GUIDE TO USING THE OPEN EDUCATION RESOURCES (OER) RUBRICS AND EDUCATORS EVALUATING THE QUALITY OF INSTRUCTION PRODUCTS (EQuIP) RUBRICS
Guide to Using the Open Educational Resources (OER) Rubrics and the Educators Evaluating the Quality of Instructional Products (EQuIP) Rubrics

Achieve has collaborated with educators, state leaders and other partner organizations to produce two sets of criteria and review processes for examining the quality and alignment of instructional materials. This guide has been developed to help educators who are interested in determining the quality of instructional materials — starting with the determination of which rubric(s) is most appropriate to use. The two rubrics are:

- OER rubrics: designed to help educators identify quality educational materials from among the vast number of objects housed in online open resource repositories; and
- EQuIP rubrics: designed specifically for the Common Core State Standards (CCSS) lessons and units in mathematics and English language arts (ELA)/literacy.

Both rubrics were developed with input and feedback from numerous educators and experts over a series of months. While both sets of rubrics measure many of the same instructional characteristics, they have distinct purposes and should be used independently or, in select cases, in combination with each other to address specific needs.
OER Rubrics: The Fundamental Structure

The OER rubrics represent a system for rating the quality of a range of educational objects, including images, applets (Example 1), activities, games (Example 2), lessons, units and assessments designed to provide informative feedback on materials regarding their degree of alignment to the standards selected.

Some specific examples of object types are provided here:

**Example 1:** Here is an example of an **applet** addressing area of trapezoids. It might be used for class demonstrations or by an individual student and is aligned to G.GPE.7:

![Trapezoid Area and Perimeter](www.oercommons.org/courses/trapezoid-area-and-perimeter-coordinate-geometry/view)

**Example 2:** This example shows a **game** to practice multiplication facts and is aligned to 4.OA.4 and 3.OA.7:

![Factor Blaster](www.oercommons.org/courses/games-to-practice-multiplication-facts/view)

OER are often digital instructional resources. The rubrics can be applied across content areas and object types. For the purposes of an OER quality review, any component that can exist as a stand-alone resource can qualify as an “object.” In general, the OER rubrics are meant to be applied to the smallest meaningful instructional unit.

The OER rubrics were designed for individual classroom teachers who often search and select a variety of types of online resources independently for use in the classroom; individual user ratings are collected for each applicable rubric for each object. However, a collegial process could also be employed, with a team of reviewers working in concert to review online resources.
The quality review system includes eight separate OER rubrics, one for each dimension of quality:¹

- **Rubric I.** Degree of Alignment to Standards
- **Rubric II.** Quality of Explanation of the Subject Matter
- **Rubric III.** Utility of Materials Designed To Support Teaching
- **Rubric IV.** Quality of Assessment
- **Rubric V.** Quality of Technological Interactivity
- **Rubric VI.** Quality of Instructional Tasks and Practice Exercises
- **Rubric VII.** Opportunities for Deeper Learning
- **Rubric VIII.** Assurance of Accessibility

¹ A brief description of each of the OER rubrics is included in Appendix A.
EQuIP Rubrics: The Fundamental Structure
The EQuIP rubrics are criterion-based tools —for mathematics and ELA/literacy — designed to provide productive and actionable feedback on CCSS-aligned lessons or units. The rubrics guide the user in analyzing lessons or units (Example 3), leading to a holistic summary judgment about their quality as well as offering criterion-referenced recommendations for improving resources identified as lacking in one or more areas. The EQuIP rubrics are intended to be used in the context of a collaborative review process in which educators work together to identify, develop and improve CCSS-aligned materials for instructional purposes. The quality review process is designed to elevate educator expertise and support efforts to build capacity.

Example 3: This example shows the introduction and alignment page for a full unit plan (an 88-page PDF), which targets 3.OA.1 to 3.OA.9 and MP.1 to MP.4:

www.oercommons.org/courses/cookie-dough/view

Each EQuIP rubric is organized around four interdependent dimensions for measuring quality:^2

- **Dimension I.** Alignment to the Depth of the CCSS
- **Dimension II.** Key Shifts in the CCSS
- **Dimension III.** Instructional Supports
- **Dimension IV.** Assessment

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^2 A brief description of each dimension of the EQuIP rubrics is included in Appendix B.
Comparison of the Two Quality Review Rubrics

The OER and EQuIP rubrics share some content and a similar goal of identifying high-quality resources. They both emphasize alignment to a set of standards, attention to both procedural and conceptual understanding, strong supports for teachers and students, and quality assessments. They differ, however, in several important ways:

- **Primary Purpose:**
  - The primary purpose of the OER quality review process is for individuals to determine the degree of alignment of an online resource to a particular set of standards and record that information for future users (ratings are collected in a database, which keeps and displays running averages as individuals enter their scores).
  - The primary purpose of EQuIP is for groups of educators to identify exemplary lessons or units for the field and to provide constructive feedback to authors/developers to guide revision and improve the lesson/unit. The EQuIP rubrics can guide front-end development, mid-process feedback, and back-end review.

- **Object Size:**
  - Since many online resources are compact objects, the OER rubrics are designed especially for the evaluation of single tasks, activities or short lessons. As such, the OER rubrics do not, as a rule, address sequence, progression or skill-building over time.
  - On the other hand, the EQuIP rubrics explicitly address these characteristics, which are expected in full lessons or units.

- **Process:**
  - The OER rubrics are designed to be applied by an individual user working alone.
  - Alternatively, a collegial EQuIP quality review process was created, with reviewers collaborating and reaching consensus with other trained educators.

- **Content Area:**
  - The OER rubrics do not specify subject matter; they are intended for use with any subject.
  - The EQuIP rubrics are designed specifically for evaluating materials either in mathematics or in ELA/literacy. As such, the criteria and rating descriptors are more content specific in the EQuIP rubrics.
Standards:
- When an object is evaluated using the OER rubrics, it can be measured against any set of academic standards.\(^3\)
- The EQuIP rubrics were developed so that the lesson or unit can be measured against the CCSS for mathematics or ELA/literacy.

Rating System:
- The OER rubrics are a set of eight independent rubrics, each with its own rating descriptors. Reviewers can choose to use one, some or all of the rubrics, depending on their needs. Any individual rubric that does not apply to an object can be rated as N/A, “not applicable.”
- EQuIP, on the other hand, has two rubrics — one for mathematics and one for ELA/literacy — each with four separately rated dimensions that, when combined, determine a single overall rating for a lesson or unit. All four dimensions of the EQuIP rubric are required for the evaluation to be valid and complete.

Rubric Rating Criteria:
- The OER rubrics provide specific and detailed descriptions of four different rating levels, 0 to 3, for each rubric and also provide a description for when a rating of N/A is suitable.
- The criteria for the EQuIP rubrics define only the qualities of an exemplary lesson or unit, or the highest rating possible against which raters judge the presence or absence of particular criteria.

Dimensions:
- Since many OER objects are technological in nature, it is important to rate the quality of their interactivity (see Rubric V).
- Technological interactivity is not addressed in the EQuIP rubrics; however, the rubrics do include criteria that examine the extent to which technology and media are embedded in the instructional materials to deepen student learning.

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\(^3\) At this time, only the CCSS for mathematics and ELA/literacy are linked to the online OER Evaluation Tool available at www.oercommons.org; however, any other set of standards could be applied in the OER review process.

\(^2\) OER Rubric VIII is not presently on the website tool and is intended for use only by trained evaluators to rate accessibility for students with disabilities.
The following **Decision Tree** can be used to determine which quality review system, or combination of systems, is most appropriate to use:

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**Educational Resource**

- **Full Lesson/Unit**
  - ELA or Math
    - CCSS: Use EQuIP
    - Non-CCSS: Use OER Rubrics
  - All Other Disciplines (e.g., art, business, science, etc.): Use EQuIP

- **Any Object Not a Full Lesson/Unit** (e.g., activity, single task, practice exercise, assessment, image, applet, etc.): Use OER Rubrics

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**CCSS**

- Does not include Technological Interactive Component: Use EQuIP
- Includes Technological Interactive Component: Use EQuIP + OER Rubric V

**Non-CCSS**

- CCSS Literacy Focus (Science, Social Studies or Technical Subjects): Use EQuIP
- CCSS Other Disciplines (e.g., art, business, science, etc.): Use OER Rubrics

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Some Specific Examples of How the Two Quality Review Systems Can Work Together

- **For Resource Developers:**
  - Educators uploading a CCSS-aligned lesson/unit to an OER repository should first use the EQuIP rubrics to evaluate the lesson/unit before uploading it. Once it is online, educators may use the OER rubrics to leave specific information for subsequent users.
  - Developers using the EQuIP rubrics to revise CCSS-aligned lessons/units, which include links to online materials, may also want to use OER Rubric V in the revision process to evaluate the quality of those interactive materials.
  - OER developers could use the criteria from one or more dimensions of the EQuIP rubrics to determine specific ways to create a high-quality resource or improve an existing one. For example, the criteria for Dimension III could be used to help determine specific ways to improve instructional supports in an online resource.

- **For Educators Seeking High-Quality Developed Resources:**
  - Educators using online repositories, such as OER Commons, to search for resources would find it convenient — a mere click away — to use the OER rubrics to assess the quality of those resources. If they discover a CCSS-aligned lesson/unit in a repository, however, a more in-depth analysis using the EQuIP rubrics would be more appropriate.
  - Educators using an EQuIP rubric to evaluate a CCSS-aligned lesson/unit may find a link to an interactive object (e.g., an activity, game, demonstration applet, etc.) embedded in the lesson/unit. In this case, they will want to use the applicable OER rubric(s), including Rubric V, to evaluate the linked resource.

Achieve established a process to select and train the EQuIP Peer Review Panel, a group of experienced reviewers to evaluate the quality and alignment of lessons and units to the CCSS using the EQuIP rubrics. On the EQuIP webpage, there are instructional materials that have been submitted to the EQuIP Peer Review Panel and evaluated as “Exemplars” or “Exemplars if Improved.” Each lesson or unit is available to download and use in classrooms.

Developers interested in submitting lessons or units to be evaluated by the EQuIP Peer Review Panel can do so by visiting lessons.achieve.org.
Appendix A

The OER Rubrics
The following provides a brief description of each of the eight OER rubrics.

**Rubric I: Degree of Alignment to Standards**
This rubric is applied to learning objects that have suggested alignments to standards. It is used to rate the degree to which an individual object actually aligns to each proposed standard. The rubric was designed specifically for the CCSS but can be used with any set of standards. Before the rubric can be applied, the assumption is that a user has proposed an alignment between the object and the selected standard(s).

**Rubric II: Quality of Explanation of the Subject Matter**
This rubric is applied to objects designed to explain subject matter. It is used to rate how thoroughly the subject matter is explained or otherwise revealed in the object. Teachers might use this object with a whole class, a small group or an individual student. Students might use the object to self-tutor. For objects that are primarily intended for teacher use, the rubric is applied to the explanation of the subject matter not to the planning instructions for the teacher.

**Rubric III: Utility of Materials Designed to Support Teaching**
This rubric is applied to objects designed to support teachers in planning or presenting subject matter. The primary user would be a teacher. This rubric evaluates the potential utility of an object at the intended grade level for the majority of instructors.

**Rubric IV: Quality of Assessment**
This rubric is applied to those objects designed to determine what a student knows before, during or after a topic is taught. When many assessment items are included in one object, as is often the case, the rubric is applied to the entire set.

**Rubric V: Quality of Technological Interactivity**
This rubric is applied to objects designed with a technology-based interactive component. It is used to rate the degree and quality of the interactivity of that component. “Interactivity” is used broadly to mean that the object responds to the user; in other words, it behaves differently based on what the user does. This is not a rating for technology in general, but for technological interactivity. The rubric does not apply to interaction between students, but rather to how the technology responds to the individual user.

**Rubric VI: Quality of Instructional Tasks and Practice Exercises**
This rubric is applied to objects that contain exercises designed to provide an opportunity to practice and strengthen specific skills and knowledge. The purpose of these exercises is to deepen understanding of subject matter and to routinize
foundational skills and procedures. Sets of practice exercises are treated as a single object, with the rubric applied to an entire group.

**Rubric VII: Opportunities for Deeper Learning**
This rubric is applied to objects designed to engage learners in at least one of the following deeper learning skills, which can be applied across all content areas:

- Think critically and solve complex problems.
- Work collaboratively.
- Communicate effectively.
- Learn how to learn.
- Reason abstractly.
- Construct viable arguments and critique the reasoning of others.
- Apply discrete knowledge and skills to real-world situations.
- Construct, use or analyze models.

**Rubric VIII: Assurance of Accessibility**
This rubric is used to ensure that materials are accessible to all students, including students identified as blind, visually impaired or print disabled, and those students who may qualify under the Chafee Amendment to the U.S. 1931 Act to Provide Books to the Adult Blind as Amended. It was developed to assess compliance with U.S. standards and requirements but could be adapted to accommodate differences in other sets of requirements internationally.

Accessibility is critically important for all learners and should be considered in the design of all online materials. Identification of certain characteristics will assist in determining if materials will be fully accessible for all students. Assurance that materials are compliant with the standards, recommendations and guidelines specified assists educators in the selection and use of accessible versions of materials that can be used with all students, including those with different kinds of challenges and assistive devices.
Appendix B

The EQuIP Rubrics
The following provides a brief description of each of the four dimensions of the EQuIP rubrics.

Dimension I: Alignment to the Depth of the CCSS
This dimension is used to evaluate the alignment between the content and performance required in the lesson/unit and that of the targeted CCSS in mathematics or ELA/literacy. The criteria address alignment to both the letter and the spirit of the CCSS. The ELA/literacy rubric includes criteria to be applied to longer lessons or full units.

Dimension II: Key Shifts in the CCSS
The criteria of this dimension address the shifts that are reflected in the CCSS and include Focus, Coherence and Rigor (mathematics) and Reading Text Closely, Text-Based Evidence, Writing from Sources and Academic Vocabulary (ELA/literacy) for all lengths of lessons. The ELA/literacy rubric also includes additional criteria in this dimension for longer lessons and full units.

Dimension III: Instructional Supports
This dimension is used to evaluate the effectiveness of the lesson/unit’s responsiveness to the needs of both the teacher and the student. Some criteria for both subject areas are: includes clear and sufficient guidance to support teaching and learning, is engaging for students of all learning needs, provides opportunity for productive struggle, and is easy to understand and use. Both the mathematics and ELA/literacy rubrics include additional criteria for those longer lessons and full units.

Dimension IV: Assessment
This dimension addresses whether the lesson/unit regularly assesses mastery of standards-based content and skills. Both the mathematics and ELA/literacy rubrics ask that assessments provide direct observable evidence of individual student understanding, that assessment items are unbiased and accessible to all students, and that scoring guides and/or answer keys are provided to guide interpretation of student performance. Both subject areas include a longer lesson/full unit criterion asking that varied modes of assessment are included.