# OER Planning Framework – updated 3/13/13

This document is intended as a guide for those state teams planning to implement Open Educational Resources (OER). The exercises included within it were completed by seven states as part of the OER Institute in November 2012. Based on the experiences of those states, the exercises have been adapted slightly and are included here as a guide to other states interested in developing systems for Open Educational Resources.

Taking into account best practices of planning and implementation and lessons learned by the states that participated in the OER Institute, we identify five key areas upon which states should focus when creating an OER implementation plan:
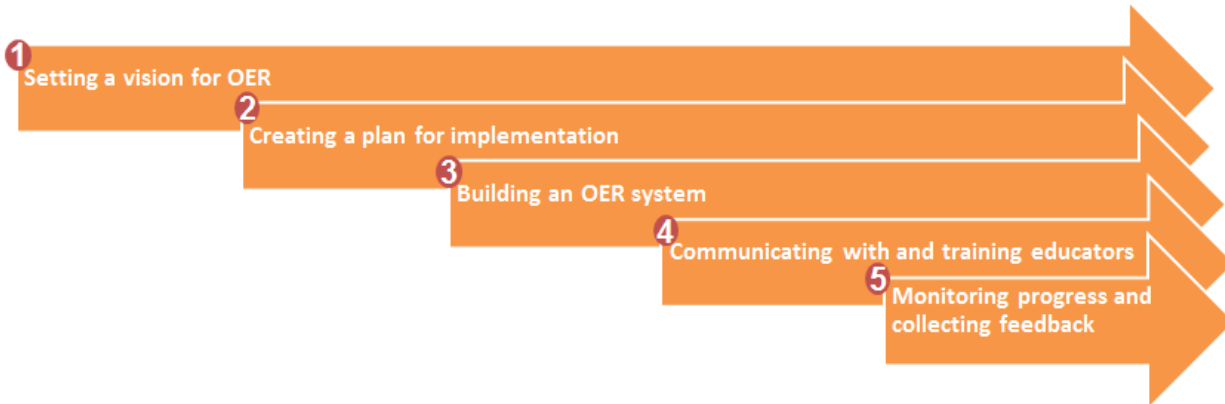


To help states consider each of those five steps, this document is organized in five parts:

   I.    Reflecting on the current progress of OER initiatives
   II.   Setting a vision for OER
   III.  Creating a plan for implementation and building an OER system
   IV.   Communicating with and training educators
   V.    Monitoring progress and collecting feedback

Each part includes questions and templates to consider when planning for or reflecting on OER efforts. The questions and templates included herein are intended as suggestions for state teams to consider. It is important that states also consider existing plans around instructional materials and the implementation of college and career ready standards when addressing these questions, and attempt to integrate OER into existing plans to ensure coherent efforts whenever possible.

We recommend that you complete these exercises in teams, in order to gain feedback and input from the necessary leaders and stakeholders that should be engaged in this work. Potential team members include, but should not be limited to: State leaders from the curriculum and technology divisions, any state leaders currently working on OER, and district leaders from the curriculum and technology divisions.

The exercises contained in this framework are also accompanied by a slide deck, which contains additional background information that may aid teams in completing these exercises. You may also reference "Implementing Common Core State Standards and Assessments: A Workbook for State and District Leaders," for additional content and examples regarding planning and implementation.

# I. Reflecting on the current progress of OER initiatives

Before you can begin working on OER implementation, you must understand what work has currently been done in your state. Use the following template and the self-assessment questions on slide 7 to reflect on current progress.

## Objectives:

- Reflect on our current OER work and agree on our current progress
- Identify areas of strength and challenge

## Directions and Guiding Questions:

- Review the first row of the self-assessment framework (on slide 7) and discuss where you feel your state falls on a scale of 1-4 (where 1 is strongly disagree and 4 is strongly agree). Record your vote and notes on the template
- Discuss your votes and rationale as a team and try to come to consensus about the state's current progress. Record the team vote and notes on the template
- Repeat the process with the remaining four rows of the self-assessment
- Reflect on your final votes, discuss:
    - Do they indicate any particular areas of strength for your team?
    - Any challenges?
    - Based on these results, where should your team focus your work moving forward?

## Related Materials and Slides:

- Template (p. 5)
- Self-assessment questions (slide 7)
- Slides 6 - 8

# Template I: Reflecting on the current progress of OER initiatives

|  | Your vote | Team vote | Rationale |
|---|---|---|---|
| Setting a vision for OER |  |  |  |
| Creating a plan for implementation |  |  |  |
| Building an OER system |  |  |  |
| Communicating with and training educators |  |  |  |
| Monitoring progress and collecting feedback |  |  |  |

## II. Setting a vision for OER

Your vision will help set the stage for where you want to go in your state. You should consider what the ideal OER system would look like, the expected impact on educators and students, and what success would look like. Use the following template to help articulate your vision.

### Objectives:

- Discuss and agree upon a vision for our state's OER work
- Identify the expected impacts of the OER work on teachers and students in our state

### Directions and Guiding Questions:

- Keeping in mind the state's current work on instructional materials, reflect on your ideal vision for OER in your state. Record your answer on a sticky note.
- Post all sticky notes to a shared poster and provide team members the time to read and reflect on others.
- Discuss the various responses, what you like about your team members' responses, and what you would change. Try to unit them into one common vision for your state and record that on the template.
- Discuss the following with your team, taking notes on your template:
    - What impact do you expect OER to have on teachers? On students?
    - How will you measure success for each group?
    - Who do you need to share this vision with?
    - How will you get them to buy in to the vision?

### Related Materials and Slides:

- Template (p. 5)
- Slides 9 - 18

## Template II: Setting a vision for OER

| **What is your vision for the OER system in your state?** |
| --- |
| *What does OER ideally look like in your state's context? Think forward several years from now, what will it look like if you have been successful in this work?* |
|  |

| **What will be the impact on teachers?** | **What will be the impact on students?** |
| --- | --- |
|  |  |

| **How will you measure success with teachers?** | **How will you measure success with students?** |
| --- | --- |
|  |  |

| **Who do you need to share this vision with?** | **How will you get them to buy in to the vision?** |
| --- | --- |
|  |  |

# III. Creating a plan for implementation and building an OER system:

Your plan will help you identify the activities necessary for successful implementation of the OER system. It is also important to identify a responsible owner for each activity, risks and challenges, necessary resources, and timeline for your activities. Once these have been identified, you can begin building the system through which educators will access OER.

This section is divided into three parts, each of which help with planning for and building the OER system.  Use the following questions and template to create your plan for implementation.

   a) Identifying activities, barriers, and potential solutions: p. 6 – 7
   b) Describing each activity: p. 8 – 9
   c) Plan ownership and timeline: p. 9 – 10

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## Part IIIa: Identifying activities, barriers, and potential solutions

### Objectives:
- Identify the necessary activities that must take place to successfully implement an OER system
- Identify potential barriers to success
- Discuss potential methods and allies for addressing barriers

### Directions and Guiding Questions:
- As a group, brainstorm the key activities that must occur for you to achieve your vision. Use the questions in the template on p. 7 as a guide
- Then for each activity, consider the potential barriers that exist. Are there policy barriers? Other barriers or challenges? Record these on the template.
- Finally, consider potential ways to address or mitigate those challenges. What are the key actions you would take? What allies or stakeholders should you call upon? Record these on the template.

### Related Materials and Slides:
- Template (p.7)
- Key questions to consider (on template or slide 23)
- Slides 19 - 24

## Template IIIa: Identifying activities, barriers, and potential solutions

| Activities: *What key activities must occur for you to achieve your vision?* | | Barriers: *What barriers, policy or otherwise, are associated with each activity?* | Key actions and key allies: *What do you need to do to address barriers? Who can you call on?* |
|---|---|---|---|
| *Specifically consider:*<br><br>*Access:*<br>• *What portal or venue will you use to share resources? Is there an existing venue you can use?*<br>• *How will you handle licensing/copyright? How "open" will materials be?*<br>• *How will you address technology infrastructure challenges?*<br>*Resources:*<br>• *How will you gather/create materials?*<br>• *How will you work with vendors in the environment of openness and common standards?*<br>*Quality:*<br>• *How will you define quality? What rubrics will you use?*<br>• *How will you evaluate quality? Who will evaluate quality?*<br>*Policy:*<br>• *How will you work within or address curriculum and textbook adoption policies and funding restrictions?*<br>*Potential Collaboration:*<br>• *Do you plan to collaborate and share resources with other states? How?* | | | |

## *Part IIIb: Describing each activity*

Note that this exercise and the questions contained within should be considered for each of the priority activities that you identified in Part IIIa. You may wish to make multiple copies of the associated template (p. 9)

### Objectives:
- Create detailed plans for priority activities

### Directions and Guiding Questions:
- As a group or as responsible individuals, complete the template on p. 9 for each of the priority activities you identified in Exercise IIIa. For each activity consider:
  - Who is responsible for this activity?
  - How will this activity reach the field at scale (e.g. how does the delivery chain work?)?
  - How will you know this activity is working? What are the feedback loops?
  - What are the potential risks and challenges? How will you manage those?
  - What resources are required for this activity?
  - How does this activity support or connect to your larger plan for implementation of college and career-ready standards?

### Related materials and slides:
- Template (p. 9)
- Outputs from exercise IIIa
- Slides 25 - 34

## Template IIIb: Describing each activity

**Activity Description:**
*How does this activity work? How will it help you achieve your goals?*

**Responsible Owner:**
*Who will be responsible for ensuring this activity is successfully implemented?*

**Delivery Chain:**
*Who are the key actors through which the activity must move in order to reach the field? What are the relationships between each?*

**Feedback Loops:**
*How will you know this activity is working? What will you measure to ensure it is reaching the field?*

| Challenges: | Mitigation Strategies: |
|---|---|
| *What are the potential risks and challenges associated with this activity? Use the delivery chain as a guide.* | *How will you manage the identified risks and challenges?* |

**Resources and support required:**
- *What resources (monetary, human, technological, etc.) are required for this plan to be successful?*
- *What support does the team need from others?*

**Connection:** *How does this activity support or connect to your larger implementation plans for college and career ready standards?*

## *Part IIIc: Plan Ownership and Timeline*

## Objectives:
- Identify a responsible owner for the OER work overall
- Identify a timeline for implementing priority activities

## Directions and Guiding Questions:
- As a group for your overall plan consider and record notes on the template:
  - Who is responsible for the overall OER strategy?
  - What is the timeline for implementing priority activities?
    - Is there a final deadline you are working toward?
    - Are there other time-sensitive activities to consider?
    - Therefore, when will each activity need to be completed?
    - Are there deadlines or milestones along the way?
    - What timelines already exist for rollout of instructional materials or professional development that you should build off?

## Related Materials and Slides:
- Template (p.11)
- Outputs from exercises IIIa and IIIb
- Slides 35 - 36

## Template IIIc: Articulating Plan Ownership and Timeline

| | |
|---|---|
| **Responsible owner for OER plan:** *Who will be responsible for ensuring the activities are completed and the goals are achieved?* | |
| **Timeline:** <ul><li>*Is there a final deadline you are working toward?*</li><li>*Given that deadline, when will each of your key activities need to be completed?*</li><li>*Are there other time sensitive activities to consider (e.g. policy changes)*</li><li>*Can you break those deadlines down into key milestones along the way?*</li><li>*What timelines already exist for rollout of instructional materials or professional development that you should build off of?*</li></ul> | |

## IV. Communicating with and training educators:

A necessary part of your plan will be communicating with and training educators. Use the following guiding questions and templates to identify your key stakeholders, describe ideal engagement (including training) with each, and craft your messages and training for each.

This section is divided into two parts which help you plan for two related communications efforts.

- a) Training educators: p. 12 – 13
- b) Communicating OER: p. 14 – 15

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## *Part IVa: Training educators*

### Objectives:
- Identify or clarify the role of each of the key stakeholder groups in OER implementation and use
- Plan for communications and training opportunities for your key stakeholders

### Directions and Guiding Questions:
- Discuss with your team and take notes on how teachers should be engaged in the OER work:
  - What role do you want them to play?
  - What do they need to know, understand, or be able to do in order to play that role?
  - What kind of training do they need in order to play that role? Consider whether you can take advantage of existing training or development opportunities
- Repeat the process for school and district leaders
- Consider any other groups that will play key roles and need to be trained, discuss and record notes for them

### Related Materials and Slides:
- Template (p.13)
- Slides 39 - 45

## Template IVa: Training educators

| Educator Group | Ideal role | What do they need to know, understand, or be able to do? | How will you reach them?/ What kind of training do they need? |
|---|---|---|---|
| Teachers | | | |
| School leaders | | | |
| District leaders | | | |
| Other groups? | | | |

## *Part IVb: Communicating OER*

### Objectives:
- Identify key stakeholders to be engaged in the OER work
- Plan to engage key stakeholders in the OER work

### Directions and Guiding Questions:
- As a group, brainstorm the key stakeholders/stakeholder groups that need to be engaged or knowledgeable about OER
- For each stakeholder, consider and record:
    - What is the stakeholder's current level of engagement? High or low?
    - Ideally, what would the engagement of this stakeholder look like?
    - How will you engage this stakeholder?
    - What is your message to this stakeholder?
    - How will you know your message is reaching this stakeholder?

### Related Materials and Slides:
- Template (p. 15)
- Slides 39 - 45

## Template IVb: Communicating OER

| Stakeholders | Current level of engagement | Ideal role | How to engage | Message | How will you know your message is reaching stakeholder? |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
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# V. Monitoring progress and collecting feedback

Finally, you will need to establish methods for monitoring implementation progress, assessing success, and collecting feedback from the field. Use the template below to identify your methods for assessing success and monitoring progress.

## Objectives:

- Identify success metrics and feedback loops for the OER work
- Establish methods for regularly monitoring our progress

## Directions and Guiding Questions:

- Discuss how you will measure the success of your OER work overall, and record notes on the template (note that this should be derived from the vision you established in Exercise II)
- Identify any feedback loops you will use to know whether your activities are having their intended impact (note that these should be pulled from the individual activity descriptions you established in Exercise IIIb)
- Discuss your ideal routines including:
    - How often will we check in on success?
    - How will we check in (in person, by email, written note, phone calls, other)?
    - Who should be involved in these check-ins?
    - Who is responsible?
    - What data will be reviewed?

## Related Materials and Slides:

- Template (p. 17)
- Slides 46 - 51

## Template V: Monitoring progress and collecting feedback

| Measuring progress and success | |
|---|---|
| **Success metrics:** *How will you measure success? How will you determine whether OER are having their intended impact on educators and students?* | |
| **Feedback loops:** *How will you determine whether your activities are reaching the field and being implemented as intended? What metrics will you use to assess implementation progress?* | |
| **Establishing methods for monitoring progress** | |
| *How often will you check in on successful completion of milestones and progress on success metrics?* | |
| *What will be the venue for these check-ins?* | |
| *Who should be involved?* | |
| *Who is responsible?* | |
| *What data will be reviewed?* | |