

Against the Grain

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From Affordable to Open: Evaluating Open Educational Resources

Mark Cummings

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From Affordable to Open: Evaluating Open Educational Resources



by **Mark Cummings** (Editor and Publisher, Choice) <markc@ala-choice.org>

[The following is the text of a presentation given by **Mr. Cummings** at the **Charleston Library Conference** on 8 November 2018. It was delivered as part of a three-person panel exploring “**The Library’s Opportunity in Affordable Textbooks.**” Also presenting were **Mark McBride**, Library Senior Strategist at **SUNY**, and **Gwen Evans**, Executive Director of **OhioLINK**.]

I. My name is **Mark Cummings**, and I’m the editor and publisher at **Choice**, a publishing unit at the **Association of College and Research Libraries**.

Those of you familiar with **Choice** know that, unlike the organizations represented by my two colleagues, we are not a provider of instructional materials, affordable or otherwise, so at first blush our role on this panel may not seem obvious. That said, we are close observers of the selection process for scholarly materials, and in that vein, in the spring of this past year we conducted a survey of undergraduate instructors that has direct bearing on the topic. The survey was designed to discover two things relating to the issue of textbook affordability: First, how instructors discover, evaluate, and select materials for classroom instruction, and second, what, if anything, is different about the criteria or methods employed when the instructor sets out to use open educational materials.¹

Our survey was deployed to about 88,000 instructors in the United States, and although the number of responses was low, just under 1,400, we were able to derive some interesting information from them nonetheless. A few words about the distribution of responses are probably in order here, so let me briefly note that our respondents were split almost equally between two- and four-year schools (52%/48%) but overwhelmingly (83%) employed at public institutions. Enrollment at the institutions represented by our respondents was fairly evenly distributed, with no one of the eight FTE ranges provided garnering even 20% of the total responses. Not surprisingly, STEM instructors accounted for almost half (47%) of all respondents, followed by the humanities (30%), social sciences (22%), and “other” (5%). Introductory-level courses comprised almost 60% of the courses taught by these instructors. Our by-no-means “typical” instructor, therefore, teaches introductory algebra at a mid-sized community college that is part of the state university system in, say, California.

Before going any further, I need to point out the most obvious statistical anomaly in our results: the overlap between instructors who claim to use all (7%) or some (60%) OER in classroom instruction and those who use at least some commercial materials (93%). From this high degree of overlap in the choice of instructional materials we can infer that our respondents represent a self-selected — and perhaps minority — instructor population already aware of and favorably disposed to explore open educational materials. Significantly, then, many of their

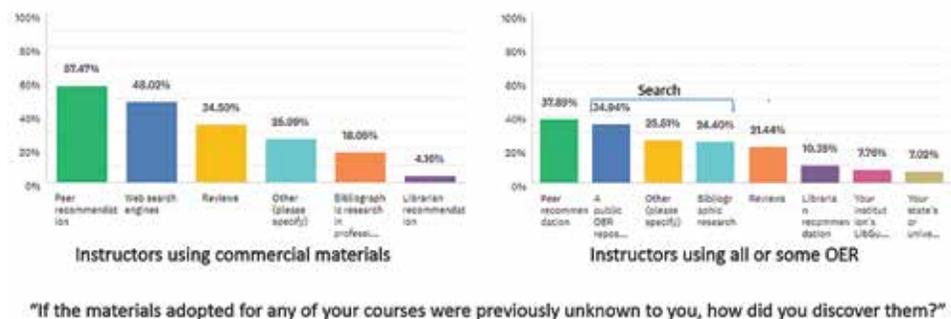
responses betray a notable lack of precision as to what constitutes an open educational resource. Among the “OER” cited by some of the respondents were TED talks, Khan Academy, eBooks, “websites,” YouTube videos, and (interestingly) library holdings. That these materials are free (to the student) but not licensed for modification and redistribution was a distinction not widely observed.

With those facts in mind, let’s take a look at the results of the survey as they relate to affordability and the issue of open education.

II. The survey itself comprised thirty questions, but here I’m going to limit my discussion to three elements of particular relevance to our topic: the discovery, selection, and typology of classroom materials. With respect to discovery, Slide 1 below shows that among those using commercial materials, peer recommendation is the most important factor, followed by web searches and reviews. Significantly, only 4% of the respondents listed librarian recommendation as an element in the discovery process, a fact that bears exploration beyond the scope of this paper.

Among OER respondents, if one aggregates bibliographic research, OER repositories, and “other” (many of which listed “Google search”) generically as “search,” the same ranking of the three principal discovery elements occurs: peer recommendation, search, and reviews. And as before, librarian recommendation appears near the bottom of the ranked elements.

Slide 1: Discovery



“If the materials adopted for any of your courses were previously unknown to you, how did you discover them?”

Next we queried instructors about factors influencing the selection of the materials discovered, asking them to tell us the relative importance of quality, cost, scope and sequence, accessibility, peer recommendations, and so forth. Not surprisingly, among instructors using OER, affordability is the key factor in motivating the selection of course materials, second only to the quality of the materials themselves. But as Slide 2 shows, contrary to the image of instructors as oblivious (or worse) to the cost of textbooks, the same result obtained among instructors using commercial materials. Even given the overlap in the two populations responding to this survey, it appears likely that the issue of cost has now been elevated to a position of prominence gen-

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desire that libraries are not on the same path that **Sears** took. I share the same concern. What about libraries is important? Is it library

as place? As a resource? A service? We can get resources and services anywhere, but not the pensive solitary environment that is the library’s trademark.

During vacation, also had a chance to spend some time reading a riveting book by **Jason**

Fagone. *The Woman Who Smashed Codes* chronicles the life of a truly extraordinary woman, who played an integral role in our nation’s history for forty years. **Elizebeth Smith** (her first name was spelled differently to make it

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erally, especially among those teaching the large introductory STEM courses in which expensive commercial textbooks predominate.

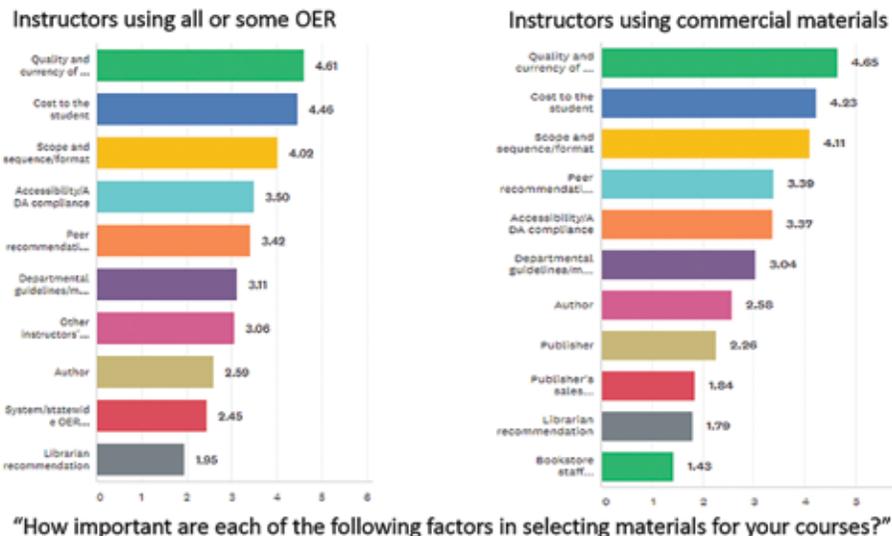
Finally, we asked, What types of instructional materials are used in your courses? (Slide 3) As expected, textbooks constitute the core of all course-material adoptions, used almost universally (93%) by instructors preferring commercial materials and with lower but still substantial frequency by instructors using OER (60%). That textbook use is lower among the OER group is probably a consequence of the fact that there are fewer OER textbooks available for selection. Note also that in OER classrooms, the use of workbooks, test banks, study guides, and digital courseware falls dramatically, likely owing to the fact that these elements are frequent ancillaries to commercial textbooks.

III. From these responses I believe that we can infer certain conclusions about the relationship between affordability and the adoption of open educational resources. First of all, OER selection appears to be based more on affordability than on an ideological commitment to open education. The responses to the selection questions, plus the imprecision around the term *OER* noted above, seems to indicate that it is “free” and “low cost” that are the drivers of OER selection, at least thus far. Second, OER appear to be selected more often as one-to-one replacements for commercial textbooks than as part of a systematic implementation of open pedagogy. Although this is more surmise than demonstrable fact, the popularity of the excellent OpenStax textbooks (and their not-so-adaptable print formats) among our respondents suggests as much.

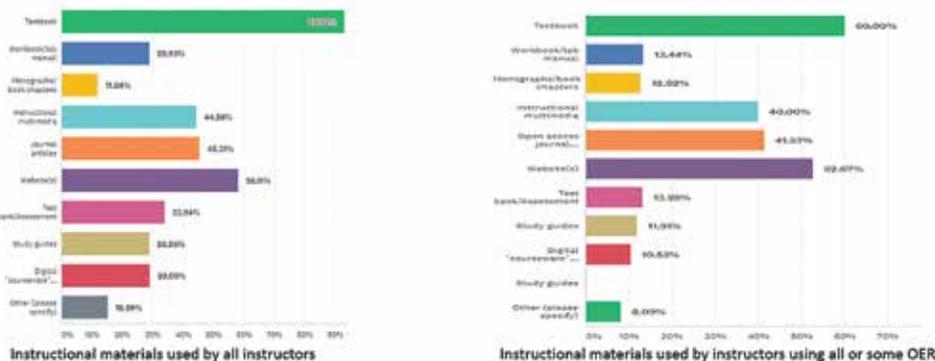
Given this, I think it is reasonable to conclude that for those advocating for OER as a part of a larger program of educational transformation, affordability can no longer be the strategy of choice. Not that affordability is not a good way to introduce OER to skeptical instructors. After all, the notion of free or low-cost course materials is so appealing on the face of it, and so morally attractive from the standpoint of social justice, that it is tempting to believe that affordability in-and-of-itself is sufficient reason for OER adoption. But the formidable incentives now posed by inclusive access programs have seriously undermined the advantages of OER from the standpoint of affordability. It is time to move on.

The facts on the ground as elicited in our survey suggest that instructors occupy various positions on a spectrum of “Open,” from affordable to Open Education, and that as a transitional strategy for OER advocacy, as a way to move instructors and others along this spectrum, it is the quality and availability (that is, the ease of discovery) of OER material that should be now be emphasized. (Slide 4)

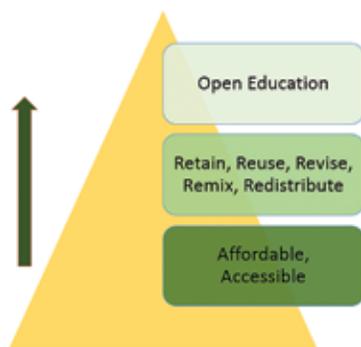
Slide 2: Selection



Slide 3: Typology



Slide 4: Three Levels of “Open”



- Faculty and students collaborate to create their own learning content that is then openly shared and further developed by others
- Materials may be freely modified, edited, and redistributed in accordance with the needs of individual student instruction
- Materials may be discovered, accessed, and used at no cost, free from significant licensing or technical impediments

How do we get from *affordable* to *open education*?

IV. Which brings us to the matter of reviews. We have seen that peer recommendation is the single most important factor in the discovery process, while content quality dictates selection. Functioning both as discovery tools and as sources of peer evaluation of content quality, reviews provide much of the information required by instructors prior to their own examination of the material. But existing reviews of OER tend to be brief and lacking in formal structure, so as part of our strategic initiative around OER, and informed by our long experience in the creation and publication of reviews, **Choice** has created a detailed review template² for the evaluation of open educational resources. The template elicits evaluation in twelve areas: format and source,

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deeper, the individual nature of acquisitions workplaces and workflows, along with the need to be skilled trouble-shooters were main points underlying the response. Discussants noted that on-the-job and situational training and learning would be more productive channels for learning than a course.

With the general consensus in place that “they didn’t teach that in library school” doesn’t reflect our situations or serve our purposes, we challenged the participants to begin to engage with the topic as an opportunity to share knowledge and build professional capacity collectively. Fundamentally, we believe time has come to absolve library school and to build something better together. As a group, the participants were ready to engage in addressing five big questions.

1. What are the core knowledges for beginning acquisitions librarians?
2. How did you gain the knowledge, skills, and abilities necessary for library acquisitions work?
3. What worried you the most at the beginning of your work in acquisitions?
4. What did you feel most unprepared for?
5. What acquisitions duties most surprised you?

The first prompt, “What worried you the most?” led to active conversation around areas of anxiety including the fear of making mistakes, particularly because of the budget implications. The choice of the word “worry” was deliberate, as **Cronk** and **Fleming** had identified anxiety as one of the central issues confronting library acquisitions workers. Anxiety around budget and finance responsibilities was very common, ranging from

finance workflows to negotiation and power dynamics of vendor relationships. A lack of clarity about existing practices also emerged as a concern. A participant discussed her fear of the unknown, explaining that without documentation of her predecessor’s process, she felt pushed to pantomime efforts without understanding why the approach was in place. Many in the room verbally agreed with this point, and it was echoed in many of the written responses as well.

The second prompt, “What were you most unprepared for?” provoked lively discussion of a variety of tools, techniques, and practical realities including data analysis, licensing, budget projection methods, and institutional process. In written responses to the second prompt, common responses highlighted being unprepared for considering and pivoting to see the “big picture” of library acquisitions. Moving from the emotional effort and toll of acquisitions work to the practical and logistical discussion of process provides an interesting counterpoint. Responses indicate that acquisitions workers find themselves unprepared not only for the daily work of acquisitions, but also for asking the more fundamental questions. Taken together, the expressed need is for resources that engage and support acquisitions workers holistically.

The third prompt, “What acquisitions duties most surprised you?” led to a discussion of the multifaceted and evolving role of acquisitions librarians. Acquisitions librarians must be knowledgeable in finance, university operations, library collections, publishing, electronic resources, and more. The scope of the work, the mechanics of the work, and the many stakeholders (donors, reference and outreach librarians, vendors, and administrators) all amplified a sense of being unprepared. Written responses indicated communication might be the most important skill in acquisitions work. Acquisitions workers must translate needs and demands

across disparate groups, often without tools or resources which could make that work easier. Throughout the discussions, we see that many of our information and training needs overlap, as do our collective experiences. How can we share experiences and approaches to ease the transition into acquisitions work?

In terms of identified core knowledges, written responses included a wide and ranging collection of thoughts, the top ten most frequently occurring consolidated and summarized below:

1. Change Management
2. Relationship Management
3. Systems Management
4. Ordering/Invoicing/Records Management
5. Assessment Skills
6. Finance Understanding
7. Licensing Practice
8. Negotiation Skills
9. Critical Thinking
10. Institutional Knowledge

Many of these are elusive concepts, and largely contextual or at least partially situational. Deeper investigation is needed to plan for resources and tools that would begin to address these areas of knowledge, skill, and understanding. For instance, institutional knowledge is entirely contextual. Successful ways to approach gaining institutional knowledge, however, might be a useful area to explore.

As **Cronk** and **Fleming** move to continue to explore and code the feedback and findings from this initial engagement, focus will shift to a deeper investigation of needs and a plan for future exploration. Future activities and opportunities for participation will be detailed at “*Everything Nobody Taught You About Library Acquisitions Work.*” 🌱

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provenance, subject, target audience, licensing, accessibility, adaptability, content quality, pedagogy, interface design, ancillary materials, and competing works. A set of standardized rubrics accompany these elements, along with text boxes for more detailed analysis.

It is important to recognize that course materials are evaluated and adopted by the instructors themselves, who care first and foremost about the quality of the instruction they offer. If they are advocates of open education, they have become so only after a thoroughgoing assessment of its value for their students. For OER to become accepted as alternatives to commercial works, it is essential that instructors have confidence in them, meaning, specifically, that their quality be judged equal to or better than that of their

commercial counterparts. Rigorous, objective reviews, written not as advocacy but as analysis, can play an important role in this process, creating quality benchmarks supporting the enormous creative energies liberated by the open education movement. 🌱

Endnotes

1. The results of our study are summarized in a **Choice** white paper written by **Steven Bell**, Associate University Librarian at **Temple University**, available on our website at <http://www.choice360.org/librarianship/whitepaper>.
2. The **Choice** review template is available at <https://choice360.org/content/1-open-choice/choice-oer-review-template.pdf> and is published under a CC-BY license. Please use freely and share your suggestions for improvement with us!

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odologies; the traditional textbook publishers will bring these ideas into their offerings; and many of those textbooks will find their way into inclusive access programs as librarians take charge. OER, in other words, though likely to hold only a small share of the market, will emerge as the shaper of new instructional materials offered under all business models, triggering a wave of investment in innovations in the college market, which the good lord knows badly needs it. 🌱