

Introduction to OER Strategic Plan Templates

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Defining Strategic Plans

To our group's knowledge, a *strategic plan* template for open educational resources (OER) initiatives does not already exist. There is the [OER policy Development toolkit](#), and perhaps for this reason there are ready examples of OER *policies* available. A policy is a “high-level overall plan embracing the general goals and acceptable procedures especially of a governmental body” ([Merriam Webster](#)). Policy should not be used interchangeably with strategic plans because they mean and do different things.

Strategic planning is a term borrowed from the business world, defined as “an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy” ([Wikipedia](#)). Strategic plans are generally advanced within a specific time frame, while policies are not usually time-bound. A strategic plan can also be thought of as a “structured, organized thought process to identify and consider potential threats, disruptions, and opportunities” ([Nicolas Kachaner, Kermit King, and Sam Stewart](#)). The strategic plan isn't a list of important things, but rather an agreement about actions to take during a set period of time to reach a common goal.

An OER strategic plan would advance an OER initiative within an organization and ideally tie into the institution's larger strategic plan, mission, and vision (for example, OER is mentioned under Affordability in [Linn-Benton Community College's strategic plan](#)). Institutions are encouraged to discuss what types of documents (policies, plans, resolutions, procedures, goals, etc.) best suit your local OER initiative.



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Best Practices for Strategic Plans

Advice on strategic planning abounds. OER advocates may want to seek out colleagues who have strategic planning experience or hire an external consultant, if funding is available. It may even be helpful to seek out colleagues who hate strategic planning in order to find out about past practices that were unsuccessful at your institution.

Some best practices for strategic planning include:

- Start with an **organizational scan** of your organization's direction and capacities. This may take the form of a SWOT (strengths, weaknesses, opportunities, and threats) analysis (Strategic Council of Nonprofits, 2019).
 - How does the plan for OER relate to other institutional documents such as mission and vision statements, or overall institutional strategic or academic plan?
 - What is already happening on campus? How do you scale this to an institution of your size?
 - What resources are already available?
 - What workflows or best practices have already been adopted?
 - What kind of approach has worked best in the past in your institutional culture (e.g. top-down vs grass-roots)?
- Distinguish your *objective*, *strategies*, and *actions* (Kenny, 2018).
 - Your **objective** is what you are trying to achieve. For example, *51% of faculty adopt OER in at least one of their courses*.
 - Your **strategy** advances your objective. For example, *faculty support through OER grants*.
 - Your **action** ensures implementation. For example, *offer paid training opportunities for faculty interested in OER*.
 - *Sustainability or planned ending for the initiative*.
- Participants, including individuals and departments, are clear about their **roles** (Reeves, 2007/2008) and know the process by which they will be **accountable** (through check-ins or assessment).
- Strategic plans often have a set **time period**, like five years. However, they require continuous planning, adaptation, and communication between stakeholders and responsible parties to ensure their relevance and success, so **yearly or monthly reviews/updates** can help keep the plan relevant and the actors accountable (Kachaner et al., 2019).
 - Certain goals may best suited for long term, medium term, or short term planning (Kachaner, King, & Stewart, 2019).
 - Metrics of success are continually monitored and participants no longer expend energy on actions that aren't working (Reeves, 2007/2008)



- Identify how to make actions **sustainable** if they are effective by increasing staff capacity, earmarking budget funds, etc.

How to Use These Tools

This project resulted in two CC BY-licensed templates. Institutions can create copies of the templates (under the “file” menu in Google Docs) that they can adapt to meet their own needs. Not all pieces are needed or relevant for all institutions and audiences.

Our team also compiled a list of [Open Source Graphic Design Tools \(DRAFT\)](#) that may be useful when creating planning documents.

[Internal planning and reporting template](#)

This is a starting place for OER leaders to identify stakeholders, costs, metrics for success, and tie-ins with larger institutional goals. We recommend that you start with this document and then distill to your communications/marketing document.

Examples:

- [Project Plan and Reporting Template](#) by the CSU Affordable Learning Solutions Initiative (our template is a modification of this document)
- [Affordable Learning Georgia Strategic Plan, July 2017 - July 2020](#)

[External communications/marketing tool outline](#)

This document is intended to communicate the strategic direction of an OER initiative to a larger group of stakeholders, including administrators, funders, students, and faculty. This document should not be exhaustive. For example, you may choose to share only the metrics that are most meaningful to your stakeholder group.

Examples:

- [Wikimedia Strategic Plan](#)
- [Strategic framework for OER at UW-Madison](#)
- [Open Education Strategic Plan 2018-2023](#) for Kwantlen Polytechnic University by Rajiv Jhangiani

Further Reading

Kachaner, N., King, K. & Stewart, S. (2019). [Four best practices for strategic planning](#). Boston Consulting Group.



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Kenny, G. (2018). [Your strategic plans probably aren't strategic, or even plans](#). *Harvard Business Review*.

National Council of Nonprofits. (2019). [Strategic planning for nonprofits](#).

Reeves, D. B. (2007/2008). [Leading to change / making strategic planning work](#). *Educational Leadership*, 65(4), 86-87.

Background

This project emerged from the OER pre-conference “Open Education Advocates: Library Impact and OER Initiatives,” at the ACRL Oregon & Washington Joint Fall Conference 2018 (see [slides from the report-out](#)). The group, led by Amy Hofer of Open Oregon Educational Resources, collaboratively brainstormed potential projects. Voting determined that the project with the most interest was an Adaptable Strategic Plan Template. Amy convened a group from across the two states.

As a first step, the group did a scan of examples of strategic plans in the non-profit and academic communities. They distilled the common elements of these plans to create a spreadsheet for internal plan development and tracking, as well as a communications/marketing tool for sharing a public version of a strategic plan.

The previous project resulting from the OER pre-conference at the ACRL Oregon & Washington Joint Fall Conference 2016 was the [Pacific Northwest OER Directory](#).

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