

OER KPIs Assessment Collection

Massachusetts OER Advisory Council
and the DHE

June 26, 2023 ZOOM meeting

Presenters

1. Robert Awkward, Ph.D., Assistant Commissioner for Academic Effectiveness, Mass. DHE
2. Suzanne Smith, Director of Research and Evaluation, Mass. DHE
3. Jacalyn Kremer, Dean of the Library Fitchburg State, OER Advisory Council member and co-creator of the Massachusetts OER KPI Assessment Guide
4. Connie Strittmatter, Strategic Projects Librarian, Fitchburg State, and co-creator of the Massachusetts OER KPI Assessment Guide

Agenda for Today's Meeting

- 1. Brief Overview including the goals of this meeting**
- 2. Review of companion guide *OER KPI Assessment MA Guide Updated June 2023* including changes from last year and roll-out of 2 KPIs**
- 3. Demonstration of data entry process & changes to collection**
 - Important Notes on Data Collection
 - Describe the current plan for the data collection process will look like
 - Problems with data collection last year
- 1. Time for questions and who to contact moving forward**

Why are We Doing This?

The Equity Agenda

6/22/2021, Board of Higher Education unanimously accepted the motion of the Academic Affairs Committee that stated the Commissioner will work with the OER Advisory Council and the public institutions to implement the *Course Marking Implementation Guidelines* and the *OER Key Performance Indicators*.

7/27/2021, Letter from Commissioner Carlos E. Santiago re: OER Course Marking Implementation and OER Key Performance Indicators, [Appendix A](#) of guide

9/1/21, Letter from Bob Awkward to MA OER Advisory Council Re: OER Key Performance Indicators, [Appendix B](#) of guide

11/23/2021, Letter from Patricia Marshall, Former Deputy Commissioner for Academic Affairs & Student Success re: Implementing OER Course Markings and Key Performance Indicators, [Appendix C](#) of guide

OER KPI Assessment Guide

Available on the DHE website at Open Educational Resources

[https://www.mass.edu/strategic/documents/OER-KPI-Assessment-MA-Guide-Updated%20June%2026%202023.docx%20\(4\).pdf](https://www.mass.edu/strategic/documents/OER-KPI-Assessment-MA-Guide-Updated%20June%2026%202023.docx%20(4).pdf)

Review of Main Features of the Guide

Eight sections to the document:

- Table of Contents
- Purpose of the guide
- Definitions
- Table listing Key Performance Indicators in relation to COUP Framework
- Important Notes on Data Collection
- Calculating the Key Performance Indicators
- Suggested timeline
- Examples of work at MA Public Colleges and Universities
- Appendices

Definitions

Important definitions for the first year:

- **Reporting Year** – July 1 – June 30. Academic reporting year is as follows, Summer 2, Fall, Winter, Spring, Summer 1. Example: For AY2023 (July 1, 2022 – June 30, 2023).
- **Enrollments** – the duplicated count of students enrolled in course sections
- **Low Cost Materials** – Those course sections that have materials that cost \$50 or less in total. See Definition of OER (below) and the materials included in that definition.
- **No Cost Materials** – Those course sections that have \$0 materials cost. That is, it is free to the student including library and free resources. See Definition of OER (below) and the materials included in that definition.
- **Professional Development** – Includes faculty and staff workshops, communities of practice, information sessions or other activities in which OER is a topic.

Definitions

MOST Important Definition

Course Sections- An individual undergraduate course offering distinguished from other offerings by date, time, location, instructor, and delivery mode.

Include credited undergraduate course sections. Include early college, developmental course sections and art, studio, and PE courses sections which may not typically have required textbooks.

Exclude credited course sections like labs, independent studies, dissertations, practicums, internships, externships, and directed studies. Exclude **all** non-credited courses sections and workforce development offerings.

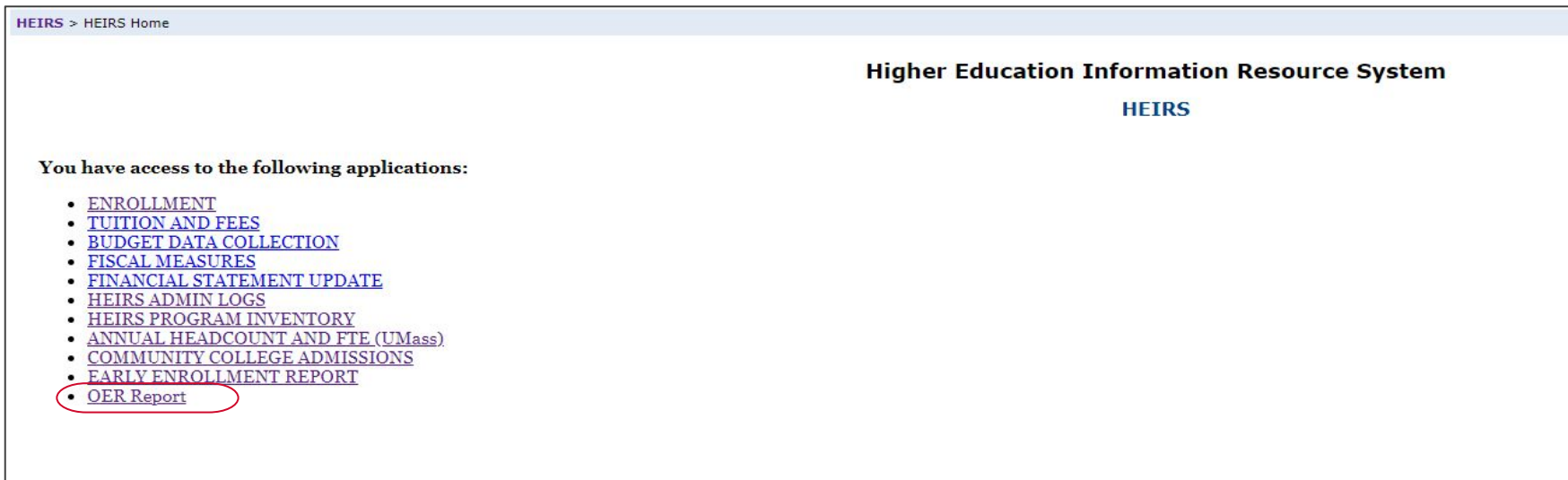
Changes to Guide from Last Year

- Substituted enrollments for students to reflect that data submitted is duplicated student counts
- Clarified definition of course sections
- Updated reporting timeframe Aug 1 to Sept 15

Comprehensive list of changes is available [HERE](#).

How Will Data be Collected?

1. Data Collected in an Aggregate Report through HEIRS:
2. Data Collection open from **8/1-9/15**
3. Dates are meant to align with Annual file submission



HEIRS > HEIRS Home

Higher Education Information Resource System
HEIRS

You have access to the following applications:

- [ENROLLMENT](#)
- [TUITION AND FEES](#)
- [BUDGET DATA COLLECTION](#)
- [FISCAL MEASURES](#)
- [FINANCIAL STATEMENT UPDATE](#)
- [HEIRS ADMIN LOGS](#)
- [HEIRS PROGRAM INVENTORY](#)
- [ANNUAL HEADCOUNT AND FTE \(UMass\)](#)
- [COMMUNITY COLLEGE ADMISSIONS](#)
- [EARLY ENROLLMENT REPORT](#)
- [OER Report](#)

How Will Data be Collected?

HEIRS

HEIRS / OER Report

Higher Education Information Resource System

Select Year and Institution

Year: Academic Year 2022-2023

Institution: Cape Cod Community College

Next

Important Notes on Data Collection

1. If you have no data to report for **all** of the KPIs, please login, check the “No Data to Report” box and click on submit.

[HEIRS](#) / [OER Report](#) / [Worksheet](#)

Higher Education Information Resource System

Key Performance Indicators for Open Educational Resources Report

Year : Academic Year 2022-2023

[Edit Mode](#) | [Report Mode](#) | [Select Another Year](#)

Institution : Cape Cod Community College

[Please review the instructions before entering the data](#)

Sign-off

Save

Print

 No data to report

If you have not yet signed off on your data submission click Save to retain your work in progress, or click Sign Off to submit your data.

KPI-1B: Institutional investments in Open Education

Important Notes on Data Collection

2. If you have no data to report for a specific KPI, enter 0 in the box provided.

KPI-4: Number of faculty/staff participating in professional development in No/Low training and education	
KPI-4.1 Number of Professional Development Opportunities	<input type="text" value="0"/>
KPI-4.2 Number of Professional Development Opportunities hours offered	<input type="text" value="0"/>
KPI-4.3 Number of faculty/staff participating in professional development opportunities	<input type="text" value="0"/>
KPI-4.4 Total number of faculty/staff staff hours spent in professional development opportunities	<input type="text" value="0"/>

Important Notes on Data Collection

2. If you have no data to report for a specific KPI, enter 0 in the box provided.

Exception: KPI 2.3 and KPI 3.3 require an entry > 0

DATA TO REPORT TO THE STATE

- KPI 2.1: Number of course sections with No Cost materials
- KPI 2.2: Number of course sections with Low Cost materials
- KPI 2.3: Total number of **ALL** course sections offered regardless of cost

DATA TO REPORT TO THE STATE

- KPI 3.1: Number of enrollments in No Cost course sections
- KPI 3.2: Number of enrollments in Low Cost course sections
- KPI 3.3: Number of enrollments in **ALL** course sections regardless of cost

Important Notes on Data Collection

Exception: KPI 2.3 and KPI 3.3 require an entry > 0

DATA TO REPORT TO THE STATE

- KPI 2.1: Number of course sections with No Cost materials
- KPI 2.2: Number of course sections with Low Cost materials
- KPI 2.3: Total number of **ALL** course sections offered regardless of cost

The screenshot shows the HEIRS OER Report interface. The main content area displays the title "Higher Education Information Key Performance Indicators for Open Educational Resources" and the academic year "Year : Academic Year 2022-2023". There are navigation links for "Edit Mode", "Report Mode", and "Select Another Year". The institution is identified as "Cape Cod Community College". A warning dialog box is overlaid on the screen, titled "OER Report - Sign-off Warning". The warning message states: "WARNING! Answer to KPI 2.3 is equal to 10 and is not within 10% limit of previous year value of 1060 reported in ANN file; Answer to KPI 3.3 is equal to 10 and is not within 10% limit of previous year value of 3828 reported in ANE file;". Below the warning, it asks "Would you like to go back and fix the number OR sign-off existing numbers?". There are two buttons: "Back to the form" and "Sign-off". A "Sign-off" button is also visible in the bottom right corner of the interface.

Important Notes on Data Collection

3. If your institution does not distinguish between no cost (\$0) and low cost (<\$50) course sections, **report all of the data in the *low* category**. Enter 0 in the no cost category. This applies to KPI 1, 2, 3, 5, and 6.

KPI-3: Percentage of Enrollment in No/Low cost sections	
KPI-3.1 Number of enrollments in No Cost sections	<input type="text" value="0"/>
KPI-3.2 Number of enrollments in Low Cost sections	<input type="text" value="0"/>
KPI-3.3 Number of enrollments in all sections offered at your institution	<input type="text" value="0"/>

Questions & Comments

If you have questions about data collection process, please contact Suzanne Smith at ssmith2@dhe.mass.edu.

If you have questions about OER or Key Performance Indicators policy, please contact Bob Awkward at rawkward@dhe.mass.edu.

Massachusetts OER Advisory Council Members

A complete list of the OER Advisory Council members at each institution is available @

<https://www.mass.edu/strategic/oer.asp>

Thank you!