

Appendix A

OER Implementation Insights from District Leaders

ISTE and New America spoke with several school district leaders from around the country who shared aspects of PK-12 OER implementation that they believe deserve critical attention. Although each approached OER through different entry points, the consensus from the district leaders is clear: Ensuring the longevity of OER cannot be achieved by simply examining which proprietary textbooks can be substituted with openly licensed ones. This effort requires developing systemic reform strategies and supporting teachers through networked collaboration.

1. Initiating Change Through the #GoOpen District Launch Packet: Carlsbad Unified School District

In 2016, Superintendent Benjamin Churchill of Carlsbad Unified School District learned that many other Southern California districts, such as Vista Unified School District, had chosen to use OER as a solution to static, proprietary textbooks that could not be regularly updated to match rapidly changing teaching strategies and student expectations. Therefore, his district joined the #GoOpen movement in late 2016. Churchill describes the #GoOpen District Launch Packet as “literally a perfect place to launch from” as the resource “provided a good roadmap” of how to begin implementing OER. Churchill especially benefited from two specific sections of the launch packet. First, in an introductory section of the launch packet, he discovered exactly how to assess whether his district is prepared to #GoOpen. With this information in mind, he realized that Carlsbad was approaching the end of an ELA curriculum cycle and already had some internal capacity for OER adoption, as many teachers were independently using openly licensed learning materials in their classrooms. This observation solidified his decision to invest in OER. Phase 2 of the launch packet helped Churchill build an OER implementation team and delegate specific responsibilities. He took a step further from the steps outlined in the

launch packet by hiring a “Teacher on Special Assignment” (TOSA), who spent a year curating OER appropriate for Carlsbad’s needs and worked with schools to implement the new materials. Churchill recognizes how the launch packet enabled him to make #GoOpen a sustainable initiative in his district and hopes to replicate the process in the future as additional opportunities to use OER present themselves.

2. Mentoring Other Educators by Hosting a Regional Summit: Tullahoma City Schools

When Tennessee renewed its social studies standards in 2012, district leaders at Tullahoma City Schools had an opportunity to pilot the use of openly licensed learning materials through nine courses in the subject. After observing much success from this pilot, scaling the OER initiative to several other courses and mentoring other districts about OER on a one-on-one basis, Superintendent Dan Lawson of Tullahoma City Schools led the June 2017 #GoOpen Regional Summit in Tullahoma, Tennessee. Attended by approximately 230 teachers, school administrators, and district leaders from Alabama, Mississippi, and Tennessee, the regional summit featured sessions that defined OER, demonstrated uses of existing OER platforms and guided OER team formation for those new to openly licensed materials. Susan Sudberry, Tullahoma’s instructional technology specialist, found great value in the #GoOpen Regional Summit in a Box toolkit during the planning phase of the June summit. She stated that, “Two essential resources contained within the toolkit were the invitation template and links to Google Sites created by other districts who...previously held #GoOpen Summits.” Such resources enabled Tullahoma’s development of a dedicated regional summit

website and registration process. The toolkit also provided a structure for the day to facilitate specialized conversations for each type of attendee.

3. Suggestions for Regional Summit in a Box Toolkit 2.0: Lewis Central Community School District

Josh Allen, technology integration specialist at Lewis Central Community School District in Iowa, remarked that after his district joined the #GoOpen movement in October 2016 to enhance its elementary math curricula with OER, he grew to enjoy opportunities to share his knowledge of OER with other educators. This joy factor led Lewis Central to host #GoOpen Regional Summits on two separate occasions. In preparation for these events, he found the toolkit's notes about keeping the sessions educator-centered and sponsor-neutral, as opposed to vendor- or OET-centered, especially helpful, as it fostered a comfortable environment for genuine dialogue among participants about OER. However, he believes that a second iteration of the guide, developed by an entity independent of the federal government, which includes contact information for established OER content providers, would support districts planning future regional summits. Including content providers, he noted, would help districts new to OER browse what resources are already available.

4. Leveraging OER for Deeper Learning in STEM: Williamsfield Community School District

In 2015, Arne Duncan, the former secretary of education, and Andy Marcinek, former chief open education adviser at the U.S. Department of Education, visited Williamsfield Community School District in central Illinois. Despite its small size, comprised of roughly 100 students, the district was making a big impact through its OER initiatives. Tim Farquer, Williamsfield's superintendent and curriculum director, chose not to purchase outdated mathematics textbooks that were not well-aligned with the state's new standards. He and the district's teachers instead curated OER through a number of online platforms, such as OER Commons, and even created a few of their own. Consequently, Williamsfield's students now demonstrate their mathematics knowledge by

engaging in project-based learning and solving real-world problems. For example, students enrolled in an integrated mathematics course can demonstrate their knowledge of correlation coefficients by building a scatterplot that shows the relationship between exercise levels and HDL cholesterol. Farquer has also reinvested the thousands of dollars saved by curating and creating OER to reinforce the technology infrastructure in his district. With new devices in hand, students enrolled in science courses can access open learning materials provided by prestigious postsecondary institutions around the country that integrate deeper learning principles. In OET's #GoOpen Story Engine, Zack Binder, Williamsfield's PK-12 principal and director of student services, stated that through such experiences, students are "no longer in Williamsfield, Illinois. [They] have the same access to this information that anyone in the world does."

5. Partnerships with Local Universities to Provide Professional Learning Opportunities: Fallbrook Union Elementary School District

Superintendent Candace Singh of Fallbrook Unified Elementary School District in Southern California stated that, "One of the most overlooked aspects of OER is professional learning. Although we compensate them for their additional work, our teachers also give up so much time to curate [OER]. If you're not supporting their efforts by providing [professional learning] in combination with the dynamic materials, OER will soon be dead in the water." Therefore, when the district chose to support its science, mathematics and ELA curricula with openly licensed learning materials, Singh made it a district priority to create a collaborative culture with nearby institutions of higher education. For example, after California adopted the Common Core State Standards, Singh noticed that the way teachers were asked to teach mathematics concepts differed from traditional methods. In turn, her district partnered with faculty from the University of California, Irvine, Math Project to reinforce teachers' content and pedagogical

knowledge and supplement curricula with OER. Furthermore, by partnering with the University of San Diego Mobile Technology Learning Center, Fallbrook's teachers have learned best OER curation practices. After three years of participating in such partnerships and observing increases in student achievement, Singh is now making sure that OER adoption can be scaled to every school in the district. "You can't have little pockets of excellence," she noted.

6. Taking a Coordinated Team Approach to Ensure OER Sustainability: Liberty Public Schools

Liberty Public Schools in Missouri continues to be a pioneer in the OER movement. OET recognized Liberty's coordinated team approach by featuring the district on both the #GoOpen Story Engine and #GoOpen District Launch Packet. Under guidance from OET and a #GoOpen Ambassador District, Columbus Municipal School District, Liberty began its OER journey in 2015 by forming teams of diverse expertise, featuring executive district leaders, departmental directors, school administrators, and teacher leaders. As more courses chose to adopt OER each school year, additional teacher leaders were brought onboard. These teacher leaders were then responsible for reviewing existing materials, determining the necessary OER and submitting a budget proposal.

Dr. Jeanette Westfall, the director of curriculum, instruction, and professional development, finds that this team approach keeps the district's OER efforts sustainable in two major ways. First, by investing in OER, Liberty creates room in its budget to fund teacher professional learning opportunities and financially compensate teacher leaders for their additional roles. Second, because teacher leaders carry out genuine conversations about content and pedagogy, they become more knowledgeable about how to teach each subject. Consequently, Liberty's student achievement measures have been on the rise.

7. Student Privacy Considerations: Chesterfield County Public Schools

Chesterfield County Public Schools in Virginia joined the #GoOpen movement as part of its Design for Excellence 2020 initiative, a districtwide plan to build students' 21st century skills such as problem-solving, technology proficiency and global citizenship. Although this comprehensive vision led to the implementation of several classroom digital tools, Chesterfield's teachers and district leaders found their internal legal review of OER providers' privacy policies too time-consuming and ultimately unusable. Therefore, to accelerate this process, district leaders developed a new standard terms of service and data privacy contract, which ensures that any vendor's web-based OER are FERPA-compliant. Gillian Wilson, technology integrator for Chesterfield County Public Schools, explained that "teachers find this [new process] invaluable. It keeps our students safe and has streamlined our [OER] application approval process." Chesterfield is currently assisting other Virginia districts adopt a version of its terms of service and data privacy contract. In doing so, the district hopes to influence OER providers' student privacy considerations and that other educators benefit from a quicker OER approval process.