

SIF Initiative Sustainability Worksheet

Proposed Initiative Name	Open Education Resources (OER) Development Grant Program
Primary Strategic Priority Alignment	Student Success, Sustainability
Service/Academic Unit Name	Open Learning University Library CELT
Anticipated Start Date	April 1, 2018
Institutional Contact	Brenda Mathenia, Naomi Cloutier

Executive Summary

Open educational resources are "teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and repurposing by others. OER include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge."

(<https://www.hewlett.org/strategy/open-educational-resources/> accessed January 7, 2018)

This proposal seeks funding to establish an Open Education Resources Development Grant program at TRU. This grant program will provide much needed support, in the form of course release or financial incentive, to faculty who wish to develop OER for integration into their courses at TRU.

The development of OER and their integration into courses across campus are critical to the long-term success of TRU, as open educational resources are part of an important movement in the post-secondary sector. More significantly, OER are becoming critical to the overall success of TRU students who face financial challenges in affording traditional, publisher based textbooks, and other required course material. According to Educause, "over 66 per cent of students reported not purchasing a required textbook due to the high cost, with 38 per cent receiving a poor grade and 20 per cent failing a course without the required text."

(<https://er.educause.edu/articles/2017/8/oer-the-future-of-education-is-open>, accessed January 5, 2018) By providing affordable, i.e., free, access to the required course material via OERs students will be encouraged to enroll in courses they otherwise would not enroll in; will do better in those courses; and will realize the value TRU places on their success which will further their ability to persist and complete their educational goals.

This Strategic Initiative Fund 2018-2019 request will make possible the direct institutional support faculty need to adopt, adapt and integrate open educational resources as primary

materials within their courses at TRU. This SIF will also confirm for students the genuine concern and commitment that Thompson Rivers University has for their academic and personal success.

Description of Initiative

Initiative

The goal of this SIF request is to establish an OER Development Grant program at TRU. This grant program would provide funding and support to TRUFA and TRUOLFA faculty members who wish to integrate open educational resources into their TRU courses. The purpose of this initiative is:

1. To support faculty to integrate OER into their courses
2. To build capacity for creating and adapting open textbooks and other OER that are up to date and appropriate for TRU curricula
3. To demonstrate TRU's responsiveness to student needs as outlined in TRUSU's "Open Textbook Grants Program" proposal (See **Appendix A** or <http://trusu.ca/wp-content/uploads/2016/08/1A-SC-I-OT-M-SP-Proposal.pdf>)

OER are "teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and repurposing by others. OER include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge." (<https://er.educause.edu/articles/2017/8/oer-the-future-of-education-is-open>, accessed January 5, 2017)

One of the known barriers to faculty adoption of OER is the time required to redesign their courses in order to use OER successfully. According to a 2016 BCCampus report by Jhangiani, Pitt, Hendricks, Key, and Lalonde, 32% of respondents indicated that "provision of more institutional resources or incentives (e.g., time, funding, recognition, expertise) would encourage adoption of OER" (p.23). The report recommends that "Institutions and departments should provide release time or paid educational leave to faculty to create, adapt, and/or adopt OER" (p. 33).

(https://bccampus.ca/files/2016/01/BCFacultyUseOfOER_final.docx#_Toc440543758, accessed January 5, 2018)

Successful applicants to the grant may receive up to \$7,000. The grant would consist of up to \$6,500 as course release or financial incentive to help faculty redesign a TRU course to use OER as their primary course material, and to help them adopt and/or adapt open textbooks and other OER for that purpose. An additional \$500 may be available to support travel costs related to dissemination of results of their efforts. This SIF is intended as a pilot and anticipates funding up to five (5) grants in the initial year of the program.

Background

This initiative builds upon TRU's commitment to open educational resources and practices. A brief inventory of Open Learning and TRU campus courses that already integrate OER reveals that of 18 OL courses that *do not require textbook purchases*, eight (8) specifically use open textbooks. At least eight campus courses currently utilize open textbooks, and several campus faculty are currently reviewing open textbooks to determine the feasibility of revising them for adoption in their courses.

TRU is an active participant in the Zed Cred and OERu initiatives. The Zed Credential initiative is a project awarded by BCCampus to three post-secondary institutions – TRU, the Justice Institute of BC (JIBC), and Kwantlen Polytechnic University (KPU) – whereby students may complete a credential without incurring textbook costs (for more information see <https://bccampus.ca/2017/07/13/bccampus-is-pleased-to-announce-the-2017-open-education-grant-recipients/>). Plans are well underway for TRU to offer a slate of at least ten (10) courses without associated textbook costs for the Certificate in General Studies by Fall 2019. TRU-OL is also a founding anchor partner of the OERu partnership between institutions around the world that share an interest in reducing barriers to higher education. (For more information, see <https://oeru.org/>) TRU is contributing two (2) courses to the portfolio of courses offered through the OERu, and students who complete these courses could receive TRU credit.

TRU has been one of the primary institutions involved in promoting the adoption of open educational resources within the province. We are no longer within the top five (5) adopting institutions in BC according to BCCampus (See Appendix B or <https://open.bccampus.ca/open-textbook-stats/>, accessed January 5, 2018). Our early lead has diminished as other institutions such as Kwantlen Polytechnic University (KPU), Langara College, Douglas College, University of British Columbia, and Camosun College have moved ahead of us in adopting OER for their campuses. Kwantlen Polytechnic University (KPU), Simon Fraser University (SFU), BC Institute of Technology (BCIT) and University of Northern British Columbia (UNBC) have all implemented direct support for OER integration via grant programs. An OER Development Grant program at TRU is a means of demonstrating the institution's commitment to open educational resource and to providing faculty with meaningful support to integrate OER into their teaching. It is hoped that this grant program will help reestablish TRU's place as a leader in open education.

Institutional Alignment

TRU is uniquely positioned to pursue excellence and leadership in open education scholarship and pedagogy due to its related mandate and existing expertise and capacity. The OER Development Grant aligns with TRU's mission and mandate at the highest levels:

- *The Thompson Rivers University Act*: explicitly states that the purpose of TRU includes the promotion of “teaching excellence and the use of open learning methods.” (Purposes (2) Thompson Rivers University Act, www.bclaws.ca/civix/document/id/complete/statreg/05017_01 accessed January 5, 2018)

- *The TRU Academic Plan*: states that TRU will “support the use of open educational resources” (p. 14) and students will “engage in flexible learning options” (p. 12)
- *TRU’s Strategic Priorities*: states that TRU will “promote access to [open educational resources and learning](#), offering flexible credentials and residency models when possible.” (*Implementing our Mandate and Mission: Access to Excellence, Strategic Priorities 2014-2019*, p.3)

By actively promoting open educational resources and supporting the efforts of faculty to integrate OER into their teaching, this initiative supports all TRU strategic priorities, but most directly relates to the priorities of *Increasing Student Success* and *Increasing Sustainability*.

Increasing Student Success:

The OER Development Grant Program will encourage and support the active development of open educational resources and their integration into teaching practices at TRU. The implementation of OER at TRU **will lower the financial barriers to students** that traditional course materials and textbooks create. OER is one factor in making education more accessible to students by lowering their direct costs, thus strategically advances TRU’s efforts related to recruitment, retention and completion. Open educational resources directly support student success by negating the impact of high textbook costs on student’s ability to access the resources they need to succeed in their course work at TRU, thus directly increasing student success.

“According to a study published by the General Accountability Office in 2013, textbook costs rose 82 percent between 2002 and 2012 — despite the fact that the overall rate of inflation, represented by the Consumer Price Index, rose only approximately 28 percent during the same time period.² The rapid increase in textbook costs has resulted in students increasingly pirating course content, selecting classes and majors based on textbook costs, and sharing their textbooks with friends and classmates.³

Over 22,000 students attending Florida public colleges and universities were surveyed on how the cost of textbooks is impacting access to required materials and achievement. Over 66 per cent of students reported not purchasing a required textbook due to the high cost, with 38 per cent receiving a poor grade and 20 per cent failing a course without the required text. Even when students purchase the text, they may not use the text to its full extent, choosing not to take notes or highlight in the book so that they can recoup a percentage of their money by selling it back to the bookstore.” (See Appendix C or <https://er.educause.edu/articles/2017/8/oer-the-future-of-education-is-open>, accessed January 5, 2018)

The numbers in BC are similar. According to research by Jhangiani and Jhangiani (2017), “When asked about how the cost of textbooks had influenced their course enrolment and persistence, 27% of respondents indicated that they had taken fewer courses, 26% had not registered for a course, and 17% reported dropping or withdrawing from a course,” while “thirty percent of respondents reported earning a poorer grade in a course because of textbook costs.”

(<http://www.irrodl.org/index.php/irrodl/article/view/3012/4214>, section on Impact of Textbook Costs on Course Outcomes, accessed January 5, 2017.) The evidence exists that OER can provide savings for students engaged in post-secondary learning. As of May 2016, BC Campus reports overall student savings in BC has been between \$1.4 – \$1.8 million with 142 faculty involved and a total of 491 known adoptions of OER in place. (<https://open.bccampus.ca/2015/09/10/more-bc-open-textbook-stats/>, accessed January 7, 2018)

Increasing Sustainability

Sustainability at TRU can be viewed through multiple lenses, including environmental, economic, social, cultural, and creative. This proposal actively contributes to all of these aspects of sustainability.

- *Environmental*: It reduces TRU’s carbon footprint since OERs are born digital, thus they do not require the resources required in traditional textbook publishing.
- *Economic*: OERs make education more affordable to student as the cost of textbooks can make access to education prohibitive. Reducing this barrier to access also furthers TRU’s economic sustainability and long-term success because more students may choose to register at TRU over other schools that may not encourage this option.
- *Social and cultural*: TRU’s active engagement and support for OER demonstrates its commitment to social justice and to being a leader in a dynamic and powerful movement in the post-secondary sector.
- *Creative*: Faculty engagement in the adoption, adaptation, and creation of OER is a way to promote creative sustainability by encouraging faculty to engage with their course content in new ways by shaping the learning materials that they use.

This initiative is collaboratively and purposefully sponsored by three pan-institutional divisions to ensure that OER opportunities are available to all TRU faculty regardless of faculty, school or division thus reducing the traditional academic silos that can limit innovation.

Centre for Excellence in Learning and Teaching (CELT):

The Centre for Excellence in Learning and Teaching aims to be responsive to all levels of learners, programs, delivery modes and faculty. The Centre has been engaged in conversations with the informal OER working group as well as Open Learning and the Library to ensure that we are responsive to the needs of faculty and students. Our CELTtalk series has also highlighted the role of OERs in curriculum development.

In the 2017-18 Service Plan, CELT has committed to instructional and curriculum development across schools and faculties, as well as leadership in learning and teaching across the

institution, increasing faculty engagement. In supporting this SIF, CELT is committed to providing opportunities for the growth of OERs at TRU, and encourages faculty to develop meaningful curricular resources and pedagogical methods for their disciplines.

Open Learning:

The OL Service Plan 2018/19 for the Curriculum Development Unit includes the following initiative from TRU's Strategic Priorities: #4. Promote and enhance open educational practices and flexible learning.

Within OL, this includes participating in conferences, developing and revising courses to include OERs, contributing courses to the OERu, and creating OERs for the greater good of the educational community.

Since the revision of an OL history course, based on an open textbook and other OER, there has been an increase of nearly 100% in enrolment between 2015-16 and 2016-17.

University Library:

The University Library is committed to providing access to the resources and expertise that students and faculty require to be successful learners, teachers and researchers. The University Library's Open Education Librarian has been intimately involved in campus efforts to date in adopting, adapting and integrating OER into courses across campus. The Library is fully engaged with the informal OER working group formed to begin to address the TRUSU initiative aimed at open educational resource development and is committed to supporting student success in any way possible. The 2018-2019 University Library Strategic Services Plan includes ongoing support of open educational resources (OER) initiatives for TRU and a commitment to explore the issue of "textbook reserves" which is another approach to supporting student needs for affordable access to required course readings in furtherance of student academic success. The University Library is a source of expertise on open access including identifying existing resources for inclusion in courses and supporting faculty efforts to integrate open resources for use within courses.

Market Analysis (or Cost-Benefit Analysis)

N/A

Competition

TRU's early lead in OER adoption has diminished in recent years as institutions such as Kwantlen Polytechnic University (KPU), Langara College, Douglas College, University of British Columbia, and Camosun College have moved ahead of us in adopting OER for their campuses. KPU, SFU, BCIT and UNBC have all implemented OER grant programs to encourage OER adoption, adaptation and creation in their courses. This SIF request is meant to enhance our ability to compete with other like-minded institutions, to demonstrate TRU's commitment to open educational resources and to provide faculty with meaningful support to

integrate OER into their teaching. Beyond the integration of OERs into the teaching practices at TRU, this grant program will help to reestablish TRU's standing as a leader in open education in BC and Canada.

Advertising and Promotion

Educating faculty by providing informational and how-to workshops via CELT, establishing an OER Development Grant website, meeting with faculty chairs and faculty councils, as well as providing opportunities to present and attend provincial, national and international workshops and conferences related to OER will bring awareness and enthusiasm for OER development and adoption. We will consult with MarComm to explore launch and promotional opportunities and mechanisms.

Initiative Sustainability

Outcome measures

Financial impact of OER integration: In order to calculate the financial impact of the grant program on TRU students we will add up the total number of students annually in all courses using OER. Relevant data will include:

- Total investment in grants program
- Number of funded courses
- Total enrollment in funded courses over time
- Average textbook costs
- Total student savings after one year

The extent of faculty dissemination of their work in developing and integrating OER, i.e., presentations and/or publication of results of their efforts.

Financial Sustainability

Staffing Model

No additional staff, or funding for staff support, is required during the first year or pilot phase of the program.

Project steering committee:

- Brenda Mathenia, University Librarian
- Brenda Smith, Open Education Librarian
- Naomi Cloutier, Acting Director, Curriculum Development Unit, Open Learning
- Catharine Dishke Hondzel, Director of CELT

The project steering committee will work collaboratively with the informal OER working group (which first met on October 5, 2017) which includes representatives from TRUSU, University Library, Open Learning, CELT, faculty reps, and administrators.

In addition to the funding provided by these grants, staff from the TRU Library, OL and CELT will be available to assist recipients in locating, evaluating and adapting high-quality open resources as an alternative to commercial course materials.

Projected Revenue

N/A

However, we anticipate that there may be indirect revenue by increased course enrollments and retention. Anecdotally, it has been reported by OL that since the revision of an OL history course that is using an open textbook and other open educational resources, there has been an increase of nearly 100% in enrolment between 2015-16 and 2016-17.

Projected Expenses/Budget

Faculty grants	5 x \$6,500	\$32,500
Faculty travel support	5 x \$500	\$ 2,500
Technical support (OL)	5 x \$1,000	\$ 5,000
Total Project Budget		\$40,000

Risk Assessment

Risks:

- Lack of faculty buy in
- Competition from other institutions that are providing more OER based courses
- Negative impacts to enrollment due to the barriers of high textbook costs
- Negative impact to student success and retention because they cannot afford to acquire the resources needed to succeed in their courses
- Reduced access to education for traditionally marginalized groups

Benefits:

- Demonstrates TRU's responsiveness to student needs as identified by TRUSU
- Demonstrates meaningful commitment to supporting faculty in their teaching
- Reduces the barriers to accessing education for many students
- Positions TRU as a leader in the OER adoption, adaptation and integration
- Increases TRU's competitiveness in the post-secondary sector in BC

Appendices

Appendix A: “An Open Textbook Grants Program”, TRUSU proposal to APPC, 2017.

Appendix B: BC campus statistics page: <https://open.bccampus.ca/open-textbook-stats/>

Appendix C: “OER: The Future of Education is Open”, Educause Review, September/October 2017

Appendix D: Draft Program Eligibility and Application Process



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Appendix A

An Open Textbook Grants Program

Why have a TRU Open Textbook Grants Program?

The Thompson Rivers University Students' Union presents, for consideration by the Senate, a proposal for an Open Textbook Grants Program.

Open textbooks are course materials created, published, distributed, and adapted under open copyright licenses. This minimizes restrictions on use to provide users the greatest possible benefits. There is enormous potential for open textbooks to contribute to the accessibility and affordability of post-secondary education (see attached backgrounder).

However, we also recognize that integrating open textbooks into courses adds time and effort to faculty members' busy workloads. We believe that TRU should invest to recognize the value and facilitate those efforts through our proposed grants program.

This is not simply a worthy addition to our work here at TRU. Open education is at the heart of our mandate and mission as outlined in both the TRU Act and the Strategic Priorities.

The university must promote teaching excellence and the use of open learning methods. – Thompson Rivers University Act
(www.bclaws.ca/civix/document/id/complete/statreg/05017_01)

We promote access to open educational resources and learning. – Thompson Rivers University Strategic Priorities 2014-2019
(tru.ca/_shared/assets/2014-2019_StrategicPriorities_PDF31428.pdf)

We believe this program would provide considerable benefits for both students and faculty here at TRU, but is also a critical piece of our role in post-secondary education in this province and beyond.

We have modelled our proposal after four very similar programs in place at institutions across BC, and seek to replicate and build on their demonstrated success.

Our Proposed Program

Purpose

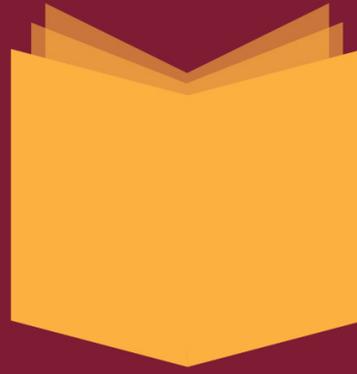
- Support TRU faculty members to integrate open textbooks into their courses
- Build capacity for the creation and adaptation of open textbooks that are up-to-date and appropriate for TRU curricula



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Resources

- Staff support from Library/Centre for Excellence in Learning and Teaching
- Up to \$5000/grant (\$50,000/year total for the program)
- Course release, when creating a new open textbook (two course releases/year total for the program)

Principles

- Eligibility
 - Applicant: Any instructional faculty member(s)
 - Expenses:
 - Student assistants
 - Data collection and analysis
 - Dissemination (i.e. conferences)
- Evaluation
 - Extent of creation or adaptation of open educational resources
 - Potential impact on student experience – quality, accessibility, open pedagogy, and cost savings
 - Distribution of grants across a range of disciplines
- Expectations
 - Participate in open educational resources workshops
 - Share experiences with colleagues at TRU
 - Provide a summary report
 - Make the end product “open”
 - Plans to (re)use open educational resource in courses in the future

Outcomes (at full implementation)

- Participation
 - At least 10 projects/year
- Production
 - At least 2 new open textbooks/year
 - At least 3 adaptations/year
 - At least 3 ancillary materials/year



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Support for a TRU Open Textbook Grants Program

The Thompson Rivers University Students' Union has been engaging students and open education experts in building support for our proposal.

Since September 2016, over **1,800** students have signed a petition calling for the creation of such a program to support the creation and use of open textbooks.

In developing our proposal, we have drawn on the experience of other institutions that have operated similar programs. More information about these programs is available as follows:

- Simon Fraser University (sfu.ca/oergrants.html)
- Kwantlen Polytechnic University (kpu.ca/teaching-and-learning/open-education/grants)
- British Columbia Institute of Technology (commons.bcit.ca/library/2016/06/29/open-education-sprint-grants/)
- University of Northern British Columbia (unbc.ca/centre-teaching-and-learning/oer-development-grant)

Key staff from these programs have also provided endorsements of moving forward a similar program at TRU (see attached letters in full):

In my experience at KPU (currently the leading institutional adopter of open textbooks in the province), the creation of an OER grant program has provided several of our faculty with the critical assistance or time that they needed to locate relevant and high-quality OER and to adapt these for their courses. Aside from the significant cost savings to students, this small institutional investment has helped catalyze pedagogical innovation while building a culture of collaboration across the university.

Rajiv Jhangiani, Ph.D.
University Teaching Fellow in Open Studies & Psychology Instructor, KPU
Open Education Advocacy & Research Fellow, BCcampus

We are pleased to support TRUSU's proposal and believe that our relevant experience with the OER grants program at SFU strongly demonstrates the potential benefits of such a program to faculty, students and staff alike.

Hope Power
Teaching and Learning Librarian, SFU
On behalf of the SFU Open Educational Resource Grants Team



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Our Request of the Senate

The Thompson Rivers University Students' Union humbly requests that a voting Senator move and that the Senate consider and resolve that:

The Office of the Provost and Vice President Academic develop and report back to the Senate, not later than its September 2017 meeting, a plan to implement an open textbook grants program in accordance with the purposes, resources, principles, and outcomes described in the proposal presented.

Dear Mico,

Thank you for reaching out. I was delighted to learn of your efforts to raise awareness and support the adoption of open educational resources (OER) at Thompson Rivers University. As you know, the adoption of OER provides clear benefits to students in the form of immediate, permanent, portable, and cost-free access to required course materials. However, OER adoption also benefits faculty (by granting the freedom to adapt course materials to suit their pedagogical goals and course structure) and the institution as a whole (via better student performance, greater enrolment intensity, and higher student retention; see <http://openedgroup.org/review> for a review of this research literature).

TRU already has a reputation for innovation in teaching and learning (something I saw up close during my years as an Open Learning Faculty Member) and a good number of staff and faculty who have expertise with working with OER (including for TRU's OERu courses). Both of these factors—openness to innovation and OER expertise—are significant strengths that any campus-wide OER initiative could draw upon.

In my experience at KPU (currently the leading institutional adopter of open textbooks in the province), the creation of an OER grant program has provided several of our faculty with the critical assistance or time that they needed to locate relevant and high-quality OER and to adapt these for their courses. Aside from the significant cost savings to students, this small institutional investment has helped catalyze pedagogical innovation while building a culture of collaboration across the university.

I look forward to hearing about your planned campus initiatives. Please don't hesitate to contact me if I can be of any assistance.

Warm regards,



Rajiv Jhangiani, Ph.D.

University Teaching Fellow in Open Studies & Psychology Instructor, KPU
Senior Open Education Advocacy & Research Fellow, BCcampus



LIBRARY

8888 University Drive
Burnaby, BC V5A 1S6
Canada

February 8, 2017

On behalf of the Simon Fraser University (SFU) Open Educational Resources (OER) grants team, I'm pleased to provide this letter of support for the Thompson Rivers University Students' Union (TRUSU)'s proposal to launch a similar program at your university. Our OER grants program was established in December 2015 with funding from the Office of the Vice-President, Academic, and Provost and is jointly administered by the SFU Library and the Teaching and Learning Centre (TLC).

OER are teaching, learning, and research resources created with the intention of being freely available to users anywhere. The use of OER in higher education is gaining momentum as a means of addressing textbook affordability for students and enhancing broad access to learning resources. The SFU Student Society (SFSS) has identified promotion of Open Textbooks as a priority advocacy issue for the past two years. Follow the hashtag #TextbookbrokeBC to find direct evidence of the impact of textbook pricing on students around the province.

For faculty, the use of OER provides flexibility and control over easily customizable, high-quality instructional resources. Through our grants program, SFU instructors may receive up to \$5,000 to redesign a course using OER as primary course material, and to help them adopt and/or adapt open textbooks or other OER for that purpose. In addition to the funding provided by these grants, staff from the Library and the TLC are available to assist recipients in locating, evaluating and adapting high-quality open resources as an alternative to commercial course materials.

In our pilot year, funded projects covered a variety of subject areas from linguistics to genetics, and engineering to sociology. To calculate the financial impact of these projects on SFU students we added up the total number of students annually in all courses involved:

Initial investment in grants program: \$45,000
Number of funded courses: 11 (via 10 grants)
Total enrollment in funded courses over one year: 2300
Average textbook cost: \$100
Total student savings after one year: \$230,000



LIBRARY

As these courses are offered in subsequent years, the savings will continue. This is a powerful return on investment and directly affects affordability and accessibility of education for current and future SFU students.

In addition, our program has fostered the growth of a local community of practice with interest and experience in OER and open education more broadly. SFU faculty, graduate research assistants, librarians and TLC staff have worked together on small project teams and have also come together several times as a larger group to discuss experiences and share findings.

We are pleased to support TRUSU's proposal and believe that our relevant experience with the OER grants program at SFU strongly demonstrates the potential benefits of such a program to faculty, students and staff alike.

Best wishes,

Hope Power (Teaching & Learning Librarian)

On behalf of the Simon Fraser University (SFU) Open Educational Resources (OER) grants team

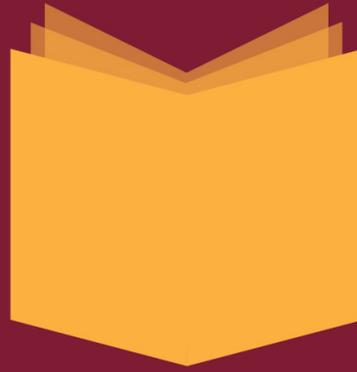
Website: <https://www.sfu.ca/oergrants.html>



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Backgrounder on Open Textbooks

What are open textbooks?

Open textbooks are an aspect of open education, a growing movement around the world to make education more accessible and engaging. The principles of that movement have been defined as follows:

[Open education] is built on the belief that everyone should have the freedom to use, customize, improve and redistribute educational resources without constraint.

Cape Town Declaration on Open Education
(capetowndeclaration.org/read-the-declaration)

In practice, the open education movement creates, distributes, and uses a wide range of resources.

Open Education encompasses resources, tools and practices that are free of legal, financial and technical barriers and can be fully used, shared and adapted in the digital environment.

Scholarly Publishing and Academic Resource Coalition
(sparcopen.org/open-education/)

These resources include videos, lesson plans, software, games, simulations, wikis, blogs, adaptive tests, and textbooks!

Therefore, open textbooks can be understood as course materials created, published, distributed, and adapted without restriction to provide users the greatest possible benefits.

How do open textbooks work in practice?

There are many platforms for the development and publication of open textbooks, but a good place to start is the BCcampus Open Textbook Project (open.bccampus.ca).

A key feature of the processes of open textbooks is that faculty are empowered at every stage.

- **Creation:** This begins with creation. A faculty member(s) prepares the content. BCcampus provides a number of resources online such as an authoring guide to support this process.



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- **Publication:** The prepared textbook is then published “openly”. That means it is published under a copyright license with few restrictions on its use (see creativecommons.org).

Publishing through BCcampus means an open textbook is available in an online database (open.bccampus.ca/find-open-textbooks/). There is a constantly growing inventory of open textbooks available. Many courses will have something appropriate available now, or may in the next semester or year.

- **Adoption:** Faculty members can search the database, and choose to adopt an open textbook that suits their curriculum. Because of the open license, they may also remix or revise the content to suit the specifics of their course. A faculty member then assigns the textbook to their students, who can access it without charge.
- **Review, Adaptation, and Supplementation:** The open textbook process doesn't stop at adoptions. Beyond the customization possible by end users, the content of open textbooks can be continuously updated and improved.

For example, open textbooks can be peer-reviewed. BCcampus will offer honoraria for qualified reviews, and these are then published with the textbook (open.bccampus.ca/call-for-proposals/call-for-reviewers/).

Open textbooks can also be formally adapted or supplemented. BCcampus supports these projects too (open.bccampus.ca/projects-in-progress/). There is an increasing amount of ancillary resources like test banks, videos, presentation slides, etc. that go with open textbooks and can make adoption easier.

What are the benefits of open textbooks?

Open textbooks are, by design, intended to provide the greatest possible educational benefits for users – both students and faculty.

- **Cost-savings:** The obvious advantage for students is cost savings, since open textbooks are free.

Textbook costs have increased 88% in the last decade – more than four times faster than inflation – and are an increasing proportion of education costs. (Bureau of Labor Statistics – bls.gov/opub/ted/2016/college-tuition-and-fees-increase-63-percent-since-january-2006.htm)

This has serious implications on students' financial situation, but also on their learning. Recent studies show that rising textbook costs undermine students' engagement in the classroom. Students often choose not to buy a required textbook, to take fewer courses, avoid a course, drop a course, or withdraw from a course due to



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textbook costs.

- 2016 Student Textbook and Course Materials Survey. Florida Virtual Campus, 2016. (<https://oerknowledgecloud.org/sites/oerknowledgecloud.org/files/2016%20Student%20Textbook%20Survey.pdf>)
- Data on Textbook Costs. Higher Education Strategy Associates, 2015. (<http://higherstrategy.com/data-on-textbook-costs/>)
- Student Budget Consultation Report 2017/18. Thompson Rivers University Students' Union, 2016. <http://trusu.ca/wp-content/uploads/2016/08/1A-SC-I-BC-2017-Report.pdf>
- **Easy Access and Multiple Formats:** The moment an instructor lists an open textbook as a course material, a student can access it online. The student can read it online or download multiple file types to suit them. For a small fee, they can have a copy printed and delivered to their home address. That means there is no delay and no barriers to engaging in the course material.
- **Retention:** Because open textbooks are free, students don't need to try to resell them to the Bookstore or on Kijiji. They can keep their copy throughout their studies - building a library for reference and lifelong learning.
- **Portability:** Because they are available in many digital formats, students can take many of their open textbooks with them wherever they go - without a 50lb backpack.
- **Customization:** Open copyright licenses provide users with permission for what David Wiley calls the 5Rs - to retain, reuse, revise, remix, and redistribute. Faculty are empowered to use the content in ways that best suit a course with minimal restriction. A study last year right here in BC found that 59% of faculty found open textbooks of comparable or better quality than traditional textbooks, and those faculty who had actually used an open textbook rated them even more favourably.
 - Jhangiani, R. S., Pitt, R., Hendricks, C., Key, J., & Lalonde, C. (2016). Exploring faculty use of open educational resources at British Columbia post-secondary institutions. BCampus Research Report. Victoria, BC: BCampus. (bccampus.ca/files/2016/01/BCFacultyUseOfOER_final.pdf)

In concert, these features of open textbooks contribute to a universal benefit of improved learning.



Free for Students



Flexible for Faculty



OPEN
Textbooks

How to get started using open textbooks

Hopefully this has created some interest in using open textbooks and other open educational resources in your teaching. If you want to get started, there are a number of great resources available right now at TRU.

First and foremost is the TRU Library, and specifically Brenda Smith, who serves as the Open Education Librarian.

- Brenda Smith, Open Education Librarian
brsmith@tru.ca
250.828.5098

Brenda has curated a fantastic set of Library Guides on open educational resources including open textbooks, and can be contacted for further assistance in locating appropriate open textbooks and incorporating them in your teaching (libguides.tru.ca/c.php?g=246499&p=1642306).

There is also a larger community of open education champions at TRU, some of whom have prepared a workshop on open textbooks that they have generously agreed to provide upon request. If a department or another group is interested in learning more about how to adopt open textbooks, you can contact them through Brenda.

Appendix B

The screenshot shows a web browser window with the URL <https://open.bccampus.ca/2015/09/10/more-bc-open-textbook-stats/>. The browser's address bar and tabs are visible at the top. The website header features the BCcampus OpenEd logo and a navigation menu with links for About, Festival of Learning 2018, Pressbooks Support, Resources, Calls for Proposals, Projects, and BC OpenEd. Below the header, a breadcrumb trail shows Home > Uncategorized > More BC Open Textbook Stats. The main content area is titled "More BC Open Textbook Stats" and includes a sub-header "As of May 18, 2016". The statistics are presented in two sections: "Open Textbook Adoptions" and "BC Open Textbook Collection".

Posted by [Amanda Coolidge](#) on Sep 10, 2015 in [Uncategorized](#) |

More BC Open Textbook Stats

As of May 18, 2016

Open Textbook Adoptions

Student savings	\$1,428,500 – \$1,818,136
Number of students using open textbooks	14,311
Number of institutions currently adopting	28 (22 Public, 6 Private)
Top 4 adopting institutions (in order)	KPU, Langara, JIBC, Camosun
Number of faculty adopting	142
Number of known adoptions	491

BC Open Textbook Collection

Number of textbooks	151
Number of trades textbooks	55
Number of Top 40 textbooks	96
Number of print-on-demand textbooks purchased since 2012	593

Known adoptions in B.C.

Date range: 2012 - 2018



Student savings	\$5,225,311.00 - \$5,752,463.00
Number of B.C. students using open textbooks	55894
Number of B.C. institutions currently adopting	42
Top 5 adopting institutions (in order)	Kwantlen Polytechnic University, Langara College, Douglas College, University of British Columbia, Camosun College
Number of known B.C. faculty adopting	406
Number of known B.C. adoptions	1693

- Adoption** Each adoption refers to a course section within a specific term and year for which an open textbook has replaced a primary textbook or educational resource that must be purchased.
- Faculty** The number of individual instructors who have adopted one or more open textbooks for one or more course sections. A faculty member is only counted once.
- Savings** Savings include a range as reported in our blog, [Calculating Student Savings](#).
The number at the lower end is calculated as follows: number of students (see "Students") x \$100 (This number was derived by OpenStax College based on a formula that takes into account used textbook purchases and rental costs as well as new textbook costs.)
The number at the upper end is calculated as follows: number of students (see "Students") x actual cost of the textbook being replaced if purchased as hard copy and new.
- Students** The total number of students in all course sections within which an open textbook is used as the primary educational resource.

OER: The Future of Education Is Open

Last March, activists in the Open Educational Resources (OER) movement and representatives of the publishing industry debated with each other at the 2017 SXSW EDU Conference and Festival. When the dust settled, the two sides agreed on two things: (1) the textbook publishing market is “broken,” and (2) the future of courseware will be increasingly digital.

OER are “teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and repurposing by others. OER include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge.”¹ The OER movement is rooted in MIT’s OpenCourseWare project. There are now dozens of repositories that share textbooks, digital resources, and teaching materials. The movement continues to strengthen and gain acceptance. Despite the glut of information supply, textbook publishers continue to increase prices at unsustainable rates.

Need

According to a study published by the General Accountability Office in 2013, textbook costs rose 82 percent between 2002 and 2012—despite the fact that the overall rate of inflation, represented by the Consumer Price Index, rose only approximately 28 percent during the same time period.² The rapid increase in textbook costs has resulted in students increasingly pirating course content, selecting classes and majors based on textbook costs, and sharing their textbooks with friends and classmates.³

Over 22,000 students attending Florida public colleges and universities were surveyed on how the cost of textbooks is impacting access to required materials and achievement. Over 66 percent of students reported not purchasing a required textbook due to the high cost, with 38 percent receiving a poor grade and 20 percent failing a course without the required text.⁴ Even when students purchase the text, they may not use

the text to its full extent, choosing not to take notes or highlight in the book so that they can recoup a percentage of their money by selling it back to the bookstore.

Awareness and Motivation

Awareness of OER as an alternative to expensive textbooks has grown significantly in recent years. In mid-July 2016, the Babson Survey Research Group reported that faculty awareness was 25 percent, a 20 percent increase from the previous year’s survey.⁵

Cost savings for students are often cited as the major motivator for faculty to adopt open textbooks in the classroom and are what students tell faculty they most appreciate about open textbooks, according to a recent study of 51 higher education faculty in California. The quality of the content, the ability to repurpose or adapt it, and accessibility for students both financially and through availability of multiple formats (e.g., print, PDF, web) were also mentioned as key motivators.⁶ In an international study, faculty and librarians from K-12 schools, community colleges, and colleges/universities reported using OER to get new ideas and inspiration for their teaching nearly twice as often as they used OER in their classrooms. Half of the respondents indicated that staying up-to-date in their subject area and broadening the resources available to students were other significant motivators for using OER.⁷

Academic freedom or choice has also been identified as a motivator. Sue Tashjian, instructional designer at Northern Essex Community College and co-chair of the Massachusetts Community Colleges Go Open Statewide Initiative, states: “One of the most exciting things I’ve experienced in supporting faculty with OER adoption is freedom! Faculty are no longer designing courses based on a commercial textbook, by which the publisher dictates how the course is delivered. OER gives faculty the flexibility to bring in current and relevant course materials—enabling them to create and/or adapt the content to match learners’ needs and their teaching style.”⁸



stevechalmers / Gettyimages © 2017



By LISA C. YOUNG, UNA T. DALY, and JASON STONE

Research/Impact

While there is not a great deal of research in regard to student success as new textbooks are adopted, there has been a focus on student success when OER are adopted. Studies have demonstrated that no harm has occurred as a result of the use of OER and that students are performing at least as well as they did with the traditional materials. They have also shown increased student retention and student success using OER.⁹ However, one would think if over 50 percent of students who never purchase the text now have access to materials, wouldn't the success rates with early and continued access to materials be higher? John Gibson, a Glendale Community College faculty member who uses OER, has shared that through the use of course analytics, he has found that students are not accessing the materials as he would like in the electronic format.¹⁰ This could lead one to question how students are using electronic course materials and to work toward the development of best practices to share with students for the use of these materials.

John Hilton III has stated: "Because students and faculty members generally find that OER are comparable in quality to traditional learning resources, and that the use of OER does not appear to negatively influence student learning, one must question the value of traditional textbooks. If the average college student spends approximately \$1000 per year on textbooks and yet performs scholastically no better than the student who utilizes free OER, what exactly is being purchased with that \$1000?"¹¹

Future Directions

Tidewater Community College was the first to develop a degree in which an entire associate's degree pathway, called a Z-Degree, can be achieved by taking courses using OER. The college has shared that students are using their cost savings for a number of things, including taking more courses.¹² OER degrees emerged nationally last year at 38 community colleges in 13 states with the launch of the OER Degree Initiative by Achieving the Dream (ATD), the community college reform network. Contributing to further transformation of teaching and learning at the nation's community colleges, Dr. Karen A. Stout, president and CEO of ATD, added: "Extensive use of OER will enable students to have access to more dynamic learning tools and a richer academic experience at a cost that will help more students complete their studies."¹³

The Community College Consortium for Open Educational Resources (CCCOER), with members in 24 U.S. states and Canadian provinces, was founded ten years ago to expand awareness and adoption of OER to enhance teaching and learning. The consortium's diverse membership cites many factors contributing to the growth of open educational practices and resources. Quill West, open education project manager at Pierce College District (Washington) and CCCOER president, states: "Recognizing that every college is going to approach open education in their own way, we help members to advocate for and grow OER adoption through sharing their experiences, tools, and future plans for spreading OER across their institutions. What we do at

my college might be vastly different than what works at any other member institution, but by sharing what works and discussing challenges, we enrich the overall community. CCCOER also partners with other advocacy and support organizations such as Achieving the Dream and Lumen Learning to grow the wisdom and proven practices for to-scale adoption of open education."¹⁴

Conclusion

Though still in its infancy, the OER movement continues to have a significant impact on students, faculty, and the way teaching is occurring. OER can overcome barriers to students' access to course materials while also reducing the cost of higher education and providing opportunities for faculty to customize materials to their curriculum and to students' needs, potentially increasing student success. ■

Notes

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4. Florida Virtual Campus, Office of Distance Learning and Student Services, "2016 Student Textbook and Course Materials Survey: Results and Findings," October 7, 2016, p. 5.
5. I. Elaine Allen and Jeff Seaman, "Opening the Textbook: Educational Resources in U.S. Higher Education, 2015–16," Babson Survey Research Group, July 2016.
6. Ozgur Ozdemir and Christina Hendricks, "Instructor and Student Experiences with Open Textbooks, from the California Open Online Library for Education," *Journal of Computing in Higher Education* 29, no. 1 (April 2017).
7. Martin Weller et al., "What Can OER Do for Me? Evaluating the Claims for OER," in Rajiv S. Jhangiani and Robert Biswas-Diener, eds., *Open: The Philosophy and Practices That Are Revolutionizing Education and Science* (London: Ubiquity Press, 2017).
8. Sue Tashjian, personal communication with Una T. Daly, May 26, 2017.
9. John Hilton III, "The Review Project," Open Education Group, accessed June 13, 2017; Ozdemir and Hendricks, "Instructor and Student Experiences with Open Textbooks."
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12. David Wiley, Linda Williams, Daniel DeMarte, and John Hilton, "The Tidewater Z-Degree and the INTRO Model for Sustaining OER Adoption," *Education Policy Analysis Archives* 23, no. 41 (March 2016).
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14. Quill West, personal communication with Una T. Daly, June 1, 2017.

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Eligibility and Application Process

The OER Development Grant provides funds to support the adoptions, adaptation and integration of open learning resources (OER) into courses across disciplines to maximize direct benefit to student learners at TRU.

- Applicants must be current TRUFA or TRUOLFA members, including tenured, tenure-track and LTC,
- Application for OER development grant must include:
 - completed application form (to be developed; will include project description and scope, purpose, timeline, budget, etc.)
 - letter of support from the dean and department chair
 - requirement to prepare summary report on OER development project at end of project
- Eligible Expenses
 - Course release coverage at a sessional rate
 - Support for student research assistants
 - Support for persons with a particular expertise/skill set not found in the Library, CELT, or Open Learning
 - Development of data collection instruments and support for data collection and analysis
 - Travel support for dissemination of findings not to exceed 20% of total award
- Evaluation of Applications
 - Applications will be evaluated, reviewed and awarded by the Project Committee
 - Applications will be evaluated on the extent to which the project includes curation and customization of open educational resources that will be freely and openly shared throughout and beyond TRU
 - Potential impact on student experience in the form of high-quality materials, maximum access (e.g., Creative Commons licenses), open and innovative pedagogy, and cost savings to students
 - Inclusion of plans to re-use open educational resources in courses in subsequent semesters
 - Distribution of grants across a range of disciplines
- Expectations of grant recipient(s)
 - Participation in open educational resources workshops
 - Sharing experiences with colleagues at TRU
 - Providing a summary report on the grant activity
 - Making the end product “open”
 - Plans to (re)use open educational resource in courses in the future

Additional costs may be incurred by the granting of course releases, which would be controlled under existing processes for such releases.