

It's Up to the Librarians

Establishing A Statewide OER Initiative

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Academic librarians increasingly adopt roles as campus leaders to promote the adoption of Open Educational Resources (OER) and other strategies to encourage making textbook affordability for students an institutional priority. When it comes to a statewide strategy to support academic library efforts for textbook affordability, Pennsylvania is lagging more progressive states such as Oregon, Georgia, Ohio, Virginia and Louisiana. This article makes a case for and lays out a strategy by which Pennsylvania's academic librarians can develop a statewide initiative to tackle the challenge of textbook affordability together in order to achieve substantial progress.

Funding for public education in Pennsylvania lags behind most states. According to the State Higher Education Executive Officers Association (2017, p.54), this state is ranked 49th in higher education spending per capita. As a result, colleges and universities, struggle to maintain high quality education and services without increasing tuition and fees. Now we must catch up with other states to fund and support textbook affordability. Open Educational Resources (OER) are open textbooks, courseware, and other educational materials that carry an open license permitting their free use and repurposing by others (Allen, Bell, & Billings, 2016). They offer Pennsylvania's students a viable option for a more affordable higher education experience, and an increasing number of academic librarians are taking a campus leadership role in establishing textbook affordability programs at their institutions. At our institutions, Penn State University and Temple University, librarians have initiated calls for textbook affordability and played instrumental roles in establishing institutional task forces to address and advance this important cause.

The authors contend that while progress at individual institutions within the state is encouraging, it is to the detriment of our collective student body that Pennsylvania lacks a cohesive, well-coordinated statewide initiative to

support textbook affordability projects. Responding collectively will enable all Pennsylvania academic institutions, whatever their size or resources, to tap into this movement. Individually, only some Pennsylvania institutions now have the capacity to sustain an initiative. Together, however, a much clearer rationale emerges for a statewide support network, ideally, in time, with state budgetary support. In this paper the authors discuss how Pennsylvania can learn from the experience of those states with well-organized initiatives, and share ideas for and examples of projects our academic libraries, working collaboratively, could accomplish.

Characteristics of Textbook Affordability Projects (TAP)

As academic librarians deepen their involvement with the OER community they learn that authentic OER is not only freely accessible, but also extends to its users a set of permissions for reuse, re-mixing, re-distribution and other rights. A YouTube video may be free to access, but unlike true OER it may offer no such permissions to those who might wish to reuse or modify the content. This also extends to licensed library content, such as a Films on Demand video, that while free to members of the academic community for which it is licensed, is strictly regulated by traditional copyright. Ideally, academic librarians would exclusively promote the adoption of OER, but owing to a lack of disciplinary coverage it is not always possible.

The direction academic librarians often take is to establish a textbook affordability initiative or extend their program to encompass affordable course content writ large. These programs organize and leverage institutional resources to offer financial-based incentives, non-financial support, or some combination, to enable instructors to more readily eliminate a commercially published textbook or course content in favor of OER or some combination of OER and other learning content that is available at no cost to learners. For example, both the Open and Affordable Course Content program at Penn State University and the [Textbook Affordability Project](http://guides.temple.edu/textbookaffordability) (TAP) (guides.temple.edu/textbookaffordability) at Temple University recognize that there is a spectrum of options that contribute to student learning while providing financial relief. While there has been rapid growth of open textbooks in the last two years, the availability of OER is as yet insufficient to meet all demand from disciplinary faculty.

Most TAPs seek to incentivize, financially or otherwise, faculty to participate. Adopting OER in order to eliminate a commercial textbook is time consuming, and time is a faculty member's most valuable commodity. In the absence of promotion and tenure credit or course buyouts, an incentive encourages faculty to accept the additional workload. In resource constrained institutions, community colleges for example, the administration may mandate faculty to use a particular open book in lieu of an award approach. While the ideal condition is one in which all faculty voluntarily adopt OER for the good of their students, the realities of the textbook publishing industry are such that it is still extremely convenient for faculty to point their students to a commercial textbook. Even knowing a textbook can present financial struggles for students, faculty find it difficult to sacrifice the slide decks, homework problems and test banks, that are supplemental to the textbooks.

TAPs Can Make a Difference

Temple University was an early adopter of a textbook project to incentivize faculty to stop using their commercial textbook and, when appropriate, use licensed library resources as supplemental learning content. When the program was planned in 2010, there was little conversation around textbook affordability in libraries. There were no models to follow. An initial investment of \$10,000 created ten \$1,000 stipends for the Alternate-Textbook Project. Faculty may use the funds as they wish, for technology, student assistants, or simply as a stipend for time invested to create their alternate textbook. Other than a commitment to eliminate the commercial textbook, there were few

requirements beyond an annual evaluation report. While the library had no official partners, support came from the institutional Teaching with Technology Roundtable, which aided with the promotion and review of the applications.

Fast forward to 2017 and the newly renamed Textbook Affordability Project, now offers 20 \$500 awards. Including anticipated savings to students for 2017-18, the estimated total over the years for 65 projects is over \$700,000. Savings multiply when faculty repeatedly use their alternate or open textbook or spread it to multiple sections of the same course. As more open textbooks become available the adoption strategies are shifting. Instead of waiting for faculty to respond to calls for proposals, librarians are proactively targeting faculty who teach courses where an open textbook exists and then encouraging them to adopt.

Existing Statewide and Consortial Projects

Given their proven success, why not have a TAP at every Pennsylvania college and university? That is what statewide OER projects are attempting to accomplish. When there is a training and support mechanism, many academic librarians working together can facilitate the launch of campus-specific TAPs. When one of the authors attended the 2016 Open Textbook Network Summer Institute, he heard representatives from two state consortia describe their progress towards a coordinated, statewide effort to promote textbook affordability and OER at many campuses. These consortia demonstrated that Pennsylvania librarians now had a model to follow for a statewide textbook affordability program.

The good news is that while Pennsylvania lags behind other states, these statewide initiative models allow us to learn from the lessons of our early adopter colleagues. We believe an early step in establishing a statewide OER initiative is a review of existing programs to determine the optimal first-year goals and strategies. For example, since most academic libraries partner with a library consortia we believe that the [Pennsylvania Academic Library Consortium](#) (PALCI) ([palci.org](#)) should participate, in a coordinating role, to support an initiative. Here are just a few state examples that could serve as models:

[Virtual Library of Virginia \(VIVA\)](#) ([vivalib.org/openinitiatives/otn.html](#)) - In the spring of 2016, the VIVA Steering Committee approved a membership in the [Open Textbook Network](#) (OTN) ([research.cehd.umn.edu/otn](#)) in an ongoing effort to strategically support open education and open access initiatives as a state. According to the VIVA website there are 35 academic libraries participating in the textbook affordability initiative. Like other state initiatives, it is propelled by becoming a member of OTN. A small group of trainers teach other librarians about OER and how to conduct on-campus workshops for faculty. VIVA's initiative is headed by a small steering group of librarians from four member institutions.

[Louisiana Library Network \(LOUIS\)](#) ([louislibraries.org](#)): At the 2017 PALCI annual meeting, Sarah Cohen of the Open Textbook Network, referred to LOUIS as "the poster child for a successful consortial approach to statewide textbook affordability." LOUIS members have embraced OER and quickly implemented and expanded their state effort for affordability. In addition to promoting open textbook adoption, like VIVA, it subsidizes faculty to review open textbooks. LOUIS also supports other approaches to affordability, such as collaborative e-book collections that can serve as substitutes for commercial textbooks.

[OHIOLINK](#) ([ohiolink.edu](#)): With its considerable resources, OHIOLINK is quickly emerging as a great OER resource for its member institutions. One of the first steps that OHIOLINK took to develop an open and affordable course content program was to join the Open Textbook Network as a consortial member. Among their other activities worth examining and modeling is an annual OER Summit at which librarians and faculty gather to learn about OER and adoption strategies. OHIOLINK also partners with Ohio State University Libraries to support faculty to adopt OER as part of the Ohio Affordable Learning Network.

These examples, and others such as [Affordable Learning Georgia](http://affordablelearninggeorgia.org) (affordablelearninggeorgia.org) or [Open Oregon](http://openoregon.org) (openoregon.org), all serve to demonstrate the substantial progress academic institutions can make when their librarians work together to advance textbook affordability in an organized, coordinated project. Pennsylvania higher education institutions can learn the lessons of these other statewide initiatives and borrow from their models to build a best of breed textbook affordability initiative in this state.

Goals for a Statewide Initiative

While our own institutions are actively engaged with textbook affordability initiatives, we believe our work is enhanced when textbook affordability for college students becomes a priority for academic institutions statewide. In addition to bringing more attention to the issue of affordable learning material, an overarching goal is legislative support for OER. While there are potential funding sources beyond state legislatures, such as charitable foundations, we believe that state support for affordable learning sends to educators at all levels the important message that OER adoption is a priority for our Pennsylvania education system. To be sure, states such as Georgia and Louisiana benefit greatly from state funding for their programs, but having government support affords them a stature that resonates with educators.

Here are several specific projects and outcomes we believe are possible with more statewide collaboration:

- *Train-the-Trainers:* Faculty resistance to OER adoption results from lack of awareness about OER or inability to identify OER for their course. As demonstrated by other consortia, training librarians from institutions across the state to become skilled at delivering OER workshops at their home institutions is a cost-effective way to create faculty awareness about OER, how to find it and how to adopt it. Training can be enhanced by enlisting faculty to convince their colleagues to adopt OER resources.
- *Offer OER Advocacy Training:* It takes more than knowing what OER is or how to find it to make a librarian an effective OER advocate on their campus. It takes specialized training to engage in productive conversations with faculty on the topic of textbook affordability, to respond to their questions and concerns about OER (e.g., lacks quality, too hard to find, etc.) and to make the case for institutional support for an OER initiative. Statewide training would equip librarians to advocate effectively for OER and textbook affordability options. Textbook and course material affordability are also advocacy issues of interest to students and provide good opportunities for librarians and students to partner.
- *Conduct Statewide OER Assessment:* Having data about student book buying (or avoidance) behavior can help make the case with funders or legislators. Student success data can be mined as well. With a wider pool of institutions not only potentially providing data related to student performance in courses where first-day access to course materials is provided, but a wider pool of expertise to assess that data, assessment can be greatly enhanced. While there are existing sources of national data on student and faculty behavior related to textbook use and purchasing, it is more powerful to have state-specific data.
- *Obtain Program Funding:* While these statewide projects would no doubt benefit from member institutions volunteering staff time, the experience of other states demonstrates the power of receiving external funding. It can support librarian and faculty travel to other campuses, fund the creation of original OER, and more.
- *Provide Seed Money:* Financial incentives and awards compensate faculty fairly for the time and effort required to replace a traditional textbook. Some academic institutions are unable to consistently afford such awards. If funds were readily available, in the form of seed grants, to those libraries in need, they would be more likely to make their projects sustainable over time.

- *Gather Project Data:* Sustainable textbook affordability initiatives depend on an efficient way to collect data recording the courses where textbooks were replaced, the material that replaced them, the number of students, total costs saved and faculty information. A statewide effort could add to a national databank and provide evidence of success to potential funders.
- *Support Local Consulting:* Starting an institutional textbook affordability initiative can overwhelm an academic library, particularly those with a smaller staff and resource base. This statewide initiative could provide access to expertise from librarians, in the form of a consulting service, who have already established a project.
- *Develop OER Infrastructure:* A statewide program for open and affordable course content creates the opportunity to leverage consortial solutions to the technological infrastructure needed to support OER development and hosting at scale. Rather than having each institution develop and maintain an OER repository or authoring tools, a consortial approach allows each member to take advantage of infrastructure investments and maintenance at scale.

While these are ambitious project goals, Pennsylvania's academic librarians possess the drive and initiative to accomplish them. State funding would make a difference, as it has in other states, but given Pennsylvania's precarious budget situation it will take advocacy efforts to obtain results. What are the prospects for legislative support for textbook affordability in Pennsylvania? One of the authors is a participant in a state-level committee discussing textbook affordability issues and can share the prospects for support within the Department of Education.

A Start: Legislative Efforts to Date

One of the long-term goals of a statewide program would be to gain legislative support and potential funding for open and affordable course content programs. This goal aligns with the work of the College Textbook Policies Advisory Committee, a group advising the Pennsylvania Board of Education on textbook and course material affordability since its first report was filed in 2012. The committee composition is representatives from the State Library of Pennsylvania, higher education (including one of the authors), the textbook publishing industry, college bookstores, and the legislature. The Committee's report recommended several options to reduce costs to students while including textbook rental programs, longer periods of use for assigned textbooks (fewer new editions), and requiring the least costly option for students (Commonwealth of Pennsylvania, 2012). The 2015 report of the committee presented progress toward those recommendations and showed noticeable savings to students through rental programs (Commonwealth of Pennsylvania, 2015).

Both reports and the early work of the committee focus on ways to reduce costs while maintaining the reliance on the for-fee textbook or similarly licensed content. The committee is expected to update its work for 2018 and with OER's progress as a viable cost reduction option, it is anticipated to play a larger role. The emergence of a statewide open and affordable program should be leveraged by this committee as a way to further reduce costs for students. Even modest investments by the legislature will show a significant return.

We Need to Act

A textbook affordability initiative at every academic institution in Pennsylvania is a worthwhile goal. It is likely that future declines in public funding for higher education in this state will lead to tuition and fee increases. American higher education's problems, from enrollment decline to disruptive competition, suggest that the state of our institutions grows ever more precarious. One form of stability that academic libraries could lead, champion, and

bring to our institutions is a proven path to saving students money - the textbook affordability initiative. We can articulate why this needs to happen and we have the experience to make it happen.

Now is the time because if we fail to use our power for collective action and change, it will open the door to further intrusions by commercial textbook publishers. Librarians should collectively be concerned that publishers will seek to influence state legislators in order to convince them that the path to affordable learning materials are new types of packaged digital content, such as “all-inclusive access” programs, that are rife with costs and complications for students (Jhangiani, 2017). We should not cede control of digital learning content to publishers when faculty and librarians, working together, can offer superior, affordable options.

The authors are currently engaged with like-minded colleagues who see new opportunities for a statewide textbook affordability project. They are working to identify the projects and plan a strategy for how to best bring them to fruition. We call on our fellow academic librarians, at institutions of all types, in every corner of the state, to join us on this journey to free our students from the burden of expensive learning content.

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