

Open Practice Program Readiness & Needs Assessment Framework

For OER programs, nonprofits, small businesses, and mission-driven teams building learning, documentation, or support initiatives that need to be easier to enter, easier to manage, and easier to sustain.

Purpose

The Open Practice Program Readiness & Needs Assessment Framework helps value-driven programs assess whether people can find, enter, use, support, evaluate, and sustain an initiative. It was developed from open education and affordable learning practice, but it is intentionally broader than OER alone. The same questions that help an OER program understand faculty support needs can also help a nonprofit clarify a community learning initiative, a small business improve a client education pathway, or a mission-driven team strengthen documentation and support systems.

The framework is designed for programs that care about access, equity, learning, participation, documentation, sustainability, and meaningful impact. It does not assume that the problem is lack of care or lack of motivation. More often, value-driven programs struggle because the work is scattered, under-documented, under-resourced, hard to enter, or difficult to explain.

Why This Framework Exists

Open education offers a useful starting point for understanding the problem. The Open Education Association's National Needs Assessment found that the most important activities for open education practitioners included finding OER and accessing tools and resources, while some of the lowest satisfaction areas involved funding and responding to political and technological change (Allen, 2025). The report also suggests that the field may not need one single new solution as much as better ways to amplify, connect, and use the solutions that already exist (Allen, 2025).

That insight travels beyond OER. Many mission-driven programs are resource-rich but pathway-poor. They have guides, documents, forms, links, trainings, folders, and good intentions, but the people they serve may still struggle to understand what exists, what applies to them, what to do first, and where to get help. In practice, the question is rarely only, "Do we have resources?" The stronger question is, "Can people actually use what we have built?"

Program evaluation research points in the same direction. The IES Program Evaluation Toolkit frames evaluation as a practical process that can include logic models, evaluation questions, data sources, data collection instruments, analysis, and dissemination (Stewart et al., 2021). CAUL's OER Advocacy Toolkit recommends evaluating OER programs by returning to the program's original purpose, identifying what success was expected to look like, and using local evidence such as workshops, attendance, adoption patterns, student engagement, and case studies (Council of Australasian University Librarians [CAUL], 2025).

The OER Starter Kit for Program Managers adds an important data lens. Gallant (2022) describes data as the "peripheral nervous system" of an OER program because it helps programs notice successes, failures, emerging ideas, and urgent issues. The chapter also emphasizes ethical data practices, stakeholder-centered questions, qualitative and quantitative evidence, and keeping program data in one place so it can support decisions over time (Gallant, 2022).

Faculty needs assessment research adds the human layer. Pekala's (2022) Faculty Open Educational Resources Needs Assessment shows why programs should listen before designing support: faculty concerns included quality, currency, discipline fit, time, academic freedom, and uncertainty about what counts as OER. The findings also point to the value of workshops, peer learning, discipline-specific conversations, financial incentives, and hands-on help finding usable resources (Pekala, 2022). Together, these sources point toward a broader design principle: value-driven programs need more than belief, resources, or awareness. They need enterable infrastructure. They need clear entry points, local evidence, participant-centered support, ethical data practices, documentation, and sustainability planning.

What the Framework Helps You See

Use this framework to look across ten domains of readiness. The goal is not to score perfectly. The goal is to see the program clearly enough to design the next layer of support with more precision and care.

- Where people can or cannot enter the program easily
- Whether the program has a clear purpose and change goal
- What participants and stakeholders actually need
- How resources are found, curated, trusted, and used
- Whether there are pathways from interest to implementation
- What labor, funding, and staffing are required
- What evidence can responsibly show reach, impact, barriers, learning, and change
- How equity, ethics, accessibility, consent, and care are built into the structure
- Where the work lives and whether it can survive beyond one person
- How the program notices and responds to change

How to Use the Framework

This framework can be used as a self-assessment, discovery tool, planning guide, facilitated conversation, program review, grant planning resource, or service design tool. A simple use pattern works well:

- Review each domain.
- Identify current strengths.
- Name gaps, risks, or uncertainties.
- Gather evidence.
- Prioritize two or three areas for action.

- Build support structures around the actual needs found.

The framework works best when it is used with curiosity instead of judgment. A gap is not a failure. It is information. And information, when handled well, is where better design begins.

The Framework Table

Use the table below to guide review, planning, and evidence gathering across the ten readiness domains.

Domain	What this means	Guiding questions	Evidence to collect	What stronger readiness looks like
1. Entry & Navigation	People need to be able to find the program, understand what it offers, and know what to do first. This includes websites, forms, onboarding, service menus, learning pathways, and first-touch communication.	Can people find the program easily? Is the invitation clear? Do people know where to start? Are next steps visible? Is the language understandable to someone outside the team?	Website/page review; intake form review; user journey map; inquiry emails; FAQs; search terms; consultation notes; feedback from first-time users.	People can find the door, understand the invitation, and take a first step without needing insider knowledge.
2. Purpose & Change Goals	A program needs a clear reason for existing. This domain clarifies what the program is trying to change, for whom, and why. For OER programs, this may include affordability, access, faculty support, open pedagogy, or publishing. For nonprofits or small businesses, it may include learning, service delivery, client support, documentation, or community impact.	What problem or opportunity is the program responding to? Who is it meant to serve? What does meaningful progress look like? Are goals documented? Are stakeholders aligned around the purpose?	Mission statements; program descriptions; strategic plans; grant goals; stakeholder interviews; logic models; service descriptions; theory of change; past reports.	The program can clearly explain what it is trying to do, who it serves, why it matters, and how progress would be recognized.
3. Participant & Stakeholder Support Needs	Programs work better when they are designed around real people, not imaginary ideal users. This domain identifies what participants, staff, faculty, clients, partners, or community members need in order to participate meaningfully.	What do people already understand? Where do they get stuck? What support formats do they prefer? What concerns or barriers do they have? Who is interested but not participating? Whose needs are least visible?	Needs assessment surveys; focus groups; interviews; consultation notes; workshop evaluations; help requests; participation patterns; stakeholder feedback; service inquiries.	Support is designed around real conditions, including workload, confidence, access, time, language, technology, and trust.
4. Resource Discovery & Curation	Many programs have too many scattered resources and not enough usable pathways. This domain looks at how people find, evaluate, adapt, and trust the resources they need. In OER programs, this includes finding and evaluating open educational resources. In other settings, it may include guides, templates, training materials, documentation, client resources, or public-facing tools.	Where do people currently look for resources? Are resources organized around user needs? Can people tell which resources are current, relevant, and trustworthy? Are there curated pathways instead of giant link lists? Are resources easy to adapt or reuse?	Resource inventory; website analytics; content audit; repository review; OER tracker; landscape briefs; user feedback; documentation review; search logs; common resource requests.	People are not left alone with a pile of links. They have curated, contextualized resources that help them make decisions and take action.

Domain	What this means	Guiding questions	Evidence to collect	What stronger readiness looks like
5. Implementation Pathways	Interest is not implementation. Programs need structures that help people move from curiosity to action, and from action to sustained practice.	What happens after someone expresses interest? Is there a clear pathway from learning to doing? Are there different levels of engagement? Are people supported before, during, and after implementation? Are follow-up structures in place?	Program workflows; onboarding sequences; grant pathways; badge/certificate structures; workshop series; planning templates; implementation plans; progress trackers; follow-up emails.	The program has clear bridges between interest, learning, planning, action, reflection, and continued participation.
6. Funding, Labor & Sustainability	Values-driven work still requires time, money, staffing, tools, recognition, and maintenance. This domain makes labor visible so the program does not depend on burnout or heroic over-functioning.	What funding supports the program? Who does the labor? Is that labor recognized or compensated? What work is invisible? What would be needed to sustain or scale responsibly? What happens if a key person leaves?	Budget records; staffing maps; workload estimates; grant history; incentive records; maintenance task lists; role descriptions; sustainability plans; time-to-completion estimates.	The program can name the labor required, support it responsibly, and plan beyond one person's memory, energy, or unpaid extra work.
7. Evidence & Evaluation	Programs need evidence that helps them understand reach, impact, barriers, learning, and change. Strong evaluation connects evidence to purpose instead of collecting random data at the end.	What data is currently collected? Does the evidence align with the program's goals? Are both numbers and stories included? What claims can be responsibly made? What do we still need to learn?	Participation data; outcomes data; cost savings; adoption records; student/client/community feedback; case studies; interviews; reflections; annual reports; dashboards; evaluation questions.	The program can tell a credible story using both quantitative and qualitative evidence, without overclaiming or flattening complexity.
8. Equity, Ethics & Care	Equity and care should show up in the design, not just the values statement. This domain looks at privacy, accessibility, consent, inclusion, workload, communication, and human capacity.	Who benefits from the program? Who may still be left out? Are materials accessible? Are expectations humane? Is data collected ethically? Are stories shared with consent? Does the program reduce barriers or create new ones?	Accessibility reviews; consent language; privacy practices; participation patterns when appropriate; communication samples; workload feedback; user experience feedback; equity-focused reflections.	Care is built into the structure through clear expectations, accessible materials, ethical practices, humane timelines, and attention to who can actually participate.
9. Documentation & Knowledge Transfer	If the work only lives in one person's head, inbox, or unofficial folder system, the program is fragile. Documentation helps the work become reusable, explainable, and sustainable.	Where does the work live? Can another person understand how the program operates? Are decisions documented? Are templates and workflows easy to find? What knowledge would be lost if someone left?	Shared folders; knowledge bases; SOPs; templates; decision logs; meeting notes; reports; calendars; program maps; landscape briefs; communication archives.	The program has institutional memory. People can understand, maintain, adapt, and continue the work without starting from scratch.
10. Change Readiness	Programs operate in changing conditions. AI, policy shifts, funding changes, technology updates, political pressure, leadership turnover, and community needs can all affect the work. This domain asks whether the program can notice and respond to change with clarity.	What changes are affecting the program right now? How are decisions updated? Who interprets new risks or opportunities? Is there a process for revising guidance, tools, and strategy? How does the program avoid scrambling every time conditions shift?	Environmental scans; policy updates; AI or technology guidance; funding trend notes; stakeholder concerns; risk assessments; updated training materials; decision memos; strategy notes.	The program has a way to notice change, interpret it, and respond with strategy instead of panic.

Using the Framework in OER and Beyond

In an OER or affordable learning program, the framework might be used to examine faculty support needs, OER discovery pathways, licensing knowledge, student affordability evidence, course marking processes, publishing support, and program sustainability.

In a nonprofit, small business, or mission-driven team, the same framework might be used to review a public resource hub, onboarding system, training program, documentation project, client education pathway, community support initiative, or grant-funded program. The context changes. The underlying questions stay useful: Can people enter the work? Can they use it? Can the team sustain it? Can the program learn from evidence and change over time?

Plain-Language Summary

This framework helps mission-driven programs move from scattered support to sustainable practice. It asks whether people can find the program, understand the invitation, get the support they need, use the resources available, participate without unnecessary confusion, and help the work continue beyond one person's capacity.

Because "we have a guide somewhere" is not a program strategy.

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AI Use & Development Note

This resource was developed through an AI-supported drafting, organization, and revision process. AI-supported tools, including ChatGPT and Notion AI, were used to help organize notes, synthesize themes, structure the document, draft language, revise sections, and prepare public-facing versions of the material.

The framework, interpretation, examples, source selection, revisions, and final editorial decisions are my own. This resource reflects my professional experience in open education, OER program development, faculty support, learning design, documentation, program infrastructure, and care-centered educational practice.

When this resource draws on external research, reports, or field-based sources, those sources are cited directly.

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