



**Kansas State University**

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**From the Selected Works of Rebel Cummings-Sauls**

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# OER Review Standards and Approval Rubric: United States Edition

Rebel Cummings-Sauls



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Available at: [https://works.bepress.com/rebel\\_cummings-sauls/35/](https://works.bepress.com/rebel_cummings-sauls/35/)

# Main Draft- OER Review Standards and Approval Rubric: United States Edition

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## Purpose and Background

- Standardised by open education resources (OER) advocates and individuals engaged in supporting the curation and creation of OER.
- In use by students, faculty, and administration; across levels (Pk-20)
- Uphold [principles of academic freedom](#) for all
- Document and develop best practices to shape national OER review standards
- Rubric will facilitate fluidity of choice in learning material selections
- Learner-centered, universal design approach
- Recognize and ingrain a quality review process as part of the OER culture and community
- Multiple definitions of OER globally; This tool would be relevant to review and approve content with measurable learning outcome(s) that provide at least one channel to free-of-cost access which permits personal/educational retain and reuse.
- Provide opportunities for continuous reflection; Establishing evolving standards and initiatives instead of subjective perspectives that could be based on biased practices and influences.
- Quality, like beauty, is in the eye of the beholder, therefore we will not attempt to define quality and will leave this to your perspective and identified needs.
  - Scholars and subject matter experts are best equipped to evaluate quality of content. Pedagogical quality is best evaluated by experienced instructors. For categories in which widely available standards are available, such as those provided by [Web Content Accessibility Guidelines](#) (WCAG) for accessibility, a 'checklist' is useful.
  - Many of the benefits of OER have to do with the fact that they break free of externally created value statements. This rubric can serve as a resource through which users can surface and identify aspects of the teaching and learning resource most important to their community.

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# Introduction

As open education resources (OER) advocates and individuals engaged in supporting the curation and creation of OER, the document collaborators came together on the common interest in curating and creating best practices or standards for OER review and approval. The document began formation as a grassroots effort in late 2019. Previously, Florida legislation mandated that the Florida Academic Library Services (FALSC, Florida Public Academic Library Network as of July 2021) “work with public postsecondary education institutions in developing a standardized process for the review and approval of open-access textbooks and education resources.” Through the Summer of 2020, the Director of Digital Services and OER at FALSC, Rebel Cummings-Sauls, worked with Florida Librarians and the OPEN FL Community to review and curate areas and resources to consider in the development of a unified template to review and approve OER. At the Library Publishing Forum 2020 Ms. Cummings-Sauls brought this topic for engagement and exploration by experts in Library Publishing, many of whom are actively creating and developing OER on a yearly basis.

LPForum 2020: <https://librarypublishing.org/lp-forum-2020/>

WORKSHOP/EXPERIMENTAL SESSION | *OER and Open Access Textbooks Review Standards and Approval Rubric* [[review/rubric doc](#)]

Rebel Cummings-Sauls

This session was valuable in identifying missing rubrics and standards from the beginning curated list; identified aspects of the best practices, standards, and rubrics that are used at individual institutions; and gathered critical input and feedback from OER content publishers. Following the success of this session, in Fall of 2020, Ms. Cummings-Sauls put out a call for volunteers across the state and nation for individuals interested in brainstorming and collaborating on curating and creating best practices and standards for OER review and approval. These individuals, listed as contributors above, have helped to shape this document to provide guidance to the national community to incorporate OER into their learning environments with unified review and approval standards. Meetings were held on an approximate quarterly basis and additional feedback was gathered through email distribution or directly into a shared brainstorming documentation. Through much discussion and intense review the following national standards and best practices arose for inclusion.

- Copyright and Rights/Open Licensing
- Publishing
- Accessibility
- Cultural Considerations
- Costs and Impact
- Resource/Subject Alignment
- Ethical Use of Data

While this group is dependent on volunteers the expected next review will be by July 2023. Throughout this time any comments, errors, or other communication on standards and rubric can be directed to [rsauls@fivc.org](mailto:rsauls@fivc.org). This is a final draft released on August 9, 2021 in a call for national feedback and input on implementation or potential use of this documentation.

# Copyright and Rights / Open Licensing

Working Document:

<https://docs.google.com/document/d/1nTrHPNTREWhnuiZ6DJeFJ5fAmm98jnIBCuaNIU0YEBU/edit?usp=sharing>

Sub-Section Contributors:

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- Rebel Cummings-Sauls (rsauls@flvc.org)

1. What should be included in the Rubric?

- All sources or contributed resources are properly identified and cited.
- What is the Rights Classification and Information for the content:
  - Retain Allowed?
  - ReUse Allowed?
  - ReMix or Modification Allowed?
  - Open or Creative Commons License?
  - Public Domain?
- Exact Rights/License: \_\_\_\_\_
- Does the resource's license permit the educational use?
- Does the copyright restrict or impact the educational use?
- Do legal exemptions permit educational use?
  - If Yes, please specify: \_\_\_\_\_

2. What are best practices to review?

Texas:

<https://opentexas.secure-platform.com/a/gallery/rounds/1/details/393>, includes case study descriptions and need to attend to copyright issues up front.

Florida Academic Libraries Services Cooperative Copyright Guide:

<https://falisc.libguides.com/c.php?q=930399&p=6704621>

University of Texas Press Permission Guidelines for Authors

<https://utpress.utexas.edu/authors>

Rutgers University Library sample permission request

<https://www.libraries.rutgers.edu/copyright/copyright-basics/obtaining-permissions/template>

Ohio State University Libraries Copyright Services

<https://library.osu.edu/copyright>

San Diego State University Library Best Practices Codes  
<https://libguides.sdsu.edu/copyright/bestpractices>

Measuring Fair Use: The Four Factors - Stanford Libraries  
<https://fairuse.stanford.edu/overview/fair-use/four-factors/>

3. Where are the standards that support these best practices?  
Consult the U.S. copyright office <https://copyright.gov/legislation/> and your attorney.

U.S. Copyright Office Fair Use Index  
<https://www.copyright.gov/fair-use/>

CC Licenses  
<https://creativecommons.org/about/cclicenses/>

Summaries of Fair Use Cases - Stanford University  
<https://fairuse.stanford.edu/overview/fair-use/cases/>

# Publishing

Working Document:

[https://docs.google.com/document/d/16naJfGEPHF6DfIjR\\_kAhIjVVOkkVA3HsIdAXx4zJaxs/edit?usp=sharing](https://docs.google.com/document/d/16naJfGEPHF6DfIjR_kAhIjVVOkkVA3HsIdAXx4zJaxs/edit?usp=sharing)

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- Cindy Gruwell [cgruwell@uwf.edu](mailto:cgruwell@uwf.edu)

1. What should be included in the Rubric?

- Usability- Acceptable for education purposes?
- Publisher Identified?
- Readability level- Written for students in the current education environment?
- Related content/ancillaries/course-pack/content set available?
- Established process and documentation for corrections and revisions?
- Digital Distribution Formatting- What is the File Format(s) available?
  - File and format easily accessible?
  - Platform interoperability with indexers and harvesters/aggregators
  - Sustainable format and location?
  - Software Included?
    - Open Source?
- Discoverability- Standards-based Catalog and Metadata:
  - Content/metadata interoperable with indexers and harvesters/aggregators
  - Metadata and/or HTML meta tags included
    - Title
    - Abstract/description
    - Keywords, subject headings, topic areas
    - Copyright statement or license
- Date of Publication
  - Release or Publication Date available
  - Location of Publication
  - Expected longevity/through shelf date/Expected revision date
  - Latest Edition or Version?
- Author/Creator(s)
  - Identified and Confirmed:
    - ORCID
    - Institutional faculty webpages
    - Corporate name or jurisdiction name
  - Experience:



- Previously published in topic/discipline;
- Degree;
- Length teaching or researching in topic/discipline
- Background or Regional knowledge
- Entity Association: \_\_\_\_\_
- Authentic and original work of author/creator?
- Additional Entities / Creators / Contributors identified and credited?
  - Subject Matter Experts (Contributors, Reviewers, or Editors)?
  - Student or community contributions
- Any conflicts of interest?
- Fiscal Agents or Entities who supported development, publication, or hosting of this content: \_\_\_\_\_
- Any additional affiliation or grant funding that should be noted or documented: \_\_\_\_\_

2. What are best practices to review?

An Ethical Framework for Library Publishing:

<https://librarypublishing.org/resources/ethical-framework/>

Authors Alliance:

[FAQ: Copyright Ownership & Online Course Materials](#)

Pressbooks:

[Book Info – Pressbooks User Guide](#)

BCCampus:

[BCCampus Open Education Self-Publishing Guide](#)

Open Education Network:

[Publishing Cooperative – Open Education Network](#)

3. Where are the standards that support these best practices?

**Authors Alliance.** (n.d.) Retrieved from <https://www.authorsalliance.org/>

Coalition on Publication Ethics. (2017). **Authorship and contributorship.** Retrieved from <https://publicationethics.org/authorship>

[The Open Archives Initiative Protocol for Metadata Harvesting \(OAI-PMH\)](#)

**ORCID.** (n.d.). Bethesda, MD: ORCID, Inc. Retrieved from <https://orcid.org>

110 - Main Entry-Corporate Name (NR): MARC 21 Bibliographic - Full.

<https://www.loc.gov/marc/bibliographic/bd110.html>

# Accessibility

Working Document:

<https://docs.google.com/document/d/1dM-A4sD6lljJeDbtD1JZ9K2MFGx-9YPCfWZoALjkj1c/edit?usp=sharing>

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- Daphne Tseng ([tsendaph@isu.edu](mailto:tsendaph@isu.edu)) - Idaho State University

1. What should be included in the Rubric?

- Access available for students/users of all abilities?
- Universal Design for Learning/pedagogical accessibility evident in content?
- Access:
  - Free of Barriers to Access? (i.e. No Account/Signup required)
  - Usable offline?
    - Printable?
  - Mobile compatibility?
  - Non-discriminatory?
  - Content/File format proprietary, open format, or mixed?
    - Can the format be easily converted to work with varying assistive technologies or preferred formats?
- Images:
  - Alternative text available with all images is clear and descriptive
  - Chunks of text aren't embedded into images
  - Appropriate narratives are provided for complex images (i.e. chart, graph or maps)
- Audio:
  - An accurate transcript is included
  - For audio without narration, an audio description is included
- Video:
  - Accurate and timed closed captioning is included
  - For slide-based video presentations, a printable version with transcript is available
  - Transcripts are provided if the videos are intentionally added without caption (i.e. for language learning purposes.)
- Text:
  - Headings Included
    - Are defined throughout the text
    - Are nested appropriately without skipping heading levels

- Tables
  - Include a defined, repeating header row
  - Include a simple structure without merged cells
  - Are used only for appropriate tabular data
- Lists are defined appropriately as ordered or unordered lists
  - Unordered lists are used for lists that do not need to be displayed in any particular order
  - Ordered lists are only used for lists that do need to be displayed in a particular order, such as step by step instructions
- Clickable links are attached to text that describes where the link leads
- Text emphasis is indicated by bold or italics
- Color is not used to convey meaning
- Links and Hypertext
  - Avoid uninformative link phrases
  - Consider the readability and length for URLs as links.
  - The link text must have a 3:1 contrast ratio from the surrounding non-link text.
- Self-Assessments:- opportunities are provided to assess learning without a graded penalty before completing graded assignments/exams (i.e Ungraded, multiple-attempt quizzes might be made available before exams for self-assessment and study purposes or Assignment grading criteria might be made available with opportunities for peer review before final submission).
- Activities- options are provided for completing activities in multiple formats \*where appropriate (i.e. discussion boards might allow students to respond in varying formats such as text, audio, or video; creative assignments might allow students to complete the activity in varying formats such as websites, essays, or other artistic expression).

## 2. What are best practices to review?

Open for Everyone: Integrating Universal Design for Learning in Open Education Practice.

Created June 17, 2019 by user Tacoma Community College Library.

<https://www.oercommons.org/authoring/55063-open-for-everyone-integrating-universal-design-f/view>

UDL ON CAMPUS · Universal Design for Learning in Higher Education.

[http://udloncampus.cast.org/page/media\\_oer](http://udloncampus.cast.org/page/media_oer)

Universal Design for Learning (UDL): Articles. <https://mtsac.libguides.com/udl/articles>

The Foundation of Online Learning for Students with Disabilities.

[http://www.centeronlinelearning.res.ku.edu/wp-content/uploads/2017/04/Foundation\\_7\\_2012.pdf](http://www.centeronlinelearning.res.ku.edu/wp-content/uploads/2017/04/Foundation_7_2012.pdf)

[OER Accessibility Evaluation Rubric](#) (Affordable Learning Georgia)

[Accessibility Resources](#) (Affordable Learning Georgia)

OER Accessibility Toolkit. <https://open.ubc.ca/access/toolkits-access/oer-accessibility-toolkit/>

3. Where are the standards that support these best practices?  
U.S. ADA Acts, Laws, and federal requirements, see Appendix A

Universal Design

IDEA- <http://idea.ap.buffalo.edu/>

[About UDL for Learning](#), Retrieved from

<https://www.cast.org/impact/universal-design-for-learning-udl>

[Quality Matters](#), Retrieved from <https://www.qualitymatters.org/>

[Alternative Text Basics](#) (WebAIM)

[Color Contrast Checker](#) (WebAIM)

# Cultural Considerations

Working Document:

<https://docs.google.com/document/d/1g7tRjVMg7lJtA6KWMrkK8Wd5KjT0cOSyFsv8S3xxJC4/edit?usp=sharing>

Sub-Section Contributors:

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1. What should be included in the Rubric?

- Language Support / Translations Available
- Cultural Correlations (local, state, national, international)
- Available in language used in the current education environment?

2. What are best practices to review?

Achieving the Dream, Using Open Educational Resources to Create a Culturally Relevant Classroom, Dr. Ruanda Garth-McCullough and Dr. Richard Sebastian, Retrieved July 2021.

<https://www.achievingthedream.org/news/18315/using-open-educational-resources-to-create-a-culturally-relevant-classroom>

3. Where are the standards that support these best practices?

No official language of the United States at the federal level. However, several states do have a standard language in state legislation. In addition the course and learning development may require the use of a specific language.

# Costs and Impact

Working Document:

<https://docs.google.com/document/d/1vYrW8qUnljQcZ51TeQByLoPgF8y1Eg9a9IixeSpG2Ew/e/dit?usp=sharing>

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- Jeff Gallant <[jeff.gallant@usg.edu](mailto:jeff.gallant@usg.edu)>

1. What should be included in the Rubric?

- Cost for the adoption, adaptation, or creation of materials
  - Cost for the institution/department for platforms needed to implement OER
    - Pedagogy tools and platforms (communication, interactivity, adaptive learning, etc.)
    - Hosting tools and platforms (repository, creation platform, website, etc.)
  - Faculty Time/Resources
    - Additional redesign time needed to implement OER
    - Learning Management System course redesign
    - Syllabus/Outcomes redesign
    - Additional creation time needed for a successful OER implementation, i.e. Creation of new ancillary materials
    - Revision of the evaluated OER
  - Additional support time needed to implement OER
    - Hosting (librarians, IT)
    - Design (instructional designers)
  - Sustainability: Cyclical period of time for course and/or materials revisions/redesigns. Versioning documented and linked.
  - Total Institution Implementation Costs: \_\_\_\_\_
- Costs and Cost Avoidance to Students
  - Cost Avoidance Per Student:
    - Existing or Comparable Commercial Textbook Cost \_\_\_\_\_
    - Cost per Student (for any required support/platforms/content): \_\_\_\_\_
    - Total Cost Avoidance Per Student (Existing Cost (1) - Cost Per Student (2)) \_\_\_\_\_
  - Total Cost Savings For the Course:

- Average student enrollments affected by implementation per semester/quarter:\_\_\_\_\_
- Average Cost Avoidance Per Semester/Quarter (enrollments x total cost avoidance per student, one average per season/time period):  
\_\_\_\_\_
- Cost savings in one year (academic, calendar, or fiscal, as the sum of all semesters/quarters in the year):\_\_\_\_\_
- Free of Barriers to Access
  - Additional Logins
  - Costs
  - Internet Required

2. What are best practices to review?

- [OpenOregon](#)
  - [Is the average cost of a Textbook \\$100?](#)
- [North Dakota University System \(state audit report\)](#)
- [Affordable Learning Georgia Data Center](#)
- [SPARC / Lumen \(joint study\)](#)
- MHEC Webinar, [Calculating Cost Savings Associated with OER Implementation](#)

3. Where are the standards that support these best practices?

See Appendix A.

Florida Virtual Campus Textbook Survey Data [2010](#), [2012](#), [2016](#), and [2018](#).



# Resource/Subject Alignment

Working Document:

<https://docs.google.com/document/d/13-V0BWfSVodfOoB4O0EWNbQRTJSnkcZywCtpnJ2iBBo/edit?usp=sharing>

Sub-Section Contributors:

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1. What should be included in the Rubric?

- Course Association: \_\_\_\_\_
  - Intended Purpose matches course education needs?
  - Learning outcomes comparable to similar course resources?
  - Appropriate content for Target Audience?
  - Prerequisite Course Resource: \_\_\_\_\_
  - Continuing Course Resource: \_\_\_\_\_
- Accurate and Reliable:
  - Content clear, concise, and coherent?
  - Content relevant and appropriate to purpose/learning outcome
- Content achieves or exceeds pre-set criterion-referenced standard:
  - Author provides learning objectives and outcomes relevant to discipline and course level.
  - User/Student will be able to respond or interpret content appropriately
  - Stimulates motivation or engagement in learning
  - Content is either (i) Essential or (ii) Not-essential but useful [Lawse (1975)]
  - Audience could understand the topic well and easily
  - Content adequate and not overloading of information
  - Ability to navigate through content as an individual?
  - Visual elements used were not distracting from learning?
  - Follows current or best practices in pedagogical methods?
  - Biases or potential conflicts of interest identified?
- Faculty verified use in course?
- Available faculty and student reviews and link to review?

2. What are best practices to review?

Open Textbook Library Review:

<https://open.umn.edu/opentextbooks/reviews/rubric>

Sample Course Map for Alignment of Learning Outcomes with Resources (Developed for [Texas Learn OER](#)):

<https://docs.google.com/spreadsheets/d/1W3zqcaUP0yTUXN6xMr4AZEIObTXaZ0NVLGX1M0qMWDM/edit#gid=0>

3. Where are the standards that support these best practices?  
See Appendix A.

[Quality Matters](https://www.qualitymatters.org/), Retrieved from <https://www.qualitymatters.org/>

# Ethical Use of Data

Working Document:

[https://docs.google.com/document/d/14pAZ4gxGTr31BFD08y-gijPNm4gpm\\_BZGFenp8Mb10k/edit?usp=sharing](https://docs.google.com/document/d/14pAZ4gxGTr31BFD08y-gijPNm4gpm_BZGFenp8Mb10k/edit?usp=sharing)

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1. What should be included in the Rubric?

Data Collection:

Is data being collected?

What type of data is collected: \_\_\_\_\_

Will it be used for research?

Who has ownership of the data: \_\_\_\_\_

Is the data collection transparent?

Data Privacy:

Do students have input on data collected?

Are the students able to adjust tracking?

How is the data made available?

2. What are best practices to review?

Open Data as Open Educational Resources Case studies of emerging practice:

<https://education.okfn.org/files/2015/11/Book-Open-Data-as-Open-Educational-Resources1.pdf>

OSCQR – SUNY ONLINE COURSE QUALITY REVIEW RUBRIC:

<https://oscqr.suny.edu/standard14/>

CUNY- Student Privacy

<https://library.citytech.cuny.edu/blog/oer-and-student-privacy/>

3. Where are the standards that support these best practices?

The Citizen's Guide to Open Data:

<https://citizens-guide-open-data.github.io/guide/4-od-and-privacy>



# Rubric

## Copyright

- All sources or contributed resources are properly identified and cited.
- What is the Rights Classification and Information for the content:
  - Retain Allowed?
  - ReUse Allowed?
  - ReMix or Modification Allowed?
  - Open or Creative Commons License?
  - Public Domain?
- Exact Rights/License: \_\_\_\_\_
- Does the resource's license permit the educational use?
- Does the copyright restrict or impact the educational use?
- Do legal exemptions permit educational use?
  - If Yes, please specify: \_\_\_\_\_

## Publishing

- Usability- Acceptable and applicable for education purposes?
- Publisher Identified?
- Readability level- Written for students in the current education environment?
- Related content/ancillaries/course pack/content set available?
- Digital Distribution Formatting- What is the File Format(s) available?
  - File and format easily accessible?
  - Sustainable format and location?
  - Software Included?
    - Open Source?
- Discoverability- Catalog and metadata:
  - Content/platform interoperability with indexers and harvesters/aggregators
  - Metadata and/or HTML meta tags included
    - Title
    - Abstract/description
    - Keywords, subject headings, topic areas
    - Copyright statement or license
- Date of Publication
  - Release or Publication Date available
  - Location of Publication
  - Expected longevity/through shelf date/Expected revision date

- Latest Edition or Version?
- Author/Creator
  - Identified
  - Experience:
    - Degree;
    - Previously published in topic/discipline;
    - Length teaching or researching in topic/discipline
    - Background or Regional knowledge
  - Entity Association: \_\_\_\_\_
  - Authentic work of author/creator?
  - Additional Entities / Creators / Contributors identified and credited?
    - Subject Matter Experts (Contributors, Reviewers, or Editors)?
    - Student or community contributions
- Any conflicts of interest?
- Fiscal Agents or Entities who supported development, publication, or hosting of this content: \_\_\_\_\_
- Established process for corrections and revisions?
- Any additional affiliation that should be noted or documented: \_\_\_\_\_

## Accessibility

- Access available for students/users of all abilities?
- Universal Design for Learning/pedagogical accessibility evident in content?
- Access:
  - Free of Barriers to Access? (i.e. No Account/Signup required)
  - Usable offline?
    - Printable?
  - Mobile compatibility?
  - Non-discriminatory?
  - Content/File format proprietary, open format, or mixed?
    - Can the format be easily converted to work with varying assistive technologies or preferred formats?
- Images:
  - Alternative text available with all images is clear and descriptive
  - Chunks of text aren't embedded into images
  - Appropriate narratives are provided for complex images (i.e. chart, graph or maps)
- Audio:
  - An accurate transcript is included
  - For audio without narration, an audio description is included

- Video:
  - Accurate and timed closed captioning is included
  - For slide-based video presentations, a printable version with transcript is available
  - Transcripts are provided if the videos are intentionally added without caption (i.e. for language learning purposes.)
- Text:
  - Headings Included
    - Are defined throughout the text
    - Are nested appropriately without skipping heading levels
  - Tables
    - Include a defined, repeating header row
    - Include a simple structure without merged cells
    - Are used only for appropriate tabular data
  - Lists are defined appropriately as ordered or unordered lists
    - Unordered lists are used for lists that do not need to be displayed in any particular order
    - Ordered lists are only used for lists that do need to be displayed in a particular order, such as step by step instructions
  - Clickable links are attached to text that describes where the link leads
  - Text emphasis is indicated by bold or italics
  - Color is not used to convey meaning
  - Links and Hypertext
    - Avoid uninformative link phrases
    - Consider the readability and length for URLs as links.
    - The link text must have a 3:1 contrast ratio from the surrounding non-link text.
- Self-Assessments:- opportunities are provided to assess learning without a graded penalty before completing graded assignments/exams (i.e Ungraded, multiple-attempt quizzes might be made available before exams for self-assessment and study purposes or Assignment grading criteria might be made available with opportunities for peer review before final submission).
- Activities- options are provided for completing activities in multiple formats \*where appropriate (i.e. discussion boards might allow students to respond in varying formats such as text, audio, or video; creative assignments might allow students to complete the activity in varying formats such as websites, essays, or other artistic expression).

## Cultural Considerations

- Language Support / Translations Available?
- Cultural Correlations (local, state, national, international)?

- Available in language used in the current education environment?

## Cost and Impact

- Any cost for use or adaption/creation?
  - Cost for the institution/department for platforms needed to implement OER
    - Pedagogy tools and platforms (communication, interactivity, adaptive learning, etc.)
    - Hosting tools and platforms (repository, creation platform, website, etc.)
  - Faculty Time/Resources
    - Additional redesign time needed to implement OER
    - Learning Management System course redesign
    - Syllabus/Outcomes redesign
    - Additional creation time needed for a successful OER implementation, i.e. Creation of new ancillary materials
    - Revision of the evaluated OER
  - Additional support time needed to implement OER
    - Hosting (librarians, IT)
    - Design (instructional designers)
  - Sustainability: Cyclical period of time for revisions/redesigns (3 years? 5 years?)
- Total Institution Implementation Costs: \_\_\_\_\_
- Cost Avoidance/Potential Student Savings/Cost Comparison Rate:  
[Existing or Comparable Commercial Textbook Cost \_\_\_\_\_  
X Average Student Enrollment Each Term/Semester: \_\_\_\_\_] - Cost per Student  
(for any required support/platforms/content): \_\_\_\_\_ = Total \_\_\_\_\_
- Free to Access?
- Average student enrollments affected by implementation per semester/quarter: \_\_\_\_\_
- Cost savings in one year (academic? calendar?): \_\_\_\_\_

## Resource/Subject Alignment

- Course Association: \_\_\_\_\_
  - Intended Purpose matches course education needs?
  - Learning outcomes comparable to similar course resources?
  - Appropriate content for Target Audience?
  - Prerequisite Course Resource: \_\_\_\_\_



- Continuing Course Resource: \_\_\_\_\_
- Accurate and Reliable:
  - Content clear, concise, and coherent?
  - Content relevant and appropriate to purpose/learning outcome
- Content achieves or exceeds pre-set criterion-referenced standard:
  - Author provides learning objectives and outcomes relevant to discipline and course level.
  - User/Student will be able to respond or interpret content appropriately
  - Stimulates motivation or engagement in learning
  - Content is either (i) Essential or (ii) Not-essential but useful [Lawse (1975)]
  - Audience could understand the topic well and easily
  - Content adequate and not overloading of information
  - Ability to navigate through content as an individual?
  - Visual elements used were not distracting from learning?
  - Follows current or best practices in pedagogical methods?
  - Biases or potential conflicts of interest identified?
- Faculty verified use in course?
- Available faculty and student reviews and link to review?

## Ethical Use of Data

- Data Collection:
  - Is data being collected?
    - What type of data is collected: \_\_\_\_\_
  - Who has ownership of the data: \_\_\_\_\_
  - Is the data collection transparent?
- Data Privacy:
  - Do students have input on data collected?
  - Are the students able to adjust tracking?
  - How is the data made available?

# Appendix A -US Laws and Regulations to Consider

**Caution: There is a focus on U.S. Law here.**

US accessibility legal requirement expressed in [Section 508](#) of the Rehabilitation Act of 1973, and international accessibility guidelines of the World Wide Web Consortium (W3C)'s [Web Content Accessibility Guidelines \(WCAG\)](#)

1. provides flexibility in the ways:
  - a. information is presented,
  - b. students are engaged,
  - c. and students respond or demonstrate knowledge and skills
2. Reduces:
  - a. barriers in instruction,
  - b. provides appropriate accommodations,
  - c. supports, and challenges, and maintains high achievement expectations for all students, including students with disabilities and students who are limited English proficient.

Goal: Provide access to information comparable to the access available to others.

## [Higher Education Opportunity Act of 2008](#) (HEOA)

The HEOA supports the academic freedom of faculty to select high quality course materials for their students while imposing several new provisions to ensure that students have timely access to affordable course materials at postsecondary institutions receiving Federal financial assistance. These provisions support that effort and include the following:

- When textbook publishers provide information on a college textbook or supplemental material to faculty in charge of selecting course materials at postsecondary institutions, that information must be in writing (including electronic communication) and must include *f* the price of the textbook; *f* the copyright dates of the three previous editions (if any); *f* a description of substantial content revisions; *f* whether the textbook is available in other formats and if so, the price to the institution and to the general public; *f* the separate prices of textbooks unbundled from supplemental material; and *f* to the maximum extent possible, the same information for custom textbooks.
- To the maximum extent practicable, an institution must include on its Internet course schedule for required and recommended textbooks and supplemental material *f* the International Standard Book Number (ISBN) and retail price; *f* if the ISBN is not available, the author, title, publisher, and copyright date; or *f* if such disclosure is not practicable, the designation "To Be Determined." If applicable, the institution must include on its written course schedule a reference to the textbook information available on its Internet schedule and the Internet address for that schedule.
- A postsecondary institution must provide the following information to its college bookstores upon request by such college bookstore: *f* the institution's course schedule for the subsequent academic period; and *f* for each course or class offered, the information it must include on its Internet course schedule for required and recommended textbooks and supplemental material, the number of students enrolled, and the maximum student enrollment.

- Institutions disclosing the information they must include on their Internet course schedules for required and recommended textbooks and supplemental material are encouraged to provide information on *f* renting textbooks; *f* purchasing used textbooks; *f* textbook buy-back programs; and *f* alternative content delivery programs.

The Disability Act 2005 defines Universal Design as:

1. The design and composition of an environment so that it may be accessed, understood, and used
  1. To the greatest possible extent
  2. In the most independent and natural manner possible
  3. In the widest possible range of situations
  4. Without the need for adaptation, modification, assistive devices or specialized solutions, by any persons of any age or size or having any particular physical, sensory, mental health or intellectual ability or disability, and
2. Means, in relation to electronic systems, any electronics-based process of creating products, services or systems so that they may be used by any person.

References:

<http://enact.sonoma.edu/c.php?g=789377&p=5650604>

<https://www.section508.gov/manage/laws-and-policies>

<https://www.w3.org/WAI/standards-guidelines/wcag/>

<https://www2.ed.gov/policy/highered/leg/hea08/index.html>

[https://www.higheredcompliance.org/wp-content/uploads/2018/10/HEOA\\_DearColleagueLetter\\_December2008.pdf](https://www.higheredcompliance.org/wp-content/uploads/2018/10/HEOA_DearColleagueLetter_December2008.pdf)

# Appendix B: Resources / Examples

Example Rubrics or other documents that may have aided in creating this national rubric and best practices:

1. [Achieve's Open Educational Resources Evaluation Tools Handbook](#)
2. [Achieve Rubrics for Evaluating OER Objects](#) (Achieve and OER Commons)
  - a. Adaption of Achieve- Comprehensive OER Evaluation Tool, [http://libguides.ccac.edu/ld.php?content\\_id=48740579](http://libguides.ccac.edu/ld.php?content_id=48740579)
3. [DigiTex \(SAMPLE\) Checklist for Evaluating OER](#)
4. [iRubric Evaluating OER Rubric](#)
5. Kirkwood Community College [OER Evaluation Checklist](#)
6. [BCCampus Self-Publishing Guide: Textbook Reviews](#)
  - a. [Affordable Learning Georgia OER Evaluation Criteria](#)
7. B.C. Open Textbooks Review Rubric: <https://open.bccampus.ca/use-open-textbooks/>
8. [Open Textbook Library Review Criteria](#)
9. [Quality Matters](#)
  - a. Standards Points Course Overview Introduction: <https://www.qualitymatters.org/qa-resources/rubric-standards/higher-ed-publisher-rubric>
10. [TIPS Framework](#)
11. David Wiley on efficacy vs. effectiveness: <https://opencontent.org/blog/archives/4027>  
quality vs. effectiveness: <https://opencontent.org/blog/archives/3821>
12. Ecampus Ontario: <https://openlibrary.ecampusontario.ca/suggestion-for-the-collection/> (Suggestion for the Collection)
13. Review an Open Educational Resource: <https://openlibrary.ecampusontario.ca/review-an-oer/>
14. Answer Shark: <https://answershark.com/writing/non-fiction-review/how-to-write-textbook-review.html>
15. Course material evaluation worksheet (Virginia Tech) <http://hdl.handle.net/10919/95875> © Anita Walz CC BY
16. NCSU Universal Design Overview and Principles: <http://enact.sonoma.edu/c.php?g=789377&p=5650608>
17. UNC Book Reviews: <https://writingcenter.unc.edu/tips-and-tools/book-reviews/>
18. Open Oregon Educational Resources: <http://faq.openoregon.org/accessible-content>
19. TN Textbook Review: [https://www.tn.gov/content/dam/tn/education/textbook/txtbk\\_review\\_process.pdf](https://www.tn.gov/content/dam/tn/education/textbook/txtbk_review_process.pdf)

20. Wiki OER Handbook- Considerations:  
[https://wikieducator.org/OER\\_Handbook/educator/Introduction/Considerations](https://wikieducator.org/OER_Handbook/educator/Introduction/Considerations)
21. Curating OER - Accessibility Checklist: <https://tlp-lpa.ca/oer-toolkit/collaborating>
22. Checklist for Evaluating Course Materials  
Faculty:  
[https://docs.google.com/document/d/1J0oT1xZCciyXtk1I7MB\\_r9saVDHlpQD7Ml5Ep9uCLfM/edit](https://docs.google.com/document/d/1J0oT1xZCciyXtk1I7MB_r9saVDHlpQD7Ml5Ep9uCLfM/edit)  
Administrator:  
<https://docs.google.com/document/d/1bK-wRZp6S2uzVP3f0xj7ver4G3ajFpjwOBBFZJd875o/edit#>  
Student:  
<https://docs.google.com/document/d/18OLNp9AylWdeyifVL10w82fxmnBwCskJa34Pr46q2SQ/edit>
23. UDL Connection: [http://udloncampus.cast.org/page/media\\_oer#.WbilfMiGM2x](http://udloncampus.cast.org/page/media_oer#.WbilfMiGM2x)
24. Quality Learning and Teaching (QLT) Instrument:  
<http://courseredesign.csuprojects.org/wp/qualityassurance/qlt-informal-review/>
25. FLOE Project: <https://handbook.floeproject.org/>
26. The Community of Inquiry theoretical framework:  
<https://coi.athabascau.ca/coi-model/>
27. Good practice in undergraduate education:  
<http://www.lonestar.edu/multimedia/sevenprinciples.pdf>
28. UMN: <https://canvas.umn.edu/courses/106630/pages/considering-peer-review>
29. Gall, Meredith. D. (1981). Handbook for Evaluating and Selecting Curriculum Materials. Allyn and Bacon: Boston. Retrieved from  
<http://hdl.handle.net/10919/79783>
30. Open SUNY Textbook Peer Review Guidelines. [2019]. Retrieved from  
<https://textbooks.opensuny.org/wp-content/uploads/OpenSUNYTextbookReviewGuide.pdf>
31. Ashok, Apurva & Hyde, Zoe Wake. (2019). Peer Review Process Guide. In Rebus Guide to Publishing Open Textbooks (So Far). Retrieved from  
<https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/cha/pter/peer-review-process-guide>
32. AAUP Handbook Best Practices for Peer Review. (2016). Retrieved from  
<https://www.equinoxpub.com/home/wp-content/uploads/2016/09/AAUP-Best-Practices-for-Peer-Review-.pdf>
33. [OER Evaluation Rubric](#)
34. [Accessibility Toolkit, 2nd Edition](#) - Includes an [Accessibility Checklist](#)
35. [OER Accessibility LibGuide](#) - Delgado Community College Libraries LibGuide includes Accessibility for Course Design, Accessibility Checklists, Accessibility Tools, Screen Readers, Creating Access

36. [ALG Accessibility Guides](#): faculty as the intended audience, also includes a checklist and set of accessibility checkers, by Tiffani Reardon, 2020
  - a. [OpenEd 2020 Accessibility Guides](#) (based on ALG ones)
37. Rubric from IU <https://libguides.ithaca.edu/c.php?g=863821&p=7082303>
38. [RLOE Sustainability Guide](#)

## Appendix C: Additional Resources

Lawshe, C.H. (1975). A quantitative approach to content validity. *Personnel Psychology* , 28 (4),563-575. Retrieve at,  
[http://www.bwgriffin.com/gsu/courses/edur9131/content/Lawshe\\_content\\_valdity.pdf](http://www.bwgriffin.com/gsu/courses/edur9131/content/Lawshe_content_valdity.pdf)

CEMCA, 2014. The TIPS Framework Version-2.0 : Quality Assurance Guidelines for Teachers as Creators of Open Educational Resources is made available under a Creative Commons Attribution Share-Alike 4.0 Licence  
(international):<http://creativecommons.org/licenses/by-sa/4.0>. ISBN: 978-81-88770-26-7  
[http://oasis.col.org/bitstream/handle/11599/562/TIPSFramework\\_Version%202%5b1%5d%20Copy.pdf?sequence=1&isAllowed=y](http://oasis.col.org/bitstream/handle/11599/562/TIPSFramework_Version%202%5b1%5d%20Copy.pdf?sequence=1&isAllowed=y)

# Appendix D: Contributor Statements

Please let the readers know who you are and what brings your interest to OER Review Standards and Approval Rubrics.

1. Rebel Cummings-Sauls, Florida Academic Library Services Cooperative Director of Digital Services and OER. FL statute requires that we work to develop these standards and approval rubric. In addition, the faculty and staff at FL institutions really do want to use an approved resource and are very excited about having a resource that is approved and aligns with state standards. Working with this group I hope to work towards these goals.
2. Sara Benson, University of Illinois Copyright Librarian. I'm interested to see what we come up with. UIUC has started publishing OER and we generally have internal standards for publication of any kind of manuscript, but these standards could be helpful to the process.
3. Marian Smith, Eastern Florida State College. Co-chair OER Workgroup. Interested in best practices to guide faculty in the OER review/approval process.
4. Kathy Essmiller, Oklahoma State University. Provide faculty with a resource to help them scope their exploration in a way that supports and honors their expertise and also respects their time.
5. Erik Christiansen, Assistant Professor/Librarian, Mount Royal University (Psychology, Health and Phys Ed., Counselling + Music Conservatory). Excited about the rubric! Areas of research/interest are OER (measuring openness), web usability, SoTL, online learning.
6. Daphne Tseng , Instructional designer at Idaho State University. Searching for ways to convince our faculty to use OER.
7. Christina Huffaker, Utica College, Reference & Access Services Librarian. Really hoping to get the OER momentum moving on our campus! The more I am involved in OER initiatives, the more I can share with those on campus.
8. Judith Sebesta, Executive Director, Digital Higher Education Consortium of Texas. We are hoping to lead the development of OER for Career & Technical Education and want to "bake into" the process standards for efficacy assurance. Thanks for the opportunity!
9. Tiffani Reardon, Program Manager for Affordable Learning Georgia, University System of Georgia. I co-run a grant program that funds the development and use of OER, and with an instructional design background, I am very interested in seeing a set of review standards for better quality OER coming out of our programs as well as elsewhere. I'm also a PhD student with plans to do my dissertation on OER-related topics, and am interested in a set of review standards for that as well.
10. Allegra Swift, Scholarly Communications Librarian for UC San Diego. We hope to incentivize campus depts and centers to collect their faculty-created OER, communicate impact, and increase the value of these works in the tenure and promotion process. I'm interested in framing a broader concept of what could count as OER and to help faculty



who publish these works get credit and communicate their impact. Rubrics to evaluate and communicate quality will support these efforts.

11. Jim Paradiso, Instructional Designer / Program Coordinator - Affordable Instructional Materials (AIM), University of Central Florida, excited to participate any way I can.
12. Bryan McGeary, Learning Design and Open Education Engagement Librarian, Pennsylvania State University. I'm interested because I would like us to have standards that would improve the quality of the OER that we're producing at Penn State and also to help faculty with making decisions when they're reviewing OER.
13. Jeff Gallant, Program Director, Affordable Learning Georgia. We built out our grant program and the review process back in 2014, but when it comes to peer reviewed materials, we've partnered with the UNG Press, who took a largely monograph-centered peer review process through the Association of University Presses and moved it into the open textbook world. This happened in 2011-2013 as the USG and UNG piloted the creation of a peer-reviewed open textbook! We're now in the process of creating and facilitating the review of nine Organizational Leadership texts.
14. Mark Lane, OER Production Manager, Oregon State University. I'm interested in exploring ways to evaluate OER.
15. Hanni Nabahe, OER Specialist, University of Virginia. Our program is fairly new, about a year old. We have conducted a survey of our students and the impact that the cost of required course materials has been for them (spring 2020, right before the pandemic hit). Over the summer we started an OER review pilot for our liaisons and they have been using a rubric that combines several of those others have put together.
16. Tyler Dunn, Open Education Librarian at Fort Lewis College in Durango, Colorado.
17. Sheri Edwards, Florida Atlantic University, OER Coordinator, and here to learn and produce!
18. Ariana Santiago, OER Coordinator, University of Houston Libraries. Mostly here to learn and see how I can help/what would be most useful for faculty at UH.
19. Amanda Larson, Affordable Learning Instructional Consultant, The Ohio State University. Excited about developing metrics that will make it easier for folks to evaluate OER - a lot of the hurdle with instructors getting them to actually dive into the OER that exists in their field - having a rubric they could use would make this easier. I think it would also help provide criteria for when OER needs updated/or could be weeded from an active collection/archived.
20. Cindy Gruwell, Assistant Librarian and Coordinator of Scholarly Communication. I just started this position a couple of weeks ago. I have experience both using and creating OER resources and am currently co-adapting a textbook. My library is looking to expand the use and creation of OER, but one of the hurdles in working with faculty is to assure them about the quality of resources.
21. Nikki Cannon-Rech, Research Services Librarian and ALG Library Champion for Georgia Southern University. I help educate faculty about OER materials, and quality is always a hurdle, as is time.
22. Hilary Baribeau, Scholarly Communications Librarian, Colby College, Lewiston, ME- I have previously developed OER assessment rubrics for grant applications and materials

but definitely think they can be improved upon! Looking forward to learning from others and contributing to the group.

23. Roxanna Palmer, Faculty Librarian, Hillsborough Community College, Tampa, FL - I am an advocate for Open Education and OER adoption. As a Librarian at HCC I work to assist faculty who are interested in creating or adopting OER for their courses. I am also a copyright nerd and recently completed the Creative Commons Certificate to better understand licensing of open content.