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David Parker

Alexander Street Press, dparker@astrettpress.com

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Content, Services, Solutions and Space, Blurring Lines in the University



Implications for Publishers, Aggregators, Technology Companies and Libraries

by **David Parker** (Publisher, Business Products, Alexander Street Press; Phone: 201-673-8784) <dparker@astreetpress.com>

In 1998 I was certain the University would be my permanent home and my career would naturally progress from graduate student and graduate teaching assistant to faculty researcher and instructor. But by 1999, awareness of my limitations as a teacher (I liked students and teaching but I did not like grading and administrative requirements) led me to turn my attention to the “outside” world and I began a job search with an eye toward career paths that would allow me to keep one foot in the world of the university and one foot in the world of business. Fourteen years on I have had the good fortune of working nine years in the higher education publishing and services industry with **Cengage Learning** and **Pearson Education** and five years in the research and reference world of the library with the start-up I helped found, **Business Expert Press**. Over this 14 year period I have witnessed education publishers move from a focus on print textbooks to eBooks and digital services. And I have seen the library world move rapidly from a service context where reference librarians selected content aimed primarily at high level Ph.Ds. and researchers, to a service context where patrons are driving content selection through usage, and the library has steadily increased its focus on serving undergraduate and graduate course needs along with its traditional focus on the researcher. And, through it all, I have seen the campus IT department become more and more central in discussions about content and services used across the university from the classroom to the library to the virtual classroom beyond the universities grounds and buildings.

Content and services acquired and used at the university can be broadly categorized in three main areas: educational, scholarly/reference and technology services. Examples of the three, in order, are textbooks, journals and discovery systems; although there are many, many more examples. Historically content has been acquired, distributed and managed by three main centers at the university: the library, the IT department, and the bookstore. In the rest of this paper I will argue that six major trends in higher education will lead to a growing “blurring of the lines” as to where content is acquired, managed and distributed; and that the IT group and library are likely to become more central in the distribution of learning content. As with most things in the university, this will play out slowly and market and institutional forces will, at times, push and pull against this blurring of the lines; but it seems to me to be an inevitable process and here are the six trends pushing it along.

1. Open Access: The open access revolution has been a logical extension of the internet and ubiquitous computing. No longer, the “open activist” will tell you, do we need publishers to produce and deliver books and journals. Researchers and authors can desktop publish, use community-generated reviewing to ensure

product quality and then distribute eBooks and journal articles without cost to the consumer. For many, faculty/university-generated content and research is a public good and, therefore, should be shared at no additional cost beyond the cost of supporting an institution and the researcher. Currently, open access journals are funded by authoring fees for submission (the most prevalent model) or financial underwriting from universities, foundations, government and even publishers. And open access is not confined to learning and research content; open source learning management systems have proliferated as leading universities build learning management systems (LMS) and then share them with other universities. And, more recently, massive open online courses (MOOCs) have emerged, allowing instructors to offer open online courses to anybody, anywhere in the world. The open activists tell us a day is coming when the publishers and the course management providers and, heck, even the university could/will become obsolete (well, many of them anyway). Content, services and courses can all be created, developed and then distributed either free, or with university/state funding and served up to the masses, locally and globally.

2. Patron Driven Acquisition: Not so long ago, a team of librarians would select the books and journals (with faculty input) and many other resources the library purchased, and historically much of it would go unused or very lightly used. The growth of digital publishing, high quality meta data and data analytics has moved the focus of book acquisition away from being primarily a librarian decision, to one where library patrons have a passive but important role in determining the content that is acquired. After reviewing the library online catalog in which the records of a publisher’s eBooks, have been loaded, library patrons can discover the content in search and then trigger a purchase by selecting a title. This all happens in real time and seamlessly for the library patron. At this point of discovery/purchase, the library can decide to short-term “rent” the eBook or purchase the eBook as a perpetually owned single user or multi-user access book file. This model is not without its problems and its detractors, but in the past five years the implementation of patron driven acquisition, or demand driven, has grown dramatically. And with its growth we see new pricing, packaging and collective buying innovations coming from eBook aggregators, consortiums and librarians. Although this model is largely confined to eBooks, it seems inevitable it will slowly (or quickly?) work its way into other resources the library and university acquire. It does not require much imagination to see institutions holding e-textbooks or journals on this model with pay-per-view tied to number of readers accessing, pages viewed, and cumulative hours viewed, etc. We are entering an era of digital media consumption that will be monetized, more

and more, by the consumer’s actual usage, metered, if you will, like electricity consumption. Media companies have powerful disincentives to embrace these models, but it will ultimately be a losing battle as innovators will respond with new delivery and purchase models.

3. The “Flipped” Library: When I was in college and graduate school the library was very, very quiet. There were relatively few digital assets and miles of books. We would go to research and select books, journal articles, periodicals, etc. to support our research needs for classroom assignments and larger research projects. Today the library is principally a gathering and discovering space and a digital one at that. The librarian has become and “embedded” resource helping library patrons navigate the print and digital space. There has been a technology explosion in the past decade in the library and this has meant much more than simply adding more computers. New research databases and digital content products are coming online with increasing frequency. Search and discovery tools are being introduced by large library service companies and small, start-ups as well. Social media has come to scholarly communities, allowing researchers to connect and communicate as with Facebook, but in much tighter networks. And the library is no longer quiet. Many universities have located coffee and snack shops in the library itself. There are designated quiet spots in the library to be sure, but the modern library is a vibrant space. And there is a less visible change taking place. Many librarians and libraries are being invited into the discussion about class content provisioning. The term “flipped classroom” was introduced to describe a model where learning occurs online outside the classroom and where the in-class experience is about facilitating understanding of the newly learned concept. Faculty, department chairs and the IT department are increasingly looking at alternative models for distributing course reading and textbooks to students through centralized models that range from outright university ownership to course material fees built into tuition and often delivered on iPads or other digital devices that are also part of tuition; and the library is getting involved in the process of acquiring or facilitating the distribution of this digital content and even digital devices. The library is being “flipped” in that it is increasingly becoming a space (physical and digital) for broad educational engagement and activity, rather than simply a place to research. The library is becoming the digital nerve center of the university.

4. Education Companies Moving From Content to Services: I began my career as a textbook salesperson. To be sure, we had CDs and Websites, but these were created to “bundle” with the textbook — an effort to increase the appeal of a new textbook over a competitor’s

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textbook or to replace an older edition of the textbook in use. By the time I left **Pearson Education** in 2007, the focus for the future was squarely on educational services to include online testing, online homework products, adaptive learning and distance/hybrid learning applications. Over my time at **Pearson**, I do not recall a single acquisition of an educational content company, while announcements about acquisitions of educational services companies were regular news. Recently the CEO of **Pearson**, **John Fallon**, announced **Pearson** needs less content but better connected content. And this trend toward providing services is evident outside of educational publishing. Recently **Credo Reference**, an aggregator of scholarly and education content and provider of research tools, acquired an online tutoring service, foretelling a much greater commitment to educational services. How personal computers and e-reading devices and online technology will change education is an evolving and unpredictable path, but what is clear is that the mega educational publishers of old are no longer publishers and new educational content will come from a mix of old and new companies, large and small, and from sources we previously did not expect nor anticipate. Increasingly, scholarly/reference publishers will offer educational content. Library aggregation services will offer testing, tutoring and adaptive learning products. And established companies in the library and education space will make acquisitions of small to medium sized companies with unique products and services that leave most of us scratching our heads, but are part of this evolution toward broader product offerings for the library as digital nerve center.

5. Customized LMS/Online Courses for Better Results, Branding and Profit: The number of new entrants in this space over the past ten years are simply too numerous to mention. It began with Blackboard, WebCT and eCollege in the 1990s and has continually evolved to include open source, university-generated learning management systems to small, specialty players focusing on specific disciplines and curriculums. The key features one now sees are “back office” analytics to explore program efficacy (profitability being a key measure of efficacy not frequently rolled out to the larger community) and student effectiveness, adaptive learning paths that adjust to each student’s learning pace and automated assessment and homework products to ease the instructor’s workload. University and program branding are more recent but important additions to this mix as administration seeks guidance to achieve distinction in this era of online education, which is making the physical space/experience less central to the university’s value proposition. We are in an era of declining or flat university budgets and the pressure to control the cost of higher education is being felt across the campus. Increasingly state-funded institutions will need to evolve program offerings to attract students in an era of digital mobility. I am not suggesting the campus experience has diminished in importance, but the ability to pay for that experience is under pressure. Schools will compete for students and funding dollars through position-

ing and program branding. Customized online and hybrid programs developed to highlight a university’s strongest programs will attract students across a wide digital space. It will be many years in coming, but the era of many state universities offering essentially the same service to students based on geography will fade away in a digital era. Companies like **Academic Partnerships** (*academicpartnerships.com*), which bring together faculty, administration and the IT department to build customized online degree programs, will be key players in this transition and the library will be part of this evolution as its holdings align with the university’s educational mission.

6. Institutional Ownership/Distribution of Educational and Other Forms of Content: There have been a number of initiatives to “campus/faculty-create” free textbooks such as Openstax College from **Rice University**. In California there is wide governmental support for the creation of free, standardized textbooks and teaching resources, via a bill signed last fall by **Governor Jerry Brown**. And while free is often encumbered by a scalability challenge, i.e., it is difficult to find a large population of authors willing to work for free, foundations and universities are increasingly resourcing these initiatives. Other options to drive down costs-per-student, however, abound including for-profit services designed to centralize the purchase and distribution of e-textbooks, such as Courseload. When a university partners with Courseload, students receive an e-textbook as part of their tuition and per-book cost is driven way down by guaranteeing the publisher a full-enrollment sale. At a time when as much as 50% of students do not purchase the textbook in the college bookstore, educational publishers are looking for options like Courseload to encourage wider uptake on the product and the sale of digital over print textbooks. University libraries are getting into the game as well. Increasingly subject librarians are looking for resources to direct to faculty for traditional textbook replacement. And publishers are going direct to the administration to sell centralized solution. **Flat World Knowledge** offers a site license to its entire catalog of e-textbooks for a negotiated fee based on enrollment. As teaching resources move from known formats (digital or print textbooks) to more dynamic formats, the models of ownership and usage will likely evolve and often favor the well-funded institution that can develop and deploy the content, but the age-old model of individual faculty selecting content and the university bookstore pushing that content out to students is certainly in transition.

Universities, of course, are home to many other kinds of content beyond textbooks. Many large research-one institutions house large repositories of content either created or acquired by the university. As content goes digital and becomes meta data enabled, it will become more easily shared and, subsequently, monetized. Depending on the depth and breadth of the university’s holdings, the ability to participate in an open marketplace of content viewing and licensing will surely be enabled by a savvy campus IT department or a third-party with a technology platform that can manage rights, licenses and transactions, such as **SIPX** a start-up from **Stanford** specializing in clearing rights and permission on a diverse body of digital content for online learning environments.

The key themes running through these six trends are open content, greater reliance on data analytics, “flipped” spaces (libraries and classrooms) and products, pricing models and distribution strategies tied to customer demand. I don’t have a crystal ball, but I offer the following observations about how libraries and companies that support libraries can think about these forces as they plan for the near future.

Implications for Libraries

- Libraries will be working much more closely with faculty and members of the IT department around educational content, testing services and adaptive study products that are institutionally managed and/or owned. And as more services go online with more providers, concerns about consistency of delivery and availability will be front and center for librarians.
- Libraries will increasingly become incubators for open content: both educational and scholarly.
- As Universities seek better “branding” and program positioning, libraries will be asked to align resources to support these programs.
- Libraries will see the lines blur and often dissolve between publishers, aggregators, and service providers.
- Libraries and universities, via their institutional repositories, will, with much greater frequency, either directly or through third-parties, get into the business of distributing and licensing their unique and valuable content.

Implications for Library Service and Content Providers

- To remain relevant, publishers will need to become less siloed as educational, scholarly and/or professional/trade houses. The library will appreciate breadth over narrowness of offerings from a single publisher. However, increasing granularity in these content offerings will be valued as well.
- Innovation in packaging, pricing and distribution of all forms of content — and especially pricing around access — will be required. Resist this inevitability at great peril.
- Aggregators will need to offer a greater range of products and services that support not only research but teaching, studying and testing.
- Increased partnerships with unlikely partners will be the way forward to evolve in this time of blurring lines. 🌱

Against the Grain is delighted to announce that **David Parker** will be a regular contributor to **ATG**. He is launching a new column entitled “**Blurring the Lines**” in our November issue. In his column, **David** will explore the trends outlined in the article you’ve just read with examples of people and organization pushing boundaries and blurring the lines.