

Being Earnest with Collections — Advancing Textbook Affordability: Considerations for Open and Affordable Course Materials



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Column Editor's Note: *This edition of **Being Earnest with Collections** explores Open Educational Resources and the challenges libraries face when trying to help address the high costs associated with textbooks. In the article, **Ariana Santiago** has provided **ATG** readers with an overview of the project she has lead at the **University of Houston**. She provides comparisons between OER and library funded resources, outlines the pros and cons, and provides practical advice for other libraries considering similar programs. OER has been explored here at **The University of Alabama** though we have not stepped in at the level seen in Houston. On a personal note, I have known **Ariana** for several years and remember when she made the decision to become a librarian. She has now moved from being in a staff level position at the **University of Central Florida** to her current role as an up and coming leader in our profession. I am happy to have this contribution to the **Being Earnest with Collections** column. I am sure others will find some key takeaways from this article. — **MA***

Textbook costs are widely recognized in higher education as a significant burden to students, preventing many from being able to access required course materials. A solution to this problem that is seeing growing success is to replace costly textbooks with open educational resources (OER) — learning materials made freely available via open licenses — so that all students benefit from having immediate access to resources that support their academic success. Along with OER, many replace traditional textbooks with other resources that are freely available to students, though are not openly-licensed, such as journals, eBooks, and other resources licensed through the library, and websites, videos, and other resources that are freely-available online. Should an institution's OER program focus on resources that are truly OER, or be inclusive of non-OER resources (which will be referred to here as “affordable course content”)?

Grant programs, often spearheaded by the academic library, have emerged as a leading strategy in encouraging adoption of OER or affordable course content in order to eliminate textbook costs. There is wide variety in the scope and structure of such grant programs, including whether they are intended only for OER adoption or are inclusive of non-OER affordable resources. For example, the **University of Arkansas** OER Course Materials Conversion Program offers faculty “extra compensation funding to encourage moving from high cost commercially published textbooks to open educational resources (OER)” at three different levels, distinguished by whether the faculty adopt, adapt, or create OER (University of Arkansas, 2019). **Miami University** also focuses its program on OER adoption, offering professional development funds to faculty who replace traditional required materials with OER and assess the impact on course outcomes and student learning (Miami University, n.d.). Others, like **Kansas State University's** Open/Alternative Textbook Initiative, provide funding for the adoption of “free alternatives to traditional print textbooks,” which can include any combination of open access textbooks, library resources, OER, multimedia resources found on the open web, or faculty-authored materials (Kansas State University, 2019). Similarly, the **University of Oklahoma's** Alternative Textbook Grant can be applied towards the adoption of OER or library resources, though they specify that grants for library resource use are “applied to the purchase of multiple concurrent licenses” rather than awarded to faculty directly (University of Oklahoma, 2019). Many more examples are available in the “OER &

Textbook Affordability Initiatives” document created by **Grand Valley State University Libraries** (Yahne, J., Rander, J., and Ruen, M., n.d.).

At the **University of Houston**, our Alternative Textbook Incentive Program (ATIP) takes a broad approach to resource type, awarding instructors for replacing required commercial textbooks with adoption, adaptation, or creation of OER, assembly of library-sponsored or freely available resources, or any combination thereof (University of Houston Libraries, n.d.). Launched in 2018, our incentive program is new and growing: in the first two ATIP cohorts, we have awarded thirty-nine alternative textbook projects which will result in an estimated student savings of over \$960,000 by the end of the 2019-20 academic year. As an institution that has recently implemented a grant program to advance textbook affordability, we have seen some benefits and drawbacks to both OER and affordable course content. Based on our experience with ATIP, I offer thoughts on how these resource types impact adoption and implementation, with considerations for why your institution might support OER, affordable course content, or both.

Flexibility in Implementation

A significant benefit of OER is the flexibility provided by open licenses, as they offer automatic permission to use the content in a variety of ways. The permissions allowed by open licenses are often referred to as the “5R activities” (Wiley, n.d.), which are the abilities to retain, reuse, revise, remix, and redistribute. These permissions allow faculty the flexibility to incorporate content into their course without the barrier of understanding how to comply with complex copyright terms. For example, the permission to redistribute allows OER to be shared with all students, whether by distributing printed copies, uploading document files in the learning management system, or sharing links to the resources — abilities which cannot be assumed with material protected under traditional “all rights reserved” copyright. The ability to reuse content ensures that it can be utilized for a variety of purposes — for example, assigned as course readings, incorporated into class activities or assignments, used for study purposes, and other innovative uses that may be restricted or constrained by vendor licenses for library content.

These permissions, along with the ability to retain the content, greatly benefit students by granting free and perpetual access to the material without violating copyright. This has immediately practical implications; for example, students have access to course materials on the first day of class, can download copies to their personal devices for use when they don't have reliable internet access, and can keep the material to refer back to after the course has concluded, all of which further students' potential for academic success. OER remove many barriers and concerns associated with traditional copyright while allowing faculty and students much greater freedom in how course content can be used.

Additionally, OER typically use **Creative Commons** licenses, for which the license deeds are relatively clear and easy to understand. In contrast, when embedding library resources in the curriculum, the wide array of license terms can make it unclear to faculty how to access and use the materials for their course. Although it takes some training to educate faculty on **Creative Commons** licenses, they ultimately remove many frustrations simply by being straightforward and consistent to all users.

Customizing Content

Focusing a grant program on OER rather than affordable course content can maximize the benefits of OER by making use of the abilities

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to revise and remix content. While affordable course content meets the goal of reducing textbook costs for students, it does not come with permission to adapt the content, meaning faculty will need to carefully curate and select resources that meet their course goals. This limitation is of particular concern when necessary content cannot be identified within existing licensed resources. Promoting OER opens up the possibilities to adapt existing content due to the built-in permissions to revise and remix. OER adaptations, whether they be minor edits or significant undertakings, allow faculty to truly customize course materials without having to write an entirely new textbook themselves. This can mean adding local context, ensuring cultural relevance, or including student perspectives within the resources. Additionally, faculty can create entirely customized course materials by creating their own OER, which many grant programs fund separately from adoption or adaptation.

At the **University of Houston**, we have seen significant interest in adapting OER to meet specific course needs. These projects take shape in a variety of ways, for example: adapting an OpenStax textbook by reorganizing and removing some chapters, but adding no new content; pulling together chapters from multiple open textbooks, and adding some new content, to create a customized open textbook; and modifying existing OER and adding exercises and assignments to create an open lab manual. All of these cases make use of open license permissions by building on existing works, which would not be possible in the traditional environment of library resources.

The extent to which OER can transform teaching and learning is evident in light of OER-enabled pedagogy, which **Wiley and Hilton** (2018) define as “the set of teaching and learning practices that are only possible or practical in the context of the 5R permissions which are characteristic of OER” (p. 135). OER-enabled pedagogy, often referred to as “open pedagogy,” typically involves students in the process of creating or revising OER. Students might write articles for Wikipedia, develop supplementary materials for an open textbook (such as study guides, test banks, tutorials, etc.), or contribute chapters to an open textbook. Often these activities contribute not only to students’ own learning, but to the learning experience of students who take the course in the future. Prioritizing OER efforts not only eliminates textbook costs for students, it allows for innovations and enhancements to the student learning experience that are just not possible with affordable course content.

Generating Buy-in

Although OER opens the door to flexible implementation of course materials and innovative adaptations of content, faculty buy-in is a common barrier to achieving those results. You might be starting at the ground level with raising awareness about OER before making progress on replacing commercial textbooks with OER. Specific concerns that may need to be addressed when educating the campus community include: understanding the difference between OER and free online resources; the OER production process, including how they are funded, authored, and reviewed; how to identify and evaluate OER; and lack of ancillary materials for OER, among others. The **SPARC** “OER Mythbusting” resource (SPARC, 2017) addresses top myths about OER in North American higher education, and is a useful tool in developing training opportunities.

In a risk-averse environment, OER may still feel too new or bleeding edge, where library resources are more familiar. Faculty are used to searching for traditional library materials and incorporating them into their course curricula. Thus, it is a natural step to apply this same process for replacing commercial textbooks with affordable content. Faculty who have no interest in pursuing using OER in their courses may be interested in switching to a library licensed DRM-free eBook instead of their standard textbook, or assembling electronic course packs from library journal articles.

If you aim to eliminate textbook costs for as many courses and students as possible, focusing on affordable course content is likely a quicker way to get there due to the existing knowledge and familiarity with these types of resources. The trade-off is that affordable course content comes with the expected limitations and frustrations of traditional copyright. Putting the focus on “affordable” does not

take advantage of the unique benefits of “open.” This has proven to be true at the **University of Houston**, where our Alternative Textbook Incentive Program sees more activity in adoption of affordable course content rather than adoption of OER. Those faculty who are engaged with OER tend to adapt or create, rather than simply adopt open resources. If you want to focus on OER rather than affordable course content, it is necessary to put time into educating faculty and other stakeholders.

Navigating Affordable Course Content

It’s true that replacing costly textbooks with library-licensed resources meets immediate needs for students without being “open,” however, this approach faces different challenges in implementation. At the **University of Houston**, we are beginning to identify unique challenges as a result of increased use of library materials to replace textbooks.

As mentioned previously, it may be unclear to faculty if and how their students can access desired resources: for example, how many users can access an e-book simultaneously? What can they do within the bounds of copyright? Etc. It requires working with library staff to find out, which is an added layer of communication and takes more time for the faculty to achieve their goal. For those without knowledge of the variety of vendors and license terms, this can be a complicated barrier to integrating course materials, compared to **Creative Commons** licenses which are clearly labelled for all users.

The **University of Houston** uses the electronic course reserves system, Ares, to host copyrighted course materials in the learning management system, Blackboard. The growth of our Alternative Textbook Incentive Program and subsequent promotion of course reserves as a necessary tool have highlighted the fact that many faculty are entirely unaware of course reserves. Not only does awareness of course reserves need to be raised, but faculty compiling library materials as the primary textbook will need to get accustomed to including course reserves in their course development process.

Of additional concern is the unclear definition of “OER” within our program, which strives to prioritize OER but currently sees significant use of affordable course content. This is reflected in informal communications with faculty, some of whom refer to both OER and library materials as “OER” when either resource type is used to replace a commercial textbook. Our primary goal of reducing textbook costs, coupled with high value of the open ethos and promotion of OER, seems to have led to a conflation of these ideas and inconsistent understandings of what the “open” in OER means. If your program supports both OER and affordable course content, it is important to clearly define and communicate those terms.

OER, or Affordable Course Content?

When considering OER and affordable course content, there is no one “best option.” Both are valuable resources that can eliminate textbook costs for students. Whether you want to focus support around one or the other depends on you institutional context and goals.

If your institution is heavily invested in advancing the open ecosystem, you can make a strong statement in support of open education by developing a program specifically intended to encourage the adoption, adaptation, and creation of OER. A focus on OER advances not only the cost savings benefit for students, but the mission of the open education movement: to provide free and perpetual access to quality learning materials for all. Rewarding faculty for using OER in place of a commercial textbook signals the institution’s support and contributions towards the open education movement, particularly when faculty create OER and share those back to the broader community for re-use and adaptation.

If reducing textbook costs is the primary goal, whether or not it is achieved with open resources, then supporting affordable course content might take precedence over OER. Starting with the familiarity of using library resources allows more people to get on board, especially considering faculty who aren’t yet comfortable with the idea of OER. Many programs take a hybrid approach, utilizing the advantages of both OER and affordable course content. This can increase awareness of OER while still working to lower textbook costs for students, and importantly, a hybrid approach presents even more options for individual faculty members to choose from when seeking to make course materials more affordable for students.

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