

## Affording Access

### *Pathways to Reducing Textbook Costs*

Kelly Banyas & Marleen Cloutier

*Kelly Banyas is an Assistant Professor and the Research & Instruction Librarian for Student Success at The University of Scranton, [kelly.banyas@scranton.edu](mailto:kelly.banyas@scranton.edu)*

*Marleen Cloutier is an Assistant Professor and the Cataloging & Metadata Librarian at The University of Scranton, [marleen.cloutier@scranton.edu](mailto:marleen.cloutier@scranton.edu)*

After piloting an Open Educational Resources (OER) grant program, librarians from the University of Scranton's Weinberg Memorial Library OER Committee conducted a survey of librarians about the inclusion of library resources in OER initiatives. The survey examined if institutions defined library resources as OER, why libraries chose not to include library resources, and, if included, the types of library-licensed or purchased content. The survey found that most (18 of 27) respondents did not include OER and library resources together and, of the institutions that did, a majority (5 of 9) used licensed library resources in addition to open educational and open access resources. The conclusion of this article looks at the pilot grant program and the OER Committee's decision to realign and rebrand the grant in light of the survey results.

## Introduction

At the University of Scranton's Weinberg Memorial Library (WML), students frequently consult library staff and faculty looking to borrow copies of their course textbooks and materials, which are not typically part of the library's collection. Students sometimes try to request their course materials through interlibrary loan, but that presents its own challenges due to the high demand for such materials across campuses. There are concerns at the library that students are avoiding purchasing materials or left financially vulnerable by paying for materials.

When faced with the cost of their course materials, students in higher education have a decision to make: to purchase access to them, borrow a copy, or get along without them. One undergraduate student documents the thought process behind a textbook purchase:

- 1) What does the syllabus say is required? 2) Does the professor strongly recommend it? 3) Do any of my friends or does the library have the textbook in the current or older editions that are 99% the same? 4) Go

through the first two weeks of class without it and see how it goes. 5) If I feel comfortable without it then I do not buy it and if I feel like I will need it I buy or rent it. (Richard et al., 2014, p. 26)

Another question arises: are the books even worth their cost? From 2002 to 2012, the cost of textbooks rose 6% each year, which is three times the rate of inflation (United States Government Accounting Office, 2013). From 2010-2019 the cost of textbooks rose 11%, “with the average price of \$120.16 for textbooks and \$95.87 for regular academic books in 2019” (Aulisio, 2020, p. 349). According to Nagle and Vitez (2020), textbook costs overall remain and will continue to remain high since college students are a “captured market,” with new editions, access codes, and customized editions also limiting students’ buying power (p. 4). Students at private, nonprofit four-year institutions spend about \$1,240 a year on textbooks and other supplies (Ma et al., 2019); this is on top of other costs of education, such as tuition, fees, room and board, which rose 23% for private, nonprofit institutions from 2007-2008 to 2017-2018 when adjusted for inflation (National Center for Education Statistics, 2018).

Libraries and institutions have begun various initiatives and programs to encourage their faculty to use alternatives to traditional textbooks, such as Open Educational Resources (OER) and resources accessed through the library. This study was conducted to determine the extent of use of library resources within OER initiatives and to discuss the reasoning for and the drawbacks to including library resources in the OER conversation. The results discussed were used specifically to inform a new OER initiative at the Weinberg Memorial Library.

## Literature Review

### Impact of Textbook Prices

Studies have been conducted at all different levels to see just how often students are forgoing purchasing a text for a class (Borchard & Magnuson, 2017; Florida Virtual Campus, 2019; Jhangiani & Jhangiani, 2017; Wakefield Research 2018). One large survey of over 21,400 students in Florida found over half of the surveyed students (64.25%) did not purchase a required textbook (Florida Virtual Campus, 2019). In their student surveys, Borchard and Magnuson (2017) reported 59% of students did not purchase all their textbooks all the time and Jhangiani and Jhangiani (2017) found 54% of students did not purchase at least one textbook.

It can also be difficult to budget for textbook costs, as students do not know upfront how much they will be asked to spend until the semester begins (Colvard et al., 2018). Students also cited various factors in making the purchasing decision: “Instructor input, verbal statements, syllabus, friends, first lecture, required, difficulty, online review sites, price, and delay” (Richard et al., 2014, p. 26). Richard et al. (2014) found a majority of students report waiting to purchase the textbook until during or after the first week of class. This is reflected in larger studies; Wakefield Research (2018) found 58% of students said they waited to see what they “would actually need” (p. 2). This is, of course, if the students can afford to purchase the book; students often attempt to defray the cost as much as possible by comparing purchasing options, borrowing or sharing the materials, renting materials, purchasing older versions, getting a job, or using financial aid money (Florida Virtual Campus, 2019; Jhangiani and Jhangiani, 2017; Richard et al., 2014; Wakefield Research, 2018).

This delay can cause students to fall behind even if they eventually purchase the materials; one study found 68% of respondents said they would have done better had they had access to the course material at the start of the semester (Wakefield Research, 2018). Jhangiani and Jhangiani (2017) found 30% of their surveyed students also reported they had received a lower grade due to the cost of the textbook(s). Students who responded that they did not purchase a book at least once “were more likely to self-identify as a visible minority group...hold a student loan...and be working more hours per week” (Jhangiani & Jhangiani, 2017, p. 180). As Buczynski (2007) notes, the prohibitive cost

of textbooks “introduces inequality into the classroom” since not all students have access to the required materials (p. 170).

## Open Educational Resources

Open Educational Resources are one way in which higher education is working to resolve the textbook problem. The UNESCO definition of OER defines them as “teaching, learning, and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation, and redistribution by others with no or limited restrictions” (UNESCO, n.d.). Utilizing open permissions defined by the “5Rs” of Retain, Revise, Remix, Reuse, and Redistribute, OER offer perpetual retention, adaptability, customization, flexibility, and sharing without restriction, in turn reducing the expense associated with traditional textbooks and educational materials (SPARC, n.d.). This openness allows these materials to be adapted for specific learner populations, such as the ability to make adaptations meeting accessibility standards to accommodate those with disabilities or translations to reach global audiences (Thomas, 2018). OER also can be used to supplement existing course materials; Crozier (2018) notes that using OER “need not be an all or nothing approach,” but can be used to “provide different perspectives on topics, while the variety of formats may appeal to different learning styles” (p. 147). There are some caveats, though; as Wiley (n.d.) notes, even open licenses have certain restrictions.

There have been numerous impact studies on how students view the use of OER in their courses, reporting it to be an overall positive experience (Cooney, 2017; Croteau, 2017; Jhangiani & Jhangiani, 2017). Students also commented on the more focused nature of the textbook and particularly valued the immediate access allowed by an OER (Jhangiani & Jhangiani, 2017) and the ease of not having to carry a textbook (Cooney, 2017). More comprehensive studies of general trends in efficacy and perception literature have found that, overall, the use of OER does not negatively affect student learning (Hilton, 2016, 2020). The Open Education Group Review Project (n.d.) identifies and summarizes current literature on OER as part of its continuous review project. At the time of this writing, they identified and evaluated 19 efficacy and perception studies and 23 perception studies and conclude, “in no instance did a majority of students or teachers report that the OER were of inferior quality” (Open Education Group, n.d.). Colvard et al. (2018) found that the use of OER in a course resulted in “a measurable decrease in the number of students failing or withdrawing from a course...the decrease in the number of failing or withdrawal grades is more significant for students from low socioeconomic backgrounds” (p. 272). They also found an increase in A through B+ grades for Federal Pell-eligible students in a course with OER (Colvard et al., 2018).

While the literature reveals OER to be a useful tool for decreasing student costs without negatively impacting the learner experience, many faculty remain hesitant to use or are unaware of OER. In a nationwide survey of faculty, 56% were “Not Aware” of Open Educational Resources and Creative Commons; only 14% were “Very Aware” (Spilovoy et al., 2020). Only 8% of the surveyed faculty at public institutions, however, said they plan on using OER in the next three years, though 27% said they would consider it (Spilovoy et al., 2020). Another survey of faculty found only 42% of faculty were “Not Aware” of OER, but that faculty at minority-serving institutions have higher levels of OER awareness and adoption rates (Seaman & Seaman, 2021). Seaman and Seaman (2021) also found, “After several years of substantial growth in OER use, the most recent numbers indicate a plateau for the use [of] OER as required course materials” (p. 36). Aware faculty can still face a lack of time to find and implement OER (Thomas & Bernhardt, 2018) and implementing new materials creates work in adapting other course materials around it (Biswas-Diener, 2017). The faculty in one survey selected the following categories as their top reasons for not using OER: “there are not enough resources in my subject,” “too hard to find what I need,” and “there is no comprehensive catalog of resources” (Allen & Seaman, 2016, p. 31). General confusion and skepticism still exist in regard to OER and other openly available resources on the internet; Allen and Seaman (2016) note the importance of phrasing in asking faculty about OER, since

the definitions can be confused between free, open, open resources, and open source. There is also the notion that free resources are of “inferior quality or an outright scam” (Biswas-Diener, 2017) and that, as one survey respondent feared, faculty may end up “working for nothing” (Allen & Seaman, 2016, p. 14).

## Library Materials and Affordable Learning

Various libraries and institutions have also started leveraging library resources in order to reduce the financial burden on students. As Bell and Salem (2017) note, the “lack of disciplinary coverage” can prohibit OER adoption and so many libraries turn to affordable learning initiatives or content (p. 78). Sobotka et al. (2019) chose to identify e-books and databases used by faculty as no-cost textbook replacements and “enhance the bibliographic records with course information to consolidate students’ discovery experience” (p.19).

Initiatives that include affordable learning options, such as using course reserves or library licensed resources, also perform positively from the student perspective (Thomas & Bernhardt, 2018; Todorinova & Wilkinson, 2019). The Open and Affordable Textbook project at Rutgers University Libraries found “the majority of students reported that their redesigned course materials provided an improved experience in terms of access, reading, taking notes, and collaborating, indicating that textbook affordability initiatives can offer benefits beyond the financial” (Todorinova & Wilkinson, 2019, p. 275). A mini-grant pilot program at the University of North Carolina at Greensboro allowed for OER and the use of library materials in place of a textbook which saved students in the enrolled classes over \$150,000; surveyed students responded positively to the experience and many of the faculty continued to use the no-cost resources (Thomas & Bernhardt, 2018).

The varied types of licenses or purchasing options available may present roadblocks to libraries instituting affordable learning with library resources. Students and faculty members, in general, tend to have many questions, concerns, and misunderstandings about fair use and copyright. Part of this confusion is based on a lack of consistency in how access and rights statements are described and accessed. Each catalog record, e-book platform, or e-journal platform describes restrictions on use differently and, in some cases, not at all until the researcher clicks further into the resource to examine it more thoroughly. E-resources are controlled through digital rights management (DRM), which prevents users from illegally copying or using software and data from copyrighted materials (Christensson, 2006). The use of DRM typically limits or puts restrictions on how digital resources can be accessed, what types of programs can access the digital file, how long the file can be used, and how it can be distributed or printed.

Digital rights management free (DRM-free) resources allow for immediate, online availability of research articles or e-books, usually part of licensed collections, which can be accessed through institutional IP addresses. Licensed digital resources that are DRM-free can be used by many users simultaneously, in accessible formats, and with unlimited downloads or printing, which allows learners to retain materials after their course has ended while still adhering to copyright and fair use practice. Boczar and Pascual (2017) note that DRM-free e-books are “the model e-book we look for ideally” in their textbook affordability program (p. 99). Borchard and Magnuson (2017) also note publishers do not always offer electronic licenses for books available to the library in print, and many licenses are limited in use. Single-use licenses can function like a course reserve system (Boczar & Pascual, 2017; Borchard & Magnuson, 2017), but often have no time limit on use and therefore, can be unpredictably unavailable (Borchard & Magnuson, 2017).

The same issues exist when adopting and adapting library or alternative course materials that are identified in the OER discussion; faculty still need to revise their existing course structure (Biswas-Diener, 2017) and there is an overall lack of awareness and time (Thomas & Bernhardt, 2018).

## OER and the University of Scranton

In 2019, the University of Scranton's Weinberg Memorial Library (WML) applied for and received Strategic Initiatives Funding through the Provost's Office to promote and support the use of OER at the University. The library's OER Committee began a pilot grant program, which offered an incentive for full-time teaching faculty to adopt OER or designated licensed library resources to replace all or some of their for-cost course materials. The WML redefined OER as "any freely accessible or appropriately licensed, rigorous academic material that is a suitable replacement for expensive textbooks, readings, or other types of required course materials" (Appendix A). To include library resources, the WML further defined "appropriately licensed, rigorous academic material" to include "existing OER textbooks and open-source software that is available online or [they] may compile course materials from library e-books and journals as well as open access journals and e-books" (Appendix A).

The intent of using the non-traditional definition of OER was to emphasize the use of OER as much as possible but also include the use of designated licensed library collections, if necessary, in light of concerns with OER listed in the literature (lack of familiarity, negative perception of OER, lack of particular subject content). At informational sessions held as part of this OER initiative, both the traditional and the WML definition of OER were presented and discussed, emphasizing the differences between true OER and the selected library resources. The call for grant applications also asked applicants to discuss their applications with their liaison librarian, which would allow more detailed conversations regarding traditional OER and the types of library licensed materials we allowed. Library licensed content that was considered appropriate for the initiative included purchased (not subscription based) DRM-Free content with unlimited user access, downloading, and printing capability, allowing for students to retain the materials.

Many faculty members had shown interest in utilizing OER for the Spring and Fall 2020 semesters and we had more applicants than we could fund. Six faculty members were able to receive funding. The successful one-year pilot saved 197 students in grant funded courses a maximum total of \$39,000. In the applications for the Spring and Fall 2020 semesters, the authors were surprised by the engagement with library resources as part of the grant program, which was higher than the use of true OER. As a result, the authors decided to investigate if and how other libraries were incorporating library resources into OER implementation programs in order to inform any changes to the pilot before continuation.

## Library Survey

In order to determine how other libraries have handled the inclusion of library collections as part of OER initiatives, the authors conducted a survey in the summer of 2020. The survey was primarily designed for libraries/librarians who currently have some sort of OER initiative, but if respondents did not, they were asked what barriers they faced to starting an initiative as an additional data point for exploration in future studies. This survey (Appendix B), which included questions about OER initiatives and the types of resources included in them, was sent out to the following listservs: Autocat, ALCTScentral, colldv@lists.ala.org, and collab-l@lists.ala.org. These listservs were selected to solicit responses from a variety of institutions and from librarians who have familiarity with the different types of licensed library material. The survey was open from June 8, 2020, through July 10, 2020, and considered exempt by the University of Scranton IRB.

## Results

Forty-three librarians from academic libraries answered the survey. No librarians from public, school (K-12), or special libraries responded. Carnegie Classifications were used to gather demographics of respondents, and of those

43, 16 were from Doctoral Universities, 7 from Master’s Colleges and Universities, 10 from Baccalaureate Colleges, and 10 from Associate’s Colleges.

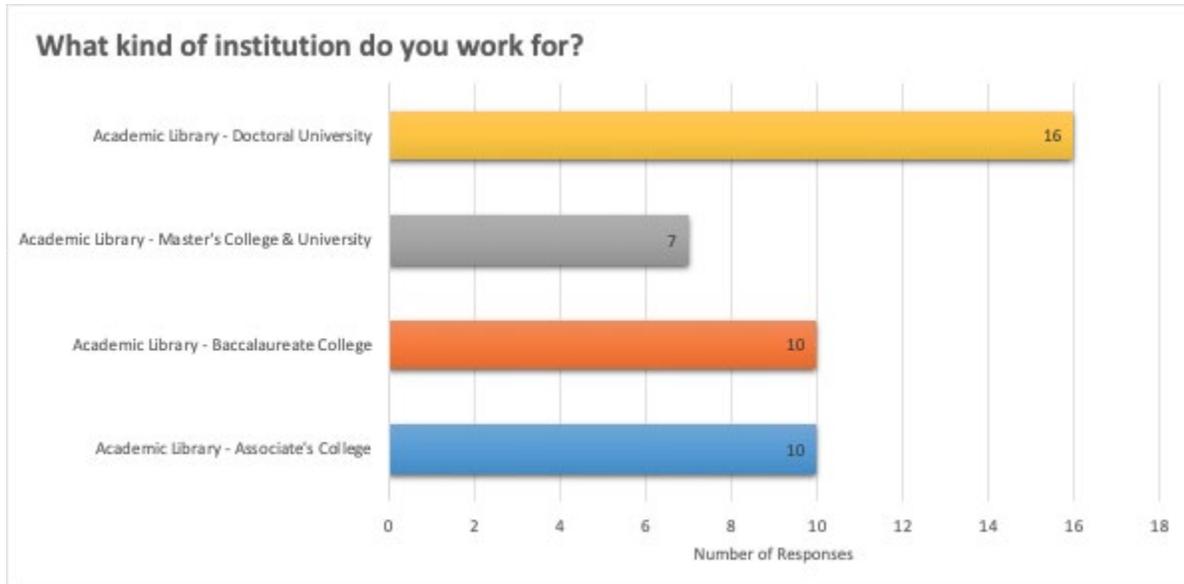


Figure 1  
*Respondents' Type of Institution by Carnegie Classification*

Of the 43 responses, 16 reported that they did not have formalized Open Educational Resource initiatives at their institution. Of the types of institutions identified in Figure 2, 10 out of 16 Doctoral Universities, 5 out of 7 Master’s Colleges, 4 out of 6 Baccalaureate Colleges and 8 out of 10 Associate’s Colleges reported that “Yes” they do have formalized OER Initiatives.

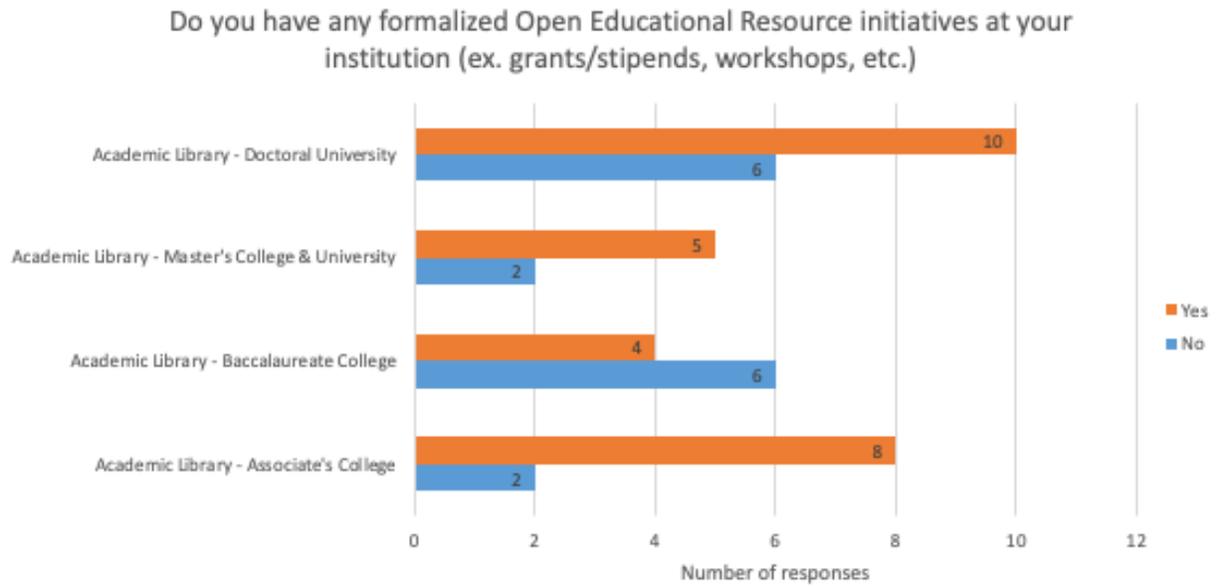


Figure 2

*Identification of Formalized Open Educational Resource Initiatives by Institution by Carnegie Classification*

The survey asked the respondents who identified as having OER initiatives to describe them. Table 1 identifies references the 27 respondents made regarding elements included as part of their OER Initiatives.

Table 1

*Elements Included as Part of OER Initiatives as Referenced in Responses*

Elements included as part of OER Initiatives	Number of times referenced in descriptions
<b>Grant Funding</b>	14
<b>Workshops</b>	8
<b>Stipends for faculty</b>	7
<b>Course redesign</b>	6
<b>Outreach / Advocacy</b>	4
<b>Training support for faculty</b>	3
<b>Assisting faculty in locating OER</b>	3
<b>Research guides / online tutorials</b>	3
<b>Incentives</b>	2
<b>Publishing support</b>	2

Grant funding was the element most frequently referred to in the descriptions. Grant funding varied in terms of what other elements it supported. One respondent indicated that they utilized grant funding “to write competency-based online courses using OER.” Others used grants from outside of their organizations to fund initiatives, stipends, workshops, and training, for example:

Our OER incentives are funded by a grant from the [state] Department of Higher Education. We offer three opportunities for faculty and instructors to receive stipends: submit a textbook review to the OTL [Open Textbook Library], adopt an OER text for their class, and curate OER materials for their class.

## Funding for OER Initiatives

Four respondents indicated the amounts of funding their initiatives offered as an incentive to faculty. The amounts and activities that the grants funded varied. Respondents noted that through their incentives “we give out approximately \$20,000 in grants each year” and “faculty can apply for a \$1,500 grant to adopt an OER or library-licensed resources in lieu of a traditional textbook,” whereas other initiatives identified funding for broader changes, such as, “\$1000 incentive awards to redesign courses to use free or low-cost resources.” Some offered a range of options for funding; one respondent notes, “Our textbook affordability project offers awards ranging from \$500 to \$1500 for faculty who adopt no-cost learning materials or engage in other open education activities; we also provide a \$5000 stipend to faculty who publish an entire open textbook.”

## Institutional Partnerships and OER

Of the 27 institutions surveyed that did have formalized OER efforts, 15 respondents identified partnerships and collaborations between their library and other institutions as a way to aid in advocating for OER, fund initiatives, and offer support to faculty interested in OER. Types of institutional partnerships identified are included in Table 2.

Table 2

*Groups Identified as Institutional Partners or Collaborators*

<b>University Administrations / Parent Organizations</b>
<b>Campus Wide Groups (Committees, Task Forces, Workgroups)</b>
<b>Library Consortiums</b>
<b>Centers for Teaching, Learning, and Scholarship</b>
<b>Online OER Textbook Platforms (Open Textbook Library, LibreTexts)</b>
<b>State-level Governmental Agencies (Departments of Higher Education)</b>
<b>Affordable Learning / OER Advocacy Groups</b>

### Inclusion of Library Content

Of the 27 institutions surveyed that did have formalized OER efforts, 9 included library purchased or licensed content as part of their definition of OER and 18 did not. Of the types of institutions identified in Figure 3, 7 out of 10 Doctoral Universities, 3 out of 5 Master’s Colleges, 4 out of 4 Baccalaureate Colleges and 4 out of 8 Associate’s Colleges reported that they did not include library purchased or licensed content in their definitions of OER.

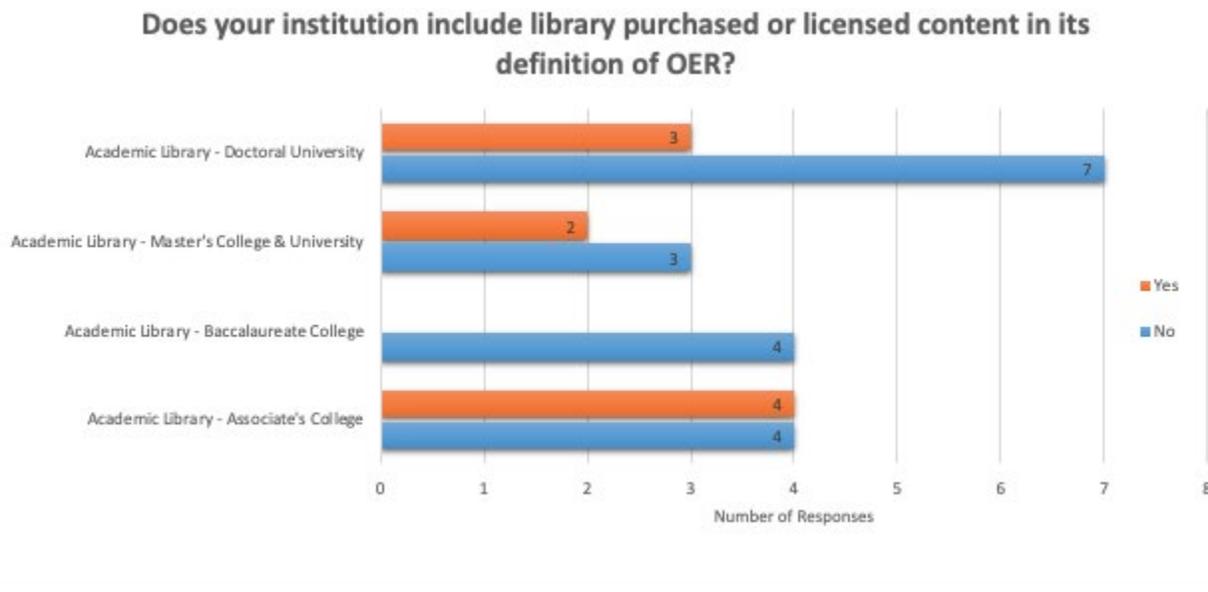


Figure 3  
Responses Identifying Inclusion of Library Purchased or Licensed Content as Part of the Definition of Open Educational Resource

### Not Formal OER

For those who did not include library resources, many referred to the formal definition of OER and the difference between free to students and free and open for all as well as the inability to reuse, remix, revise, etc.

Table 3  
Responses Regarding the Decision to Not Include Purchased or Licensed Library Resources

If you do not include purchased or licensed library resources, why not?	Number of Responses
<b>They do not meet the formal definition of OER</b>	15
<b>Library resources are treated separately from OER</b>	6
<b>To avoid confusion with faculty understanding of OER</b>	1

One respondent wrote, “Licensed library content is NOT [OER] - so we don't want to further confuse faculty who already conflate free and OER - we just refer to free OER content as no-cost course content.” Another respondent

elaborates, “Because purchased content is not open licensed. Purchased content is free to students and faculty, but free and open licensed materials are two very different things.” Another noted while not OER, library resources are utilized within other grants to help reduce the cost of resources:

This is not the commonly accepted definition of Open Educational Resources, and so we don't include that in the technical definition, but we DO fund grants [sic] courses that replace expensive textbooks with library purchased/licensed resources because the goal of our initiative is to save students money, and this still furthers that goal.

One respondent notes that both are utilized in the course material affordability project, but “savings are calculated separately.” Another respondent notes, “We are really careful to present often about the difference between OER, Open Access, and library subscription resources, as they are not the same types of materials. But we do mention our resources!”

### Purchased, Subscription, or Both?

The survey identified 6 possible variations in the choice of license types for library materials institutions were considering as part of their initiatives (Table 4).

Table 4

*Licensed Library Material Content Types*

<b>All library content - All license types</b>
<b>Purchased - All license types</b>
<b>Purchased and Subscription - DRM-free only</b>
<b>Purchased-DRM-free</b>
<b>Subscription - All license types</b>
<b>Subscription - DRM-free only</b>
<b>Other/Not sure</b>

Of the institutions that do include library materials as a formal part of their OER definition, most (5 out of 9) utilized all types of library resources.

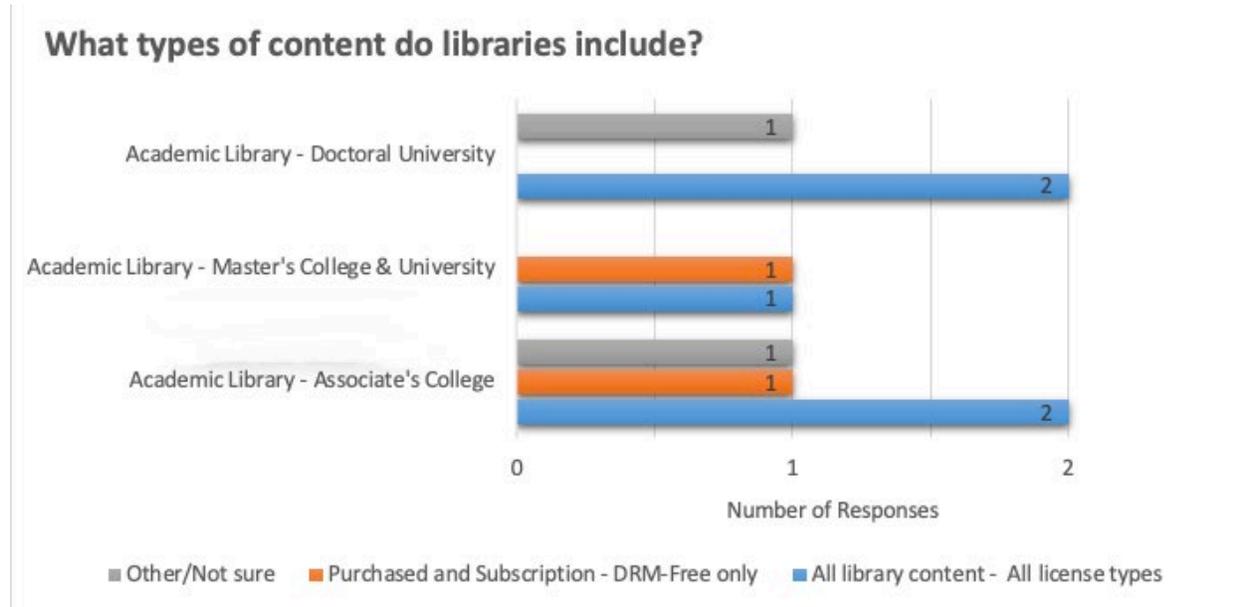


Figure 3  
*Responses Identifying What Types of Content Libraries Include in Their OER Initiatives*

Purchased materials would be owned by the library, making these resources available for as long as the library held the content, whereas subscriptions are contracted or licensed by the library for a specific amount of time. While many subscriptions can be held long term, the likelihood of materials changing or no longer being offered within subscription packages is higher than purchased materials. Two respondents used only DRM-free resources, electronic library materials that have no user limits, download limits, or printing restrictions, and two respondents marked “Other/Unsure.” One elaborates:

Locally we've been adding open textbook collections such as BCcampus ebooks. More recently our consortium has begun adding several OER collections to the consortial catalog and offering the same records for local loads. I'm not sure if the consortial collections were purchased/licensed in some way or belong to some subscription. Some of our subscriptions include OERs along with 'closed' materials. We've also been actively seeking out open collections of government reports that specific subject areas [sic] and catalog these as needed.

Another writes, “We use ‘free and low cost’ as our definition and include library purchased materials (DRM-free or unlimited user license) and texts costing under \$40 (bookstore price.)”

### Barriers to OER Initiatives

Of the 16 who reported no formalized Open Educational Resource initiatives at their institution, many listed a lack of support as one of the barriers to starting OER initiatives, both on behalf of administration and faculty (Table 5).

Table 5  
*Responses Regarding Barriers to Starting OER Initiatives*

<b>What are some barriers you see to using OER or starting initiatives?</b>	<b>Number of Responses</b>
<b>Lack of faculty support/participation</b>	7
<b>Lack of support from Institution/Administration</b>	5
<b>Lack of funding support</b>	5
<b>Lack of library staffing to support initiatives</b>	3
<b>Lack of OER resources for some disciplines</b>	3
<b>Lack of time</b>	3
<b>Lack of training / understanding of OER</b>	3
<b>Library/Administration slow to change</b>	2
<b>Issues with platforms/technology</b>	1
<b>Issues with accreditation requirements</b>	1

One respondent wrote:

The biggest challenge is getting faculty on board; while I think many would be receptive, we need to build understanding of what OER are, how they can be useful, and how faculty would go about selecting and adopting them efficiently (because everyone is pressed for time). A few departments have begun using OER on their own initiative; what's lacking is guidance and support at the institutional level.

Another noted:

The biggest barriers are: there is no money for stipends, faculty inertia, faculty don't have time to adopt OER, faculty don't know about how to find and/or evaluate OER, faculty don't understand licensing issues, promotion & tenure issues: the time, energy, and skill it takes to adopt OER is not valued in the promotion & tenure process.

Three of the participants cited a lack of specific OER as a barrier; one respondent notes, "[The] University is interested and a number of departments are using OER extensively, but finding resources outside some limited categories (mostly general-education STEM classes) has been difficult." Another respondent cited "accreditation requirements" as a barrier. The issue of the quality was raised in one response, noting, "Finding materials that are good quality and fits what faculty teach" as a barrier.

A few also mentioned they did not feel ready to start working with OER with their current level of knowledge; one respondent wrote, "I would like to start OER initiatives, but cost and my own lack of knowledge is the barrier. Once I become more knowledgeable, I would pursue it more."

## Discussion

The discussion between the different types of open was represented in the survey responses; one third of the respondents who had an OER initiative did include library resources as a formalized part of their definition. Many other respondents noted that while they had an OER initiative, they advertised the use of their library collections as a separate source of cost-savings. OER can often be combined in initiatives with library resources to promote affordable learning, but as Salem (2017) identifies, "the obvious benefit to OER adoption over increased access to licensed content is the long-term and universal access to the resources" (p. 35).

The authors have noted in presentations and talks focusing on OER initiatives, library resources are sometimes also introduced as an "OER" option, with examples including the use of course reserves and library licensed and purchased materials. This is part of a larger conversation as to what open can mean; Braddlee and VanScoy (2019), observe:

When librarians think about OER as an alternative to materials purchased by students from commercial publishers, they also need to think about how "open" includes rights that unlock powerful possibilities beyond "free to our students" or "freely available on the web." (p. 428)

Braddlee and VanScoy (2019) note the "understandable impulse" for academic librarians to check library collections before open options (p. 428); the authors believe a similar impulse exists for faculty looking to make changes to their courses. At the WML, when faculty were given the option between OER and library resources, only two out of six in the pilot chose to utilize OER. As the initiative continued only three of the eight faculty members who participated in the program (including the pilot) chose to utilize a true OER.

Instantaneous access, though, especially if a student is logged in through institutional IP addresses, can make even licensed resources seem open and "free," hiding the costs paid by institutions and their libraries. As Todorinova and Wilkinson (2019) discuss, when asked, students reported they rarely used library resources in their Open and Affordable Textbook (OAT) program, but the OAT award recipients had, according to the OAT committee, mostly been relying on library resources. As one survey respondent noted, faculty also can confuse "free" with "open," so this confusion may be passed onto the students depending upon how the faculty are referring to resources. Both the survey and the literature point to the need for careful phrasing and explanations of the varying levels of open and licensing.

Purchasing decisions associated with library resources, including the cost and maintenance of licenses for e-resources and subscription services, should be taken into consideration when considering utilization in an OER or affordable learning program. Thomas and Bernhardt (2018) identified that the University of North Carolina at Greensboro CAT project "spent \$23,842 on e-book purchases during the 2016–2017 fiscal year" (p. 264). While the realized savings to students was exponentially greater than the library expenditure, with the approximate return on investment of \$38.79 for each \$1 spent by the Libraries in the project (Thomas & Bernhardt, 2018, p. 264), one cannot ignore the fact that the funding for library resources that are not truly OER or Open Access needs to come from somewhere. In the University of Scranton's case, most of the titles chosen by grant recipients were already in the library's collection. In the few cases where library materials were purchased during the pilot, a total of \$412 was spent on resources, which was primarily due to the loss of physical reserves because of the COVID-19 pandemic. Applicants are advised to consult with their department to secure funding from their library budget to purchase new materials. As one survey respondent noted, one reason for not including library content was that "funds are low right now."

For those who had initiatives, the survey highlighted the reliance of libraries on partnerships from both internal and external sources when it comes to encouraging interest and funding that supports OER initiatives. Implementing OER is an involved process, beginning with a faculty member's willingness to revise or create a new course syllabus through the location and selection of potential resources. While Borchard and Magnuson (2017) note the library is "in the ideal position to lead these initiatives" due to areas of expertise such as information evaluation and copyright (p. 2), without interest and support from both the faculty and administration, it will be difficult to make an impact. This support must also exist within the library itself, as respondents also pointed to a lack of time, experience, and staffing support within the library as a barrier to new initiatives. Todorinova and Wilkinson (2019) noted that textbook affordability efforts and OER promotion will "impact all levels of library operations" and "overlap with many, if not all, core library services and, therefore, it is important for library administrators to have conversations about how these initiatives intersect with all library systems" (p. 275).

Whether they include library resources or not, OER or affordable learning initiatives can highlight and provide a justification not only for the budgeting and maintenance of library resources but also identify a need for increases in library staffing and systems.

## Limitations

This study is not comprehensive of all libraries and OER initiatives, as the authors sought feedback to inform the future direction of the WML initiative. As this survey was sent to listservs, there is no known pool of respondents and therefore no known response rate. One limitation is the targeted nature of the listservs which leaned heavily toward collection development or technical services librarians who may not always be involved in campus OER/affordable learning efforts

Geographic data was not requested from the libraries that submitted to the survey. With geographic regions and states having different levels of interest and funding support for OER initiatives, a survey including the geographic distribution of survey participants would be useful in further discussions on the barriers to OER use and OER program support. The survey was sent out during the summer, when it is possible some librarians are not required to work and therefore may not be checking emails, as well as during the COVID-19 pandemic, which could also inhibit responses due to the associated stresses and complications.

## Conclusion and Future Directions for the WML Initiative

In light of the survey results and the popularity of faculty utilizing library resources as part of the OER Implementation Grant, the OER Committee in the WML decided to rebrand the grant as the Affordable Learning Implementation Grant (Appendix C). While the emphasis on the grant was initially to promote OER, especially considering their open nature and the ability to apply the "5Rs", the reality was that many faculty wanted to capitalize on directing students to library resources for which we had already paid for access. The authors felt that the initiative needed to more clearly separate OER from library resources, as many survey respondents did, and that the term "Affordable Learning" applied more directly to the overall goal of reducing costs of course materials for students. While utilizing library resources does require more work with faculty to confirm copyright clearances and licensing, the level of University of Scranton faculty interest, the literature, and the survey responses indicate this is still a useful strategy to decrease the cost of course materials for students.

The librarians also see this as an opportunity for outreach to faculty regarding intellectual property rights and in areas of copyright and Creative Commons licensing. In the future, the authors would like to promote a more open culture, including the publication of OER resources, and so may investigate launching other recognition or award

opportunities for faculty producing their own OER. The authors agree with one respondent who notes, “We see OER as part of a larger vision of shifting power to authors and the academy instead of big publishers,” and would like to encourage conversations focusing around this movement.

One concern raised in the literature is the difficulty in identifying license types and allowed uses of library acquired resources. As a way of assisting faculty in their search for materials in the catalog, the WML cataloging department is experimenting with identifying appropriate Open Access and purchased DRM-free materials in the catalog to improve discoverability by using keyword-searchable notes. In essence, the department created a curated collection of identified resources that would work within the initiative. The intention was to improve accessibility and ease of search within the catalog for open and affordable library resources.

Although many respondents who defined library resources as OER allow all library resources, the WML initiative will continue to allow only Open Access and purchased DRM-free content as part of the grant initiative. In an uncertain future, where costly subscriptions have the potential to disappear, only including purchased DRM-free or open access content ensures, no matter the budgetary changes, that our students will be able to download and retain access to materials for the semester. If the students download the materials, as allowed by the DRM-free designation, they will retain access to encourage lifelong learning. These types of materials should also remain accessible to faculty through the library for use in future offerings of the class.

The WML decision to rebrand its initiative evolved out of the desire to encourage affordable learning in all of its variation, allowing the committee flexibility in continuing to advocate for our students, collaborate with our colleagues, form partnerships internally and externally, explore methods of access, and push for the utilization of OER, all of which will encourage a more open culture. We agree with Biswas-Diener (2017), who notes:

Open, itself, is often treated like an adjective—as in, ‘this open textbook is free for students’—rather than as a verb, as in ‘if we open this course it will be available to people around the world.’ In the first instance the word open is equated with being free as opposed to its more accurate meaning in which it includes greater potential for collaboration, innovation, and contextualization. (p. 259)

This research offers an entry point into the conversation of open and affordable learning and how libraries can affect student success and help to address financial concerns. Future studies could further examine the definition of openness, working with faculty to identify and understand licensing types, and how the library can utilize its resources (collections and staff) to induce positive changes in the student experience.

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## Appendix A

### Original University of Scranton OER Grant Language from Research Guide

The purpose of the OER Implementation Grant program is to help reduce the cost of a Scranton education by eliminating or reducing the cost of for-profit textbooks and other materials from courses offered by The University of Scranton. The OER Implementation Grant program incentivizes faculty to consider replacing all, or some, of their required course materials with Open Educational Resources (OER). We define OER as any freely accessible or appropriately licensed, rigorous academic material that is a suitable replacement for expensive textbooks, readings, or other types of required course materials. Faculty may opt to use existing OER textbooks and open-source software that is available online or may compile course materials from library e-books and journals as well as open access journals and e-books. A list of helpful resources can be found on this guide.

Successful applicants will receive a \$1,000 stipend and will be expected to provide feedback on the implementation of OER materials in their course. OER Implementation Grants do not need to be used for purchasing course materials. The grants are faculty incentive stipends that are subject to taxes. These grants were made possible by University Strategic Initiatives Funding.

## Appendix B

### Open Educational Resources Survey

Does your library have an OER initiative? We are seeking Librarians willing to share some information with us about the types of Library resources you include and advocate as part of your Library's OER initiative. Please consider taking our survey; it should only take 5-10 minutes, depending on the depth of your answers.

Data from this survey will be compiled into a scholarly project. No personal identifying information will be collected.

There is no known risk for doing the survey and no reward or compensation is being offered.

The deadline for the responses is July 10th.

1. What kind of institution do you work for?
  - Academic Library - Doctoral University
  - Academic Library - Master's College & University
  - Academic Library - Baccalaureate College
  - Academic Library - Associate's College
  - Public Library
  - School Library (K-12)
  - Special Library
  - Other

If answer "Other" to Question 1, then proceed to Question 2:

If answer not "Other" to Question 1, immediately proceed to Question 3:

2. What type of institution do you work for?  
[open response]
3. Do you have any formalized Open Educational Resource initiatives at your institution (ex. grants/stipends, workshops, etc.)?
  - Yes
  - No

If answer "No" to Question 3, proceed to Question 4 then end survey

If answer "Yes" to Question 3, proceed to Question 5

4. Are you interested in starting any OER initiatives? What are some barriers you see to using OER or starting initiatives?  
[open response]
5. Please briefly describe your OER initiatives:  
[open response]
6. Does your institution include library purchased or licensed content in its definition of OER?
  - Yes
  - No

If answer "No" to Question 6, immediately proceed to Question 9 then end survey

If answer "Yes" to Question 6, proceed to Question 7

7. What types of content do you include?

- All library content - All license types
- Purchased - All license types
- Subscription - All license types
- Purchased and Subscription - DRM-free only
- Purchased - DRM-free only
- Subscription - DRM-free only
- Other/Not sure

If answer not "Other/Not sure," end survey

If answer "Other/Not sure," proceed to question 8 then end survey

8. What types of content do you include as OER resources?

[open response]

9. If you do not include purchased or licensed library resources, why not?

## Appendix C

Call for Affordable Learning Grant

**The Weinberg Memorial Library is pleased to offer \$1,000 Affordable Learning Implementation Grants to successful full-time faculty applicants.**

*What is Affordable Learning and OER?*

Affordable Learning aims to reduce the financial burden on students by eliminating expensive for-cost textbooks and course materials with no-cost or low-cost educational resources. OER stands for Open Educational Resources, which include online textbooks, media, and other materials that are available freely for use and can be remixed/reused for educational purposes. For our Affordable Learning Implementation Grants, formerly OER Implementation Grants, faculty may opt to use existing OER textbooks and open-source software that is available online or may compile course materials from appropriately licensed e-books and journals that are open access or available through the Library to replace all, or some, of their for-cost course materials.

For a list of available OER and appropriately licensed Affordable Learning resources, visit [redacted link]. The Library's OER Committee will be hosting an informational session over Zoom about the grants and available resources on October 28th from 11 am – noon if you are interested in learning more: [redacted link].

*To apply...*

Go to the following link to fill out the Application Form: [redacted link].

*Awards*

The library will award up to two \$1,000 Affordable Learning Implementation Grants for Spring 2021 courses. The Implementation Grants do not need to fund purchasing course materials. The grants are faculty incentive stipends that are subject to taxes. For joint applicants, the stipend will be divided. These grants are also made possible with additional funding from The University of Scranton Strategic Initiatives Funding.

A group of Library faculty and teaching faculty representatives invited from the Library Advisory Committee will review all applications. The multidisciplinary judging panel will use a rubric that can be found on the OER Research Guide.

Upon completion of the course, recipients will submit a report documenting the impact that the Affordable Learning Implementation Grant had on their section(s) and if they are planning to continue using OER/Affordable Learning materials in future offerings of the course. Final reports are submitted to the Interim Dean of the Library and will be published on the Library's website.

If you are interested in this opportunity, please consult with the librarian liaison to your department to help you prepare your proposal. For more information, or to be connected with your department's librarian liaison, contact George Auliso, Research & Scholarly Services Coordinator, or Kelly Banyas, Research & Instruction Librarian for Student Success, or Marleen Cloutier, Cataloging and Metadata Librarian.

*Application Deadline: Friday, November 13, 2020*