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Ohio: The State of Affordable Learning

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Ohio: The State of Affordable Learning



How State Academic Library Consortium OhioLINK Took the Lead, Securing Inclusive Access Price Agreements Directly with Commercial Textbook Publishers

by **Gwen Evans** (Executive Director, OhioLINK) <gwen@ohiolink.edu>

Seeking to lower textbook costs for the college and university students of Ohio, **OhioLINK** recently negotiated statewide pricing agreements with six major textbook publishers and embarked upon an ambitious information campaign centering on the inclusive access, or first day, model of digital textbooks. The publishers involved stated the scale and statewide coverage of this initiative is unmatched in the U.S.

How and Why Did We Take This On, and Where Do We Go From Here?

OhioLINK, one of the nation's largest academic library consortium, is a state agency under the **Ohio Department of Higher Education (ODHE)**. We manage the shared print and electronic library resources of all public higher education institutions in Ohio, from universities to the many two-year and technical colleges, as well as almost all independent colleges and universities of any size — 89 institutions of higher education in all. In practical terms, this covers all non-profit higher education of any size in the state of Ohio.

Ohio's state government, like many states, was increasingly concerned with college affordability including textbook costs. In early 2017, legislation was proposed for a \$300 cap on textbook costs to students, requiring Ohio public institutions to cover the rest of the cost.

It was ultimately shelved, but it had the positive effect of focusing the attention of the Ohio higher education community on the issue of textbook affordability. As a trusted unit of the **Ohio Department of Higher Education**, with some knowledge in this space, we were increasingly called upon to provide advice and ultimately, leadership and action.

Many different experiences, assets, and background knowledge led to **OhioLINK's** approach. We had been engaged in discussions with the sales team at **Wiley**, with which we have both a journal and an ebook package, about possible eTextbook acquisitions on the traditional library package model, but we just couldn't make it work for either of us at consortial scale. I had been involved in discussions with **Unizin**, the non-profit higher education technology consortium, about possible

consortial membership and had been interested in their Engage product, which is their inclusive access textbook delivery platform. I had attended the annual Regional Scholarly Publishing Forums organized by **Gillian Berchowitz** of the **Ohio University Press**, where I was fortunate to be able to talk with university press and library publishers like **Tony Sanfilippo**, **Leila Salisbury**, **Elizabeth Scarpelli**, and **Charles Watkinson** about the costs and challenges of non-profit publishing, including open access monographs and textbooks. Somewhat ironically, it was **OhioLINK's** direct support of our parent agency's \$1.3 million grant for an OER initiative now known as the Ohio Open Ed Collaborative that convinced us that commercial textbooks should be part of a comprehensive statewide textbook affordability strategy. We began our work with the Collaborative in June of 2017, and I was asked by the **Department of Higher Education** to attend an event co-sponsored by the **Association of American Publishers** and the **Ohio InterUniversity Council** about Digital Course Materials in August. Many stakeholders at that meeting — provosts, faculty, legislators, state administrators, the major textbook publishers — held a very active discussion about commercial textbooks and inclusive access, and we were further convinced that libraries and **OhioLINK** had relevant experience and knowledge to contribute.

We considered that **OhioLINK** might be able to provide a statewide inclusive access eTextbook platform that all our members could use, very similar to our statewide Electronic Theses and Dissertation Center (*etd.ohiolink.edu*). However, after demonstrations from the major commercial textbook publishers (**Pearson**, **John Wiley & Sons**, **McGraw Hill Education**, **Macmillan**, and **Sage**), inclusive access platform providers (**Unizin**, **RedShelf**, and **VitalSource**), and **Barnes and Noble**, it became apparent that model wasn't viable, at least at this time. Campus bookstores — chain and independent — have legal contracts and/or revenue sharing arrangements that would have prohibited or discouraged widespread institutional participation. In addition, it was clear that **OhioLINK** would have to commit more staff and resources to such an entirely new service endeavor, also not possible at the time.

We eventually settled on the model of negotiating for price agreements for digital course materials (eTextbooks and courseware) in the inclusive access model with the "Big Five" commercial publishers, along with publishers where we already had agreements (**Sage** fits in this category). In return for lowered pricing in the inclusive access model statewide, **OhioLINK** would use our formidable organizing and communication advantages to present information about inclusive access at scale across the state, but let institutions decide on their desire, willingness, and readiness to implement inclusive access on their campuses. Some key messages in our approach have been "no mandate, but an opportunity" and the protection of academic freedom for faculty. In addition, **OhioLINK** has taken a hybrid approach to textbook affordability, and we strategically use our inclusive access initiative, our OER initiatives, and our libraries' provision of traditional library materials (like ebook packages), in parallel and combined communication venues to present options to our institutions.¹

There were, and are, two major challenges for us in stepping into commercial textbook negotiations:

Getting the Data

One was data gathering from disparate and unfamiliar sources, held by communities with which we had no existing relationships, to enable us to assess potential strategies in the same way that library consortia traditionally assess potential multi-institutional deals. We needed to know what was actually being assigned on our campuses, and from which publishers. Getting that information directly from institutions and their bookstores turned out to be too much staff time and data nor-

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Gwen Evans, Executive Director, OhioLINK



Evans is the Executive Director of **OhioLINK**, Ohio's academic library consortium and one of the top academic library consortia in the nation. She has served as Executive Director since October of 2012. Previously, **Evans** was the Director of Special Projects at the **Ohio Technology Consortium (OH-TECH)**. She came to **OH-TECH** from

her position as Associate Professor and Coordinator of Library Information and Emerging Technology at **Bowling Green State University**. **Evans's** 18 years of experience working in libraries includes the **John Crerar Science Library** at the **University of Chicago**, **Mt. Holyoke College Library**, and **Washtenaw Community College** in Ann Arbor. She has presented nationally on a variety of topics, including library consortia, affordable learning, and library technology. Presentations and authorships include: **Charleston Conference**, **ALA**, **LITA**, **Educause**, the *Journal of Library Administration*, *Library Resources and Technical Services*, *The Charleston Advisor*, *Public Services Quarterly*, and *Music Reference Services Quarterly*.

Evans received a Master of Science in Library and Information Science from the **University of Illinois Urbana-Champaign** and a master's degree in cultural anthropology from the **University of Chicago**, during which she conducted ethnographic research on the island of Flores, Indonesia for two years. 🌱

mization for a pilot project. Ultimately, publishers turned out to be the best source of title adoption data across the entire state. They know what titles are adopted at which institutions, and in which format, as well as a wealth of other data (sometimes in overwhelming detail). One of the surprising pieces of information we learned was how often faculty are customizing publisher-supplied textbooks, auxiliary materials, and course bundles for a particular course or section. These operate as multiple special editions with separate ISBNs that illustrate the challenges of acquiring a “standard” textbook title across an entire state in a package acquisition, for example. Checking inclusive access against market pricing (something our parent agency was very, very interested in) was another difficulty. To solve this problem, we contracted with VerbaConnect from **VitalSource**. VerbaConnect includes a market pricing analysis tool. While **OhioLINK** is not a bookstore, we’re simulating one to get business intelligence about whether our prices are competitive against what students might *actually* pay at **Amazon** or **Chegg** for a digital copy, a rental, or a used textbook. This also creates the need for a data scheduling protocol for assessment, as the pricing in the market fluctuates depending on the time of the year. The major online retailers engage in surge pricing after detecting increased demand, so checking whether our negotiated prices are competitive or not depends on semester start dates across the state.

Many Faces of Sharing Information at Scale

The second, larger challenge was (and is) communication back and forth to stakeholders at every stage of the implementation process. In our initial RFI, we involved representatives of major stakeholders to have them assess what a proposed initiative might look like “on the ground” in the implementation chain. These included a Chief Academic Officer of a community college, a CIO of a public university, and the head of library publishing at an R1 institution who used to work for **Pearson**. We also advertised the demos via our libraries, used WebEx to broadcast them, and allowed any staff member from our institutions to attend. These included faculty, provosts, librarians, bookstore managers, IT staff, instructional designers, and directors of auxiliary services. We solicited feedback from attendees to ensure we had captured multiple points of view and considerations. Consulting stakeholders at various points in the initiative has been critical, both in terms of effective promotion and explanation, and in terms of developing strategies for assessment and negotiation.

We use our library deans and directors as the major targeted communication vectors. They have relationships on campus and know who is responsible for which piece of the implementation chain, which varies across campuses. Do faculty and student government need or want to weigh in? The bursar and financial aid divisions have to be involved — who can start those discussions? The bookstore, IT staff, registration and records, and instructional designers need to understand the workflow from decision to delivery via the course management system. Using library leaders as the information conduits for major announcements, the pricing agreements, and the contracts allows them to be as central to affordable textbook discussions on campus as they want to be. Some library deans and directors simply pass the information forward; some have emerged as the major drivers of inclusive access pilots on their campuses. This approach also allows them to present their OER and library affordability efforts to their campus colleagues as options to consider in a holistic sense, instead of being siloed apart from the normalized workflow of textbook decisions and assignments which happen far from the library.

Since so many campus groups are involved in implementation of inclusive access, we devised a kick-off event loosely modeled on some of our consortial information-sharing practices. The **OhioLINK** Inclusive Access Immersion Event brought together publishers, aggregators, librarians, instructional designers, bookstore managers, bursars, provosts, etc. — anyone from any of our 89 institutions who had an interest. We encouraged institutions to come in teams comprised of those with large stakes in the workflow chain. A panel of librarians, faculty, bookstore managers, and IT staff spoke about their various experiences at different points in campus implementation. **Wright**

State University has been a leader in piloting inclusive access, and their panel “Inclusive Access from Every Angle: A Success Story from Wright State University,” described how it worked from various perspectives from policy to delivery. Their recommendations for successful launch give a sense of the stakeholder universe: Bookstore, Bookstore Client, Bursar, Enrollment Management, Faculty Senate, Financial Aid, IT & LMS Administrator, Office of Marketing, Provost, Registrar, and Student Government. The afternoon was devoted to breakout sessions where specific groups could discuss their particular challenges and solutions, whether those be in the bursar’s office or in CMS integration, or a crash-course in how libraries can lead and how to consider communication of information across campuses. More than 200 attendees from 40 of our institutions walked away with both inspirational and practical examples and a network of colleagues to call upon for advice and assistance.²

We also use our Affordable Learning site to deliver information about inclusive access and OER initiatives; we have an Affordable Learning listserv that anyone from our member institutions, not just librarians, can join. Our next steps are to survey the attendees at the Inclusive Access event to see what the experience with implementation has been, and what were particular challenges and lessons learned. We’ll disseminate that information when we hold the second Inclusive Access Immersion Event in Fall 2019; assess the data on prices and savings from VerbaConnect, and renegotiate the second year of price agreements if appropriate. We’re also working on other marketing and information strategies for inclusive access — as well as our OER initiatives.

Where to Begin and How to Keep Moving

We’ve been contacted by both library consortia and institutions of higher education around the country as they seek to step into the realm of affordable learning, curious about which strategies might work best and how they might take a page of **OhioLINK**’s book to build out their own strategies.

Our first response: Just get started. Don’t wait for perfection. Our second response: Expect bookstores may be a barrier to getting where you want to go. This is the biggest obstacle to scale and ultimate cost to students: Every campus has its own contract with bookstores, whether independent or chain bookstores — and institutions derive profit from those relationships. And our third: Get good at marketing and communications, or find an expert to assist you. Do not underestimate the power of communicating to individual audiences, individually, through a lens that resonates with each of them. Change rarely comes easily, and most certainly not in academia — but affordable learning strategies are ripe with opportunity and positive returns. Your stakeholders will only know this if you communicate benefits clearly and consistently.

At **OhioLINK**, we consider the pursuit of affordable learning and discovery core to what we do. And as librarians we believe in the power and importance of free-flowing information. Because of the nature of our organization, we are used to — and known for — getting things done quickly, efficiently, and frankly, with a skeleton crew. Librarians will understand this — we know how to move from conception to implementation. Our **OhioLINK** basket now includes commercial textbook deals, OER materials, and traditional library content such as eBook collections and databases. We used our experience with our traditional publishers, our growing support for OER creation and adoption, and faculty and student input to create an affordable learning strategy that puts libraries at the center of a very important issue for both students and institutions.

In Ohio, our textbook affordability journey came full circle — from proposed but ultimately shelved legislation, to **OhioLINK** and our libraries stepping into a leadership role, to being invited to participate in the Governor’s State of the State activities as the result of our successes. As a state agency, we came to the attention of the administration, the legislature, and upper administration on campuses in very positive ways, which of course helps protect our funding and current services. But our strategy also delivered a variety of opportunities for libraries and their staff to lead on their individual campuses, and involved them in campus discussions where they have not always been invited.

A major publisher recently informed us that during inclusive access meetings with a major research university, the Library Dean was at

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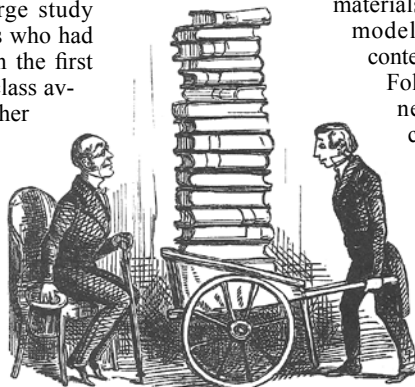
Librarians Provide a New Gateway to Savings for Students

by **Jennifer Becker** (Executive Director, Enterprise Partnerships, Higher Education Group, McGraw-Hill Education)
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Last year, **OhioLINK** became the first state-wide entity, as well as library consortium, to work with **McGraw-Hill** and other publishers to negotiate the reduction of the cost of course materials throughout an entire state's higher education system through inclusive access.

McGraw-Hill's inclusive access ensures that each student in a class automatically has an electronic version of their course materials on day one, at a price that is up to 75 to 80 percent less than a traditional print textbook. Most often in inclusive access a fee is automatically assessed upon enrollment in the class, which is paid alongside tuition through the bursar's office or bookstore. Students who decide to drop the course on or before the institution's designated add/drop date are not charged or refunded. Also, there's an "opt-out" institutions can make available to students who wish not to purchase. **McGraw-Hill** also makes available a very low-cost print upgrade option for those who aren't ready to go all digital.

"We conducted a large study that showed that students who had their course materials on the first day of class maintained class averages some 20 points higher than those who bought them two weeks later," says **Jennifer Becker**, executive director of partnerships at **McGraw-Hill Education**. "As a company we recognized there was a need to go back to basics. Ensuring



the education community has comprehensive, reliable instructional resources is of upmost importance to us. But, it must be done at a price that students can afford."

"I truly never thought about a library system championing this," continues **Becker**, who typically works with academic departments and campus bookstores. "I knew they were the owners of institutional content, but I never knew they had influence on individual course materials for students. The sense I get from some librarians I've spoken to is that they are excited to be part of the state, system or institution's affordability initiative in this way. They've really embraced it."

OhioLINK and **McGraw-Hill** first joined forces on lowering the cost of course materials through inclusive access following the library consortium's request for information (RFI) to publishers, eBook platforms providers, wholesalers and distributors in November of 2017. **OhioLINK** looked at capabilities to implement, distribute and manage course materials via an inclusive access model as well as pricing for content, platforms and services.

Following presentations and negotiations, **OhioLINK** chose four large publishers, including **McGraw-Hill**, to offer the significantly-reduced pricing to all 91 of its member colleges and universities, **Becker** says.

Prior to **OhioLINK** negotiating the deal announced

in March 2018, a limited number of Ohio colleges and universities had implemented inclusive access.

"When meeting with institutions to discuss inclusive access, we would hear 'I don't know if we can do this' or 'I don't know if we can include course materials as a fee along with the tuition,'" says **Becker**. "There was a lot of uncertainty."

OhioLINK, she says, removed barriers. "They really are getting out there and promoting, saying 'This is ok, the **Ohio Board of Higher Education** wants institutions to take advantage of this this model,'" **Becker** says. "We've since seen a pick-up in not only the number of institutions who have implemented it but the number of professors who have opted in to do inclusive access with their course." In 2018 alone through inclusive access, **McGraw-Hill** was able to save Ohio students \$2.7 million on course materials over what was spent the previous year for the same materials.

Business programs have led the way, **Becker** says, followed by science, engineering and math courses. Humanities have been a bit slower to adopt.

"We now know that libraries are playing a critical role," says **Becker**. "An academic library consortium has a stake in the ground when it comes to the affordability of course materials, as much as your procurement, auxiliary services or academic departments do. We're excited that **OhioLINK** has opened their door to us."

McGraw-Hill has also partnered with **OhioLINK** in educating the academic

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the table for the discussion. The library was invited from the outset because word of what **OhioLINK** had accomplished had reached the stakeholders involved. That's the type of success we hope to see spread nationwide — where the power of libraries and their ability to lead in affordable learning is recognized and employed to its full potential.

About OhioLINK

Connecting libraries, learning and discovery. Established in 1992, the **Ohio Library and Information Network (OhioLINK)** is Ohio's statewide academic library consortium serving 118 libraries, 89 institutions of higher education, the State Library of Ohio and more than 570,000 end users. Delivering both IT infrastructure and content negotiation, **OhioLINK** provides students, researchers, faculty and staff with access to digital research collections rivaling top university libraries in the United States and internationally — at a fraction of the cost. **OhioLINK** also connects library services, print and digital collections among its member institutions and manages collaborative

services, including eTutoring, statewide Affordable Learning textbook initiatives, and Open Educational Resources. A member of the Ohio Technology Consortium of the **Ohio Department of Higher Education**, **OhioLINK** creates a competitive advantage for its members and supports student and researcher success in the state of Ohio. Learn more at www.ohiolink.edu. 🌱

Endnotes

1. For more information on **OhioLINK's** rationale for a hybrid strategy, see my guest post on the *Scholarly Kitchen* "Affordable Learning Requires a Diverse Approach, Part 1: Playing the Short Game (and the Long One) to Secure Savings for Students" <https://scholarlykitchen.sspnet.org/2018/10/30/affordable-learning-requires-a-diverse-approach-part-1-playing-the-short-game-and-the-long-one-to-secure-savings-for-students/>.
2. Materials and recordings from the event are available here: <https://affordablelearning.ohiolink.edu/blog/textbook-affordability-and-inclusive-access-immersion-post-conference-materials-now-available>.