, and the development of web resources related to Open Educational Resources.

The membership of the OER Task Force may include System Leaders (attendees of the Open Textbook Network Summer Institute), staff from CARLI Members that have an Institutional OTN Membership, and staff from CARLI members already using OERs.

### **Task Force Activities and Accomplishments:**

See [Appendix](#) for full list of activities and accomplishments.

- Conducted statewide survey on OER (86 member libraries responded)
- 3 in-person Open Textbook Network Workshops (127 librarians registered)
- 10 librarians conducted faculty OER Workshops with Open Textbook Library Reviews
- CARLI staff provided 10 train-the-trainer sessions
- 61 Open Textbook Library reviews written by Illinois college and university faculty
- Organized and presented at the OER Illinois Summit at Loyola University (52 librarians registered)
- Created CARLI OER Website
- Create CARLI OER Brochure
- Created CARLI OER Email List (96 subscribers)
- 5 CARLI member librarians received funds to attend the Open Textbook Network Certificate in OER Librarianship
- Year 1, 6 System Leaders attended, 1 CARLI staff attended the Open Textbook Network Institute and Summit
- Year 2, 2 System Leaders attended, 1 CARLI staff member attended the Open Textbook Summit
- Year 3, 1 CARLI staff member attended Open Textbook Summit
- Submitted a 2019 Legislative Initiative Proposal for the Illinois Library Association Board

### **Committee Proposal Rationale:**

The CARLI Board originally created the OERTF in support of the Open Textbook Network membership which was crowdfunded by members. The original term of the group was for one year. The term of the task force has been extended twice and will currently conclude on June 30, 2020.

As an organization, CARLI continues to invest resources to support members and Illinois librarians working with open educational resources by providing workshops, training, a program for faculty stipends, funding the Open Textbook Network membership, and the OER Commons Hub. In order to sustain and build on the work accomplished by the CARLI Open Educational Resource Task Force, the Task Force recommends creating a standing CARLI Open Educational Resource Committee to continue to support these programs.

Forming a CARLI Open Education Resource Committee would align with the following Goals from the 2022 CARLI Strategic Plan:

- Establish and Communicate the Value Proposition for Academic and Research Libraries in Illinois
  - Connect CARLI and member library programs and services to student outcomes such as retention and completion
- Encourage Innovation in Skills, Services, and Programs, in all aspects of CARLI Libraries
  - Encourage member libraries to think innovatively about serving students and faculty

While a number of current CARLI committees interact with open educational resources, without a dedicated group the consortium would not have been able to deliver the outreach and programming it has successfully provided over the past two years. Forming a standing committee will allow CARLI to continue to be responsive to the needs of CARLI member libraries.

**Proposed Committee Charge:**

The Open Educational Resources Committee will support CARLI’s commitment to the “Open Illinois Initiative,” namely participation in the Open Textbook Network (OTN), participation in the CARLI OER Commons Hub, and other consortial OER products and activities, cooperation and collaboration on the peer review of, adoption, adaptation, and creation of open educational resources (OERs), and identification and development of materials about OERs for libraries’ use with their institutions. This commitment includes the planning and delivery of statewide training about OERs, and the development of web resources related to Open Educational Resources.

The committee may be assigned projects by the Board of Directors or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The committee will identify educational and training needs within its scope of responsibility and its collaboration with other committees, and will develop workshops, seminars, webinars, or other education opportunities to meet the needs of the membership. The committee will prepare appropriate documentation and reports and will submit an annual report of its activities and accomplishments to the Board of Directors.

The membership of the OER Task Force may include System Leaders (attendees of the Open Textbook Network Summer Institute), staff from CARLI Members that have an Institutional OTN Membership, recipients of the CARLI Open Textbook Network Certificate in OER Librarianship scholarship, and staff from CARLI members using or promoting the use of OERs.

**Appendix: OER Task Force Logic Model**

**Situation:** Decide if the task force will recommend to CARLI to become a committee or terminate the task force.

**Decision:** Recommend the task force becomes a committee.

Inputs	Activities	Outputs	Outcomes	Impacts
<p>CARLI staff time</p> <p>Task force member time</p> <p>Funding for Open Textbook Network membership [crowd funded from the membership]</p> <p>Funding for OTN Institute attendance</p> <p>Funding for three Illinois OTN workshops</p> <p>Funding for up to 5 Certificate in OER Librarianship scholarship (pending)</p>	<p>Created/adapted OER trifold brochure (updated 4 times)</p> <p>CARLI/LOUIS Open Education Week Webinar</p> <p>Building an OER Workshop for your Campus Webinar</p> <p>Updates to CARLI annual meeting, CARLI newsletter, CARLI Board</p> <p>Attending Illinois OER Stakeholders Conference Calls</p> <p>Conducting breakout session at upcoming NILRC/ILCCO conference - Exploring OER: Access, Adoption, and Application</p> <p>Attended OhioLink Affordable Learning, August 2019</p> <p>Attended Illinois Community Colleges OER Summit, November 2018</p> <p>Attended the Open Textbook Network Institute/ Summit</p> <p>Created CARLI Open Illinois (OER) website</p> <p>Conducted Statewide survey</p> <p>Provided workshops</p>	<p>1 CARLI/LOUIS Open Education Week Webinar</p> <p>10 librarian conducted faculty OER workshops with OTN reviews</p> <p>10 Train the trainer sessions done by CARLI Staff</p> <p>69 people registered for Basics and Best Practices for Promoting OER on Campus Webinar, January 2018</p> <p>21 CARLI members viewed Building an OER Workshop for Your Campus Webinar</p> <p>3 updates to CARLI annual meeting, # 16 newsletter updates since it was first announced in May 2017 that CARLI would be joining the Open Textbook Network, and regular updates to the CARLI Board.</p> <p>650 OTL records entered in I-Share</p> <p>9 Illinois OER Stakeholder conference calls attended</p> <p>2 CARLI staff members, 1 OERTF member attended Illinois Community Colleges OER Summit</p>	<p>Faculty/Libraries viewed CARLI/LOUIS Webinar (130-140 attended)</p> <p>Identify CARLI member libraries' OER needs (survey)</p> <p>61 OTL reviews done by faculty</p> <p># of Non-OTL OER reviews</p> <p>Basics and Best Practices for Promoting OER on Campus Webinar participants learned about OER (survey, 16 provided feedback about content of webinar)</p> <p>OTN workshop participants learned about OER</p> <p>All faculty and students at CARLI libraries are able to search OTN library</p> <p>CARLI staff found more resources for the CARLI OER website</p> <p>96 subscribed to optional CARLI-OER email list</p> <p>CARLI member librarians learned about OER at Illinois Summit at Loyola (6 responded in feedback survey)</p>	<p>Illinois students have more equitable access to educational resources</p> <p>CARLI member librarians are more aware of OER and actively engaging with OER</p> <p>Illinois students are saving money on educational material</p> <p>More faculty at colleges and universities in Illinois are using OER</p> <p>More interaction between librarians and faculty at institutions</p>

	<p>Provided webinars</p> <p>Hosted OER Summit</p> <p>CARLI added OTN books to I-Share Catalog</p> <p>Conducted OERTF task force member survey to find out future direction of task force</p> <p>TF wrote ILA Policy proposal that CARLI submitted to ILA for its 2020 legislative agenda</p> <p>Created CARLI-OER Email List</p> <p>Held OER Open Conference Calls</p> <p>Provided direction and feedback on CARLI OER initiatives</p>	<p>Year 1, Open Textbook Network Institute and Summit: <b>6</b> System Leaders attended; <b>1</b> CARLI staff attended</p> <p>Year 2 &amp; 3, <b>1</b> CARLI staff member attended Open Textbook Summit</p> <p>Year 2, <b>2</b> TF member attended Open Textbook Summit</p> <p><b>1</b> CARLI Staff attended OhioLink Affordable Learning</p> <p><b>3</b> in-person OTN workshops, April 2018</p> <p># of attendees to OTN workshops</p> <p>Registration (<b>127</b> total): Governors State: 34 Loyola: 48 Heartland: 46 Streaming: 40</p> <p><b>3</b> webinars given</p> <p><b>1</b> OER Illinois Summit at Loyola</p> <p>Registration: <b>52</b></p> <p><b>5</b> CARLI member librarians received funds to attend the Open Textbook Network Certificate in OER Librarianship</p> <p><b>2</b> OER Open Conference Calls</p>		
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